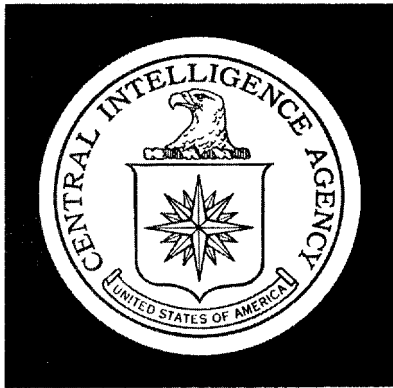


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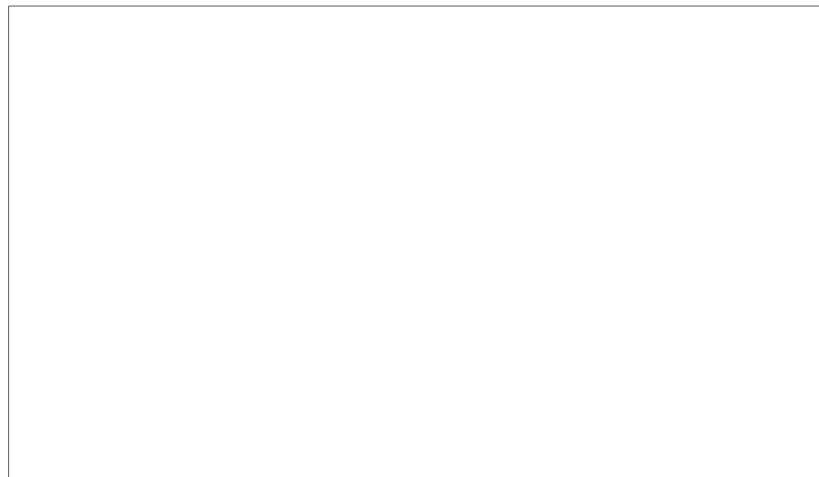
*Foreign Shipping to North Vietnam
in December 1966*

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January 1967



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FOREWORD

The data in this memorandum are preliminary and subject to modification as additional information becomes available. Significant changes may occur in data on ship arrivals and cargoes from Communist China and, to a lesser extent, in data on cargoes carried by ships of the Free World. Data on Soviet and Eastern European ship arrivals and cargoes and on Free World arrivals are not likely to be changed significantly. As required, changes will be reported in subsequent memoranda. All data on cargoes carried are expressed in metric tons.

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FOREIGN SHIPPING TO NORTH VIETNAM
IN DECEMBER 1966*

Summary

A record number of calls by Communist ships in December resulted in the highest number of foreign ship arrivals at North Vietnam since last January, despite unusually low activity by Free World ships. The distribution of ship calls in December and comparative data for 1966 and 1965 are shown in the tabulation below:

	<u>Monthly Averages</u>		
	<u>December</u> <u>1966</u>	<u>January-December</u> <u>1966</u>	<u>January-December</u> <u>1965</u>
Total	<u>38</u>	<u>32</u>	<u>44</u>
Communist	<u>34</u>	<u>25</u>	<u>23</u>
USSR	12	10	7
Eastern Europe	6	4	4
Communist China	16	11	12
Free World	<u>4</u>	<u>6</u>	<u>21</u>
United Kingdom	3	4	11
Other	1	2	10

Seaborne POL deliveries, mostly by four Soviet tankers, reached the largest monthly volume since US airstrikes against petroleum storage facilities were intensified last June. Imports of miscellaneous and general cargoes, primarily metals and other manufactured goods from

* This memorandum was produced by CIA. It was prepared by the Office of Research and Reports, and information on ship arrivals was coordinated with the Office of Naval Intelligence; the estimates and conclusions represent the best judgment of the Directorate of Intelligence as of January 1967.

For details on ship arrivals and the type and distribution of cargo, see Figure 1 and Tables 1 through 6.

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Communist countries, were the highest since July and the second highest on record. Imports of bulk foods, apparently following a seasonal pattern, remained high for the third consecutive month. No shipments of arms or ammunition were detected. In both 1965 and 1966, 45 to 50 percent of the annual volume of seaborne bulk food imports arrived in the last three months of the year.

Exports of coal, which by October and November had recovered substantially from the effects of the April airstrikes against the coal processing facilities at Cam Pha, fell in December to about one-half the average monthly volume in the first quarter of 1966. This decline in coal shipments may have been the result of an airstrike against Cam Pha in November, for which no damage assessment report is yet available.

Comparative data on foreign shipping to North Vietnam in 1965 and 1966 reveal the following:

	<u>1966</u>	<u>1965</u>	<u>Percentage Change</u>
Ship arrivals	<u>379</u>	<u>530</u>	-28
Free World	74	256	-71
Soviet	122	79	+54
Other	183	195	-6
Volume of seaborne trade <u>a/</u> (in thousand tons)	<u>2,046.0</u>	<u>2,410.2</u>	-15
Imports	<u>932.0</u>	<u>697.1</u>	+34
From Communist countries	816.7	549.1	+49
From Free World countries	115.3	148.0	-22
Exports	<u>1,114.0</u>	<u>1,713.1</u>	-35
To Communist countries	545.1	1,011.7	-46
To Free World countries	568.8	701.4	-19
Carried by Communist ships	1,472.4	903.7	+63
Carried by Free World ships	573.6	1,506.5	-62

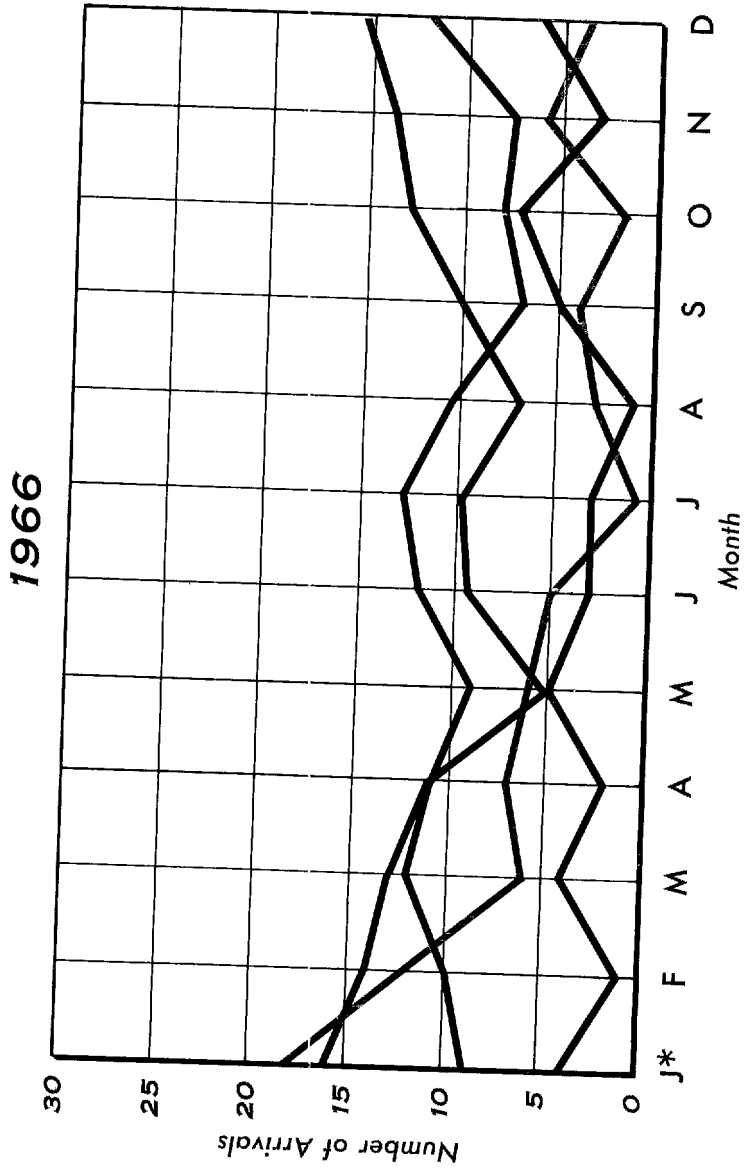
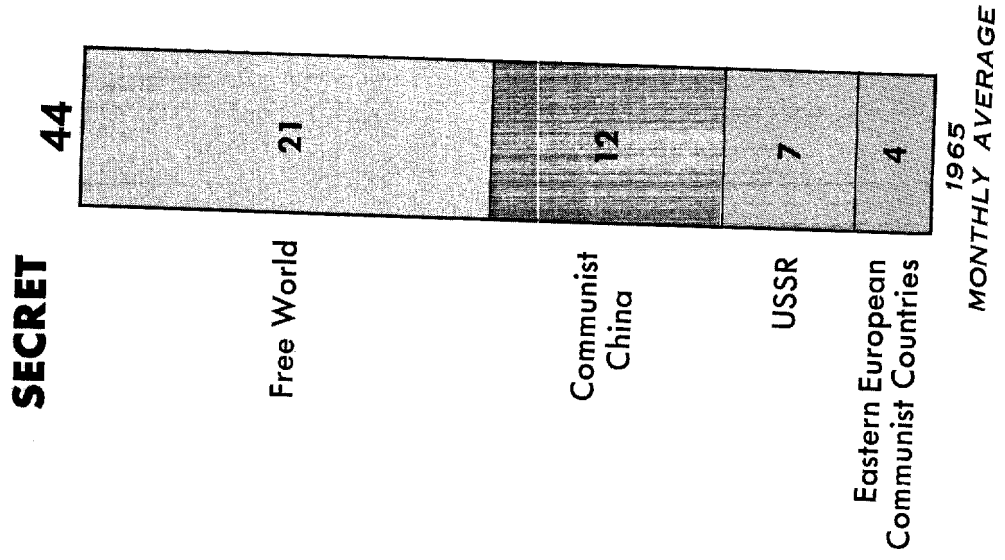
a. An additional volume of North Vietnamese seaborne trade, estimated for each year at 150,000 tons of imports and 50,000 tons of exports, was carried by Chinese Communist and North Vietnamese ships.

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Figure 1

North Vietnam: Foreign Ship Arrivals

Monthly Average 1965 and January - December 1966



* Excluding one Cuban ship

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I. Communist Shipping

More foreign Communist ships (34) called at North Vietnam in December than in any month in recent years. They carried at least 75 percent of North Vietnam's identified seaborne foreign trade.

Twelve Soviet ships, including 4 tankers, delivered 44 percent of identified incoming cargoes. Three Soviet dry cargo ships, which sailed from Black Sea ports, delivered fertilizer, packaged POL, and other general cargoes (see Figure 2). The five remaining Soviet dry cargo ships were chartered to North Vietnam. Two brought general cargoes and wheat flour from Vladivostok, another delivered general cargo from Japan, and two arrived in ballast. Six of the seven Soviet dry cargo ships departing from North Vietnam in December carried exports: two had general cargoes for Cambodia, Hong Kong, and Singapore, and four had coal for Japan.

Sixteen Chinese Communist ships, the largest monthly total since January 1966, called at North Vietnam in December. All but two arrived from Communist China; six of these sailed to Haiphong and eight to coal ports. One Chinese ship, operating under time charter to Chipolbrok,* arrived with general cargoes from Eastern European countries and fertilizer from Morocco, and two ships delivered grain from Cambodia and Communist China. No import cargoes were identified on the 13 other Chinese ships that called. All of the 13 Chinese ships that departed from North Vietnam in December went to China. Four sailed from Haiphong and nine from coal ports, presumably with cargoes of coal.

Six Eastern European ships -- four Polish and two Bulgarian -- visited North Vietnam in December. Both Bulgarian ships were chartered by the North Vietnamese. One of them delivered general cargo from Japan, and the other brought fertilizer and general cargo from North Korea. Two of the Polish-flag ships were Chipolbrok ships with goods from Eastern Europe, and two were in liner service for the Polish Ocean Lines -- one outbound from Europe, the other on the homeward leg of its voyage. Five Eastern European ships departed from North Vietnam in December. A Bulgarian ship carried pig iron and general cargo to Japan, and three Polish ships loaded general cargo for Hong Kong, Japan, Singapore, and European ports. Another Polish ship departed empty.

* The jointly owned Chinese-Polish Shipbrokers Company.

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II. Free World Shipping

Four calls were made by Free World ships in December, and they carried 30 percent of the import cargoes identified aboard foreign ships calling at North Vietnam. A Cypriot-flag ship chartered to North Vietnam delivered fertilizer from North Korea, and two British-flag ships chartered by Communist China carried Chinese goods. One of the British-flag ships is owned by a Hong Kong company; the other, which made two calls in December, belongs to a Gibraltar concern. Five Free World ships left North Vietnam in December. Two carried cargoes of coal for Japan and cement and other general cargo for Cambodia, Hong Kong, and Singapore. Their cargoes constituted 18 percent of export cargoes identified aboard foreign ships departing from North Vietnam in December. The remaining three departed empty.

III. Cargoes

In December, foreign merchant ships delivered the largest monthly volume of cargoes (110,800 tons) on record to North Vietnam.* No shipments of arms or ammunition were detected, but deliveries included petroleum and numerous trucks and other manufactured items useful in supporting military operations. Dry cargo ships departing from Haiphong in December averaged less than two weeks in port, the best turnaround time recorded in several months.

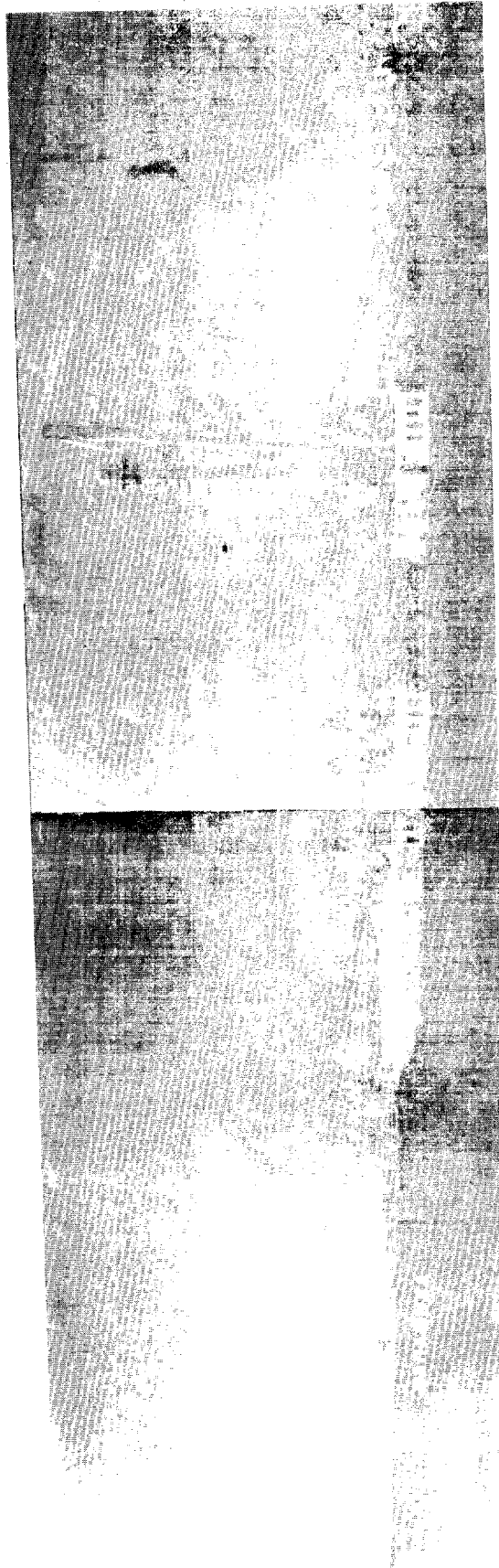
The largest volume of POL deliveries since May, a total of 24,200 tons, was handled expeditiously. Four Soviet tankers delivered 22,600 tons of gasoline and diesel oil, and the rest of the POL was delivered in containers aboard Soviet dry cargo ships. The Rovno, the first tanker to arrive from the Black Sea since September, apparently discharged its entire 10,900-ton load from an anchorage near LeGoeland Isle (see the map, Figure 3). Three small tankers that delivered nearly 11,700 tons from Vladivostok discharged at the Song Bach Dang anchorage. The Rovno and the smaller Amursk (see Figure 4), which were at North Vietnam simultaneously in mid-December, were discharged at a combined rate** of better than 900 tons per day, compared with an average daily rate** of about 800 tons for the five small

* The average monthly volumes of seaborne imports in 1965 and 1966 were 58,100 tons and 77,700 tons, respectively.

** Rates of discharge calculated on the basis of volume of cargo divided by time interval between time of arrival and time of departure.

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WITH A DECK CARGO OF TRUCKS

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FIGURE 2. THE SOVIET SHIP BALASHIKHA

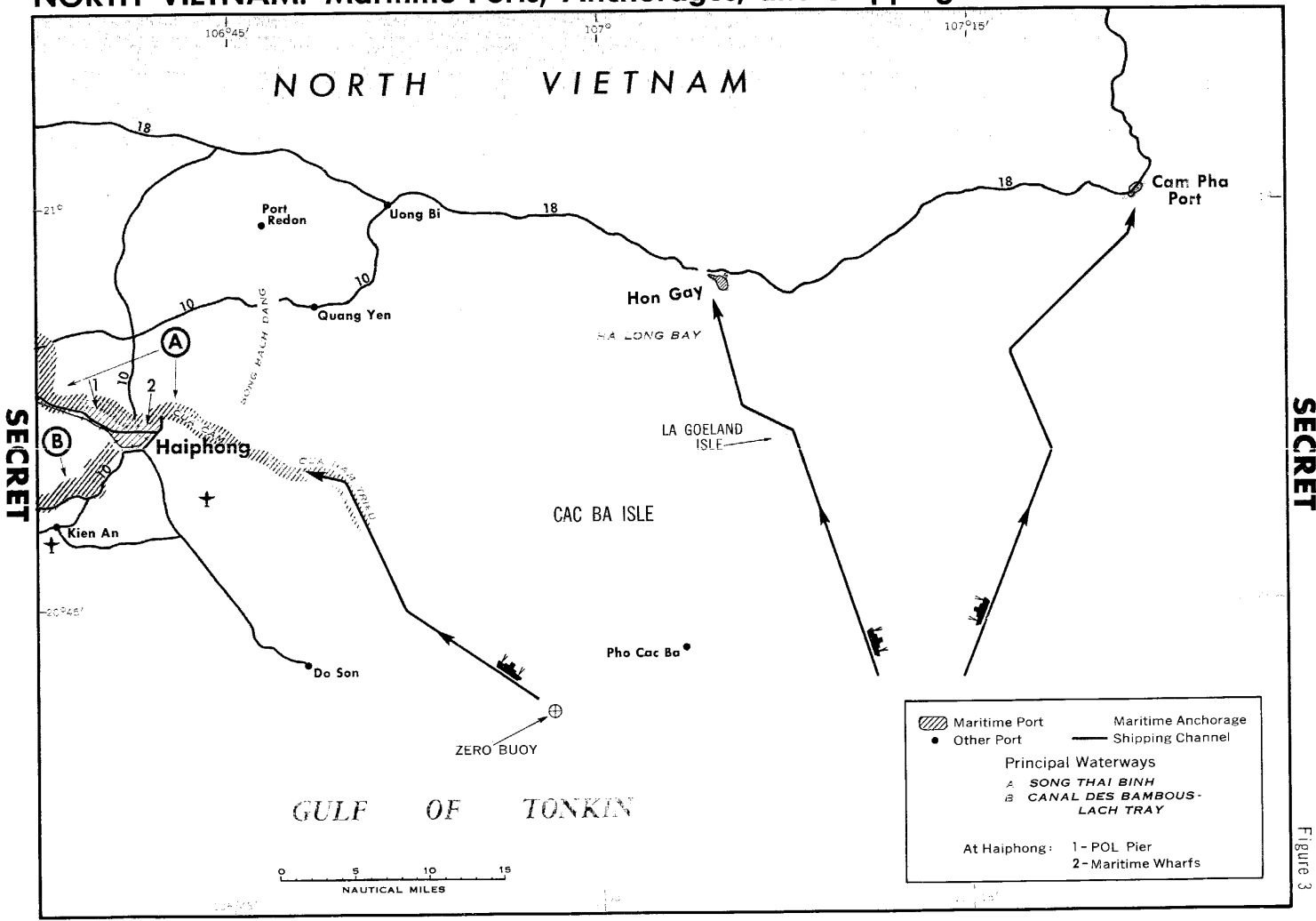
DELIVERED TO NORTH VIETNAM IN DECEMBER 1966

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NORTH VIETNAM: Maritime Ports, Anchorages, and Shipping Channels



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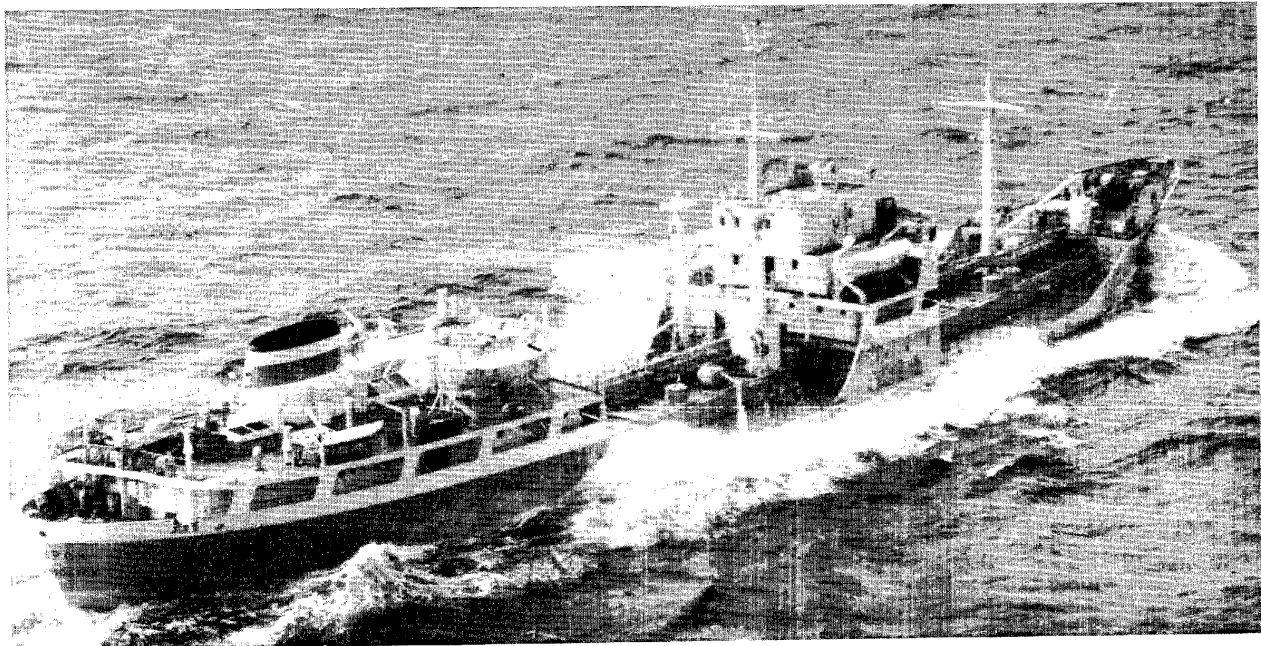


FIGURE 3. THE SOVIET TANKER AMURSK ENROUTE TO HAIPHONG FROM VLADIVOSTOK
IN DECEMBER 1966

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tankers discharged individually and at intervals in the previous three months. All four tankers apparently discharged their cargoes into petroleum barges which moved at night, probably through Haiphong, to the inland waterway system.

Fertilizer imports (from North Korea, Morocco, and the USSR) totaled 29,700 tons -- 11,000 tons more than the average monthly volume of fertilizer deliveries in 1966.

Imports of bulk foods, apparently following a seasonal pattern, remained high for the third consecutive month. These imports totaled 12,300 tons in December, compared with an average monthly volume of 6,400 tons in 1966. In both 1965 and 1966, 45 to 50 percent of the annual volume of seaborne bulk food imports arrived in the last three months of the year.

Imports of miscellaneous and general cargoes, which consisted largely of rolled steel, other metals, and manufactured goods, reached the second highest monthly volume on record.* Of the 44,500 tons of incoming general cargoes identified in December, 86 percent were shipped from Communist countries -- 17,700 tons from Communist China,** 10,400 tons from the USSR, 7,300 tons from Eastern European countries, and 3,000 tons from North Korea. Soviet deliveries of general cargo averaged 14,300 tons a month in 1966 and 9,600 tons in 1965.

Exports carried from North Vietnam by foreign ships in December totaled 86,600 tons, compared with an average monthly volume of 92,800 tons in 1966. The below-average volume of exports resulted primarily from a decline in coal shipments. Coal exports amounted to only 60,900 tons in December, whereas more than 75,000 tons were exported in October and November. An airstrike against Cam Pha in mid-November may have been responsible for the decline in shipments from that port, but the decline in shipments from Hon Gay is unexplained. Japan received 33,900 tons of the December shipments, and the remaining 27,000 tons went to Communist China.

* Since January 1965 the record monthly volume of miscellaneous and general cargoes delivered to North Vietnam by foreign ships was 50,500 tons in July 1966.

** Because little is known of the cargoes carried to North Vietnam by Chinese Communist ships, actual seaborne shipments from China were probably significantly greater.

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A Soviet ship was used to carry coal to Haiphong from Cam Pha or Hon Gay in December, the fourth time in as many months. This procedure is estimated to have replaced the full-time services of ten standard 150-foot, 400-ton-capacity coal barges, which currently are in tight supply as a result of losses to US airstrikes.

Exports of miscellaneous and general cargoes and pig iron were more than double the average monthly volumes of these exports in 1966, with volumes of 13,600 tons and 7,000 tons, respectively, shipped in December. Exports of cement totaled 5,000 tons, compared with an average monthly volume of 7,500 tons in 1966. No apatite was shipped.

IV. Comparison of Foreign Shipping to North Vietnam in 1965 and 1966

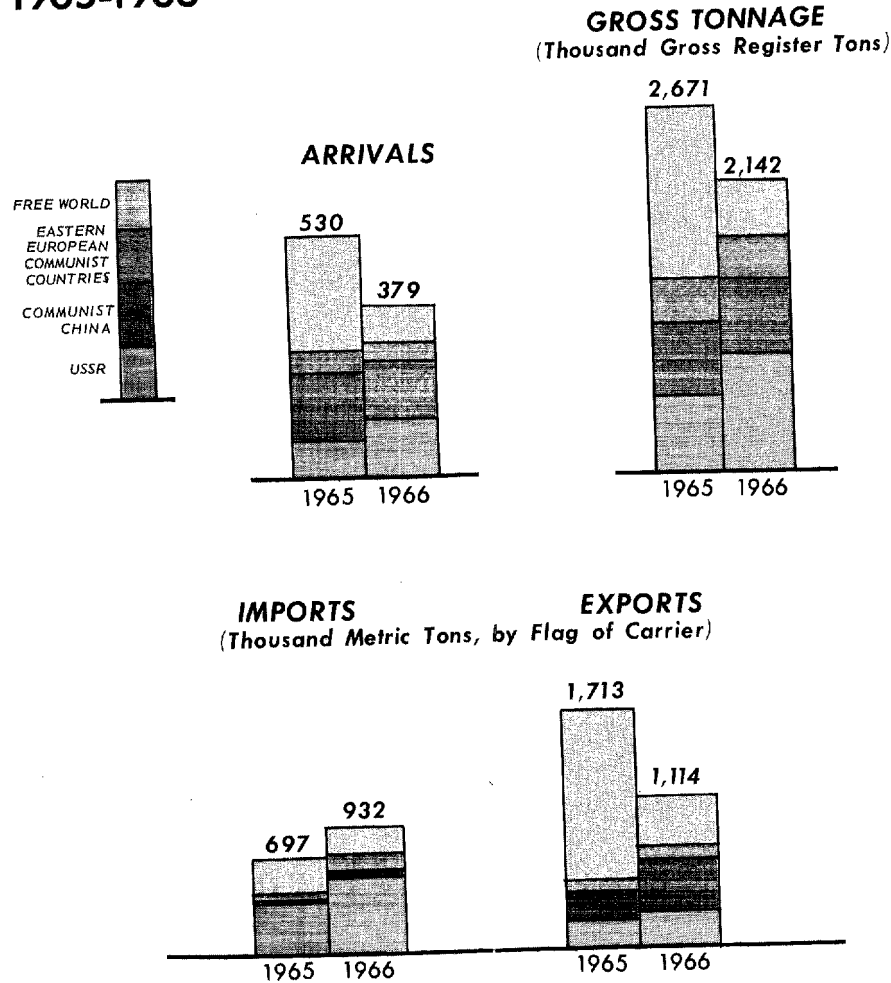
Free World ships made 71 percent fewer calls at North Vietnam in 1966 than in 1965 (see Figure 5). Although this decrease was in part compensated for by a 54-percent increase in calls by Soviet ships and an increase in the average capacity of all foreign ships visiting North Vietnam, there was an overall reduction of 28 percent in foreign ship arrivals as well as a reduction of 20 percent in aggregate gross register tonnage compared with 1965. The reduction in Free World shipping activity is attributable to restrictions imposed by Free World governments following US demarches and to shortages of North Vietnam's principal exports* -- apatite and coal -- which had been transported primarily on Free World ships.

A 15-percent decrease in 1966 in the total volume of seaborne trade carried to and from North Vietnam by foreign ships was the net result of a 34-percent increase in the volume of identified import cargoes and a 35-percent decrease in the volume of identified export cargoes. The major increase in imports occurred in shipments of miscellaneous and general cargoes from Communist countries -- a category encompassing most economic aid goods as well as military support materiel such as transport and construction equipment. Communist countries bore the brunt of the cutbacks in seaborne exports of apatite (to Eastern Europe, Communist China, and North Korea), but the reductions in coal exports were divided between Free World and Communist countries (primarily Japan, Cuba, and China).

* The shortages resulted from damage inflicted upon selected targets in North Vietnam by US airstrikes.

Figure 5

Foreign Shipping to North Vietnam 1965-1966



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Although Chinese Communist and Eastern European shipping to North Vietnam declined slightly in both numbers and capacity in 1966, the shipping of all principal Communist areas -- Soviet, Chinese, and Eastern European -- registered significant gains in identified cargo volumes, both inbound and outbound. Communist ships in 1966 supplanted Free World ships as the principal carriers of North Vietnamese exports and carried at least 72 percent* of North Vietnam's seaborne trade.

* The actual proportion was higher because of an additional but undetermined volume of cargoes discharged at North Vietnam by Chinese ships.

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Table 1

North Vietnam: Foreign-Flag Ship Arrivals ^{a/}
 December 1966, January-December 1966, and January-December 1965

Flag	December 1966		1966		1965	
			January-December		January-December	
	Number	Percent	Number	Percent	Number	Percent
Total	<u>38</u>	<u>100.0</u>	<u>379</u>	<u>100.0</u>	<u>530</u>	<u>100.0</u>
Communist countries	<u>34</u>	<u>89.5</u>	<u>305</u>	<u>80.5</u>	<u>274</u>	<u>51.7</u>
USSR	12	31.6	122	32.2	79	14.9
Eastern Europe	6	15.8	44	11.6	50	9.4
Albania			2	0.5	1	0.2
Bulgaria	2	5.3	9	2.4	5	0.9
Czechoslovakia					4	0.8
Poland	4	10.5	33	8.7	40	7.5
Communist China	16	42.1	138	36.4	144	27.2
Cuba			1	0.3	1	0.2
Free World	<u>4</u>	<u>10.5</u>	<u>74</u>	<u>19.5</u>	<u>256</u>	<u>48.3</u>
Cyprus	1	2.6	12	3.2	3	0.6
Greece			7	1.8	28	5.3
Italy			1	0.3	1	0.2
Malta			4	1.1	2	0.4
United Kingdom	3	7.9	50	13.2	136	25.6
France					2	0.4
Japan					37	7.0
Lebanon					9	1.7
Liberia					3	0.6
Netherlands					5	0.9
Norway					29	5.4
Panama					1	0.2

a. Because of rounding, components may not add to the totals shown.

Table 2

North Vietnam: Tonnage of Foreign-Flag Ship Arrivals ^{a/}
 December 1966, January-December 1966, and January-December 1965

Flag	December 1966		1966		1965	
	Number	Thousand Gross Register Tons	January-December		January-December	
			Number	Thousand Gross Register Tons	Number	Thousand Gross Register Tons
Total	<u>38</u>	<u>211.4</u>	<u>379</u>	<u>2,141.8</u>	<u>530</u>	<u>2,671.1</u>
Communist countries	<u>34</u>	<u>182.4</u>	<u>305</u>	<u>1,708.8</u>	<u>274</u>	<u>1,420.9</u>
USSR	12	71.7	122	851.5	79	529.2
Eastern Europe	6	42.4	44	325.7	50	345.4
Communist China	16	68.3	138	521.9	144	536.5
Cuba			1	9.7	1	9.7
Free World	<u>4</u>	<u>29.0</u>	<u>74</u>	<u>433.0</u>	<u>256</u>	<u>1,250.1</u>

a. The aggregate tonnage of ships calling is not necessarily correlative to the actual volume of cargoes moving into and out of North Vietnam, but these data are of value as indications of relative changes in the volume of shipping. Because of rounding, components may not add to the totals shown.

Table 3

North Vietnam: Identified Imports Carried by Foreign-Flag Ships a/
December 1966, January-December 1966, and January-December 1965

Flag	December 1966					Thousand Metric Tons	
	Ammonium Sulfate and Other Fertilizers	Petroleum	Bulk Foodstuffs	Miscellaneous	Total	1966	1965
						January-December	January-December
Total	<u>29.7</u>	<u>24.2</u>	<u>12.3</u>	<u>44.5</u>	<u>110.8</u>	<u>932.0</u>	<u>697.1</u>
Communist countries	<u>19.7</u>	<u>24.2</u>	<u>6.9</u>	<u>26.9</u>	<u>77.8</u>	<u>716.5</u>	<u>448.7</u>
USSR	8.1	24.2	2.7	13.5	48.5	538.4	385.2
Eastern Europe	5.5	Negl.		11.3	16.9	112.2	46.6
Communist China b/	6.1		4.2	2.1	12.4	61.9	16.8
Cuba						4.0	
Free World	<u>10.0</u>	<u>0</u>	<u>5.4</u>	<u>17.6</u>	<u>33.0</u>	<u>215.6</u>	<u>248.4</u>

a. Identified imports include some estimates of bulk cargoes, using methods which have proved to be highly reliable. Because of rounding, components may not add to the totals shown.

b. An additional unknown quantity of imports may have been carried by Chinese Communist ships.

Table 4

North Vietnam: Identified Exports Carried by Foreign-Flag Ships a/
 December 1966, January-December 1966, and January-December 1965

Thousand Metric Tons

Flag	December 1966					1966	1965
	Coal	Cement	Pig Iron	Miscel- laneous	Total	January-December	January-December
Total	<u>60.9</u>	<u>5.0</u>	<u>7.0</u>	<u>13.6</u>	<u>86.6</u>	<u>1,114.0</u>	<u>1,713.1</u>
Communist countries	<u>50.5</u>	<u>0</u>	<u>7.0</u>	<u>13.5</u>	<u>71.0</u>	<u>756.0</u>	<u>455.0</u>
USSR	23.5		0.1	7.8	31.4	269.0	172.7
Eastern Europe			6.9	5.7	12.5	130.7	90.0
Communist China <u>b/</u>	27.0			0.1	27.1	347.2	183.8
Cuba						9.0	8.5
Free World	<u>10.4</u>	<u>5.0</u>	<u>0</u>	<u>0.1</u>	<u>15.5</u>	<u>358.0</u>	<u>1,258.0</u>

a. Identified exports include some estimates of bulk cargoes, using methods which have proved to be highly reliable. Because of rounding, components may not add to the totals shown.
 b. An additional unknown quantity of exports may have been carried by Chinese Communist ships.

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Table 5

North Vietnam: Identified Imports Carried by Foreign-Flag Ships, by Origin and Commodity a/
January-December 1966 and January-December 1965

Thousand Metric Tons

Origin	January-December 1966						January-December 1965					
	Ammonium Sulfate and Other Fertilizers	Petroleum	Grain and Other Foodstuffs	Timber	Miscellaneous	Total	Ammonium Sulfate and Other Fertilizers	Petroleum	Grain and Other Foodstuffs	Timber	Miscellaneous	Total
Total	<u>224.3</u>	<u>200.8</u>	<u>77.1</u>	<u>13.6</u>	<u>416.2</u>	<u>932.0</u>	<u>162.4</u>	<u>170.2</u>	<u>118.6</u>	<u>14.5</u>	<u>231.4</u>	<u>697.1</u>
Communist countries	<u>176.9</u>	<u>200.8</u>	<u>65.3</u>	<u>0</u>	<u>373.8</u>	<u>816.7</u>	<u>118.2</u>	<u>170.2</u>	<u>59.0</u>	<u>0</u>	<u>201.7</u>	<u>549.1</u>
USSR	117.8	198.2	6.4		171.1	493.5	78.5	154.8	0.7		114.9	348.9
Eastern Europe	16.0	2.6			66.0	84.5	9.0	2.0	20.4		14.2	45.6
Communist China <u>b/</u>			37.2		118.7 <u>c/</u>	155.9		13.4	17.1		67.3 <u>c/</u>	97.7
North Korea	43.0				18.0	61.0	30.7				5.1	35.8
Cuba			21.7			21.7			20.8		0.2	21.0
Free World	<u>47.4</u>	<u>0</u>	<u>11.9</u>	<u>13.6</u>	<u>42.4</u>	<u>115.3</u>	<u>44.2</u>	<u>0</u>	<u>59.6</u>	<u>14.5</u>	<u>29.7</u>	<u>148.0</u>
Cambodia			10.0	13.6		23.6			14.5	14.5		29.0
Hong Kong <u>b/</u>					0.03	0.03			0.8		3.5	4.3
Japan	16.9				30.3	47.2	3.4				14.3	17.7
Singapore/Malaysia			1.9		8.1	9.9			10.0		5.3	15.3
Western Europe	20.1				4.0	24.2	40.8		24.3		1.4	66.5
Other	10.4				0.04	10.4			10.0		5.2	15.2

a. Because of rounding, components may not add to the totals shown.

b. An additional volume of imports, estimated at 150,000 tons each year, was carried from Hong Kong and South China by Chinese Communist and North Vietnamese ships.

c. Total includes 38,800 tons of coking coal in 1966 and 12,700 tons in 1965.

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Table 6

North Vietnam: Identified Exports Carried by Foreign-Flag Ships, by Destination and Commodity a/
January-December 1966 and January-December 1965

Thousand Metric Tons

Destination	January-December 1966						January-December 1965					
	Coal	Apatite	Cement	Pig iron	Miscel- laneous	Total	Coal	Apatite	Cement	Pig Iron	Miscel- laneous	Total
Total	<u>905.7</u>	<u>10.4</u>	<u>90.4</u>	<u>39.6</u>	<u>67.8</u>	<u>1,114.0</u>	<u>1,150.1</u>	<u>317.5</u>	<u>78.4</u>	<u>47.5</u>	<u>119.5</u>	<u>1,713.1</u>
Communist countries	<u>488.7</u>	<u>10.4</u>	<u>7.2</u>	<u>1.5</u>	<u>37.2</u>	<u>545.1</u>	<u>611.6</u>	<u>317.5</u>	<u>10.5</u>	<u>0</u>	<u>72.1</u>	<u>1,011.7</u>
USSR					11.6	11.6					42.8	42.8
Eastern Europe					16.1	16.1	10.3	183.5			14.6	208.4
Communist China <u>b/</u>	471.6	2.5	5.0	1.5	6.7	487.3	495.1	89.2	10.5		12.2	607.1
North Korea		7.9	2.2		1.3	11.4	11.8	44.8			1.6	58.2
Cuba	17.1				1.5	18.7	94.3				0.9	95.2
Free World	<u>417.0</u>	<u>0</u>	<u>83.1</u>	<u>38.2</u>	<u>30.5</u>	<u>568.8</u>	<u>538.6</u>	<u>0</u>	<u>67.9</u>	<u>47.5</u>	<u>47.4</u>	<u>701.4</u>
Cambodia			44.1		7.6	51.8			36.3		4.4	40.7
Hong Kong <u>b/</u>	4.4		11.0	0.6	8.6	24.6	11.4		6.6		14.0	32.1
Japan	346.9		7.0	36.1	3.4	393.4	443.1			37.3	10.7	491.2
Singapore/Malaysia	4.0		11.2	1.5	7.8	24.5	16.5		15.0	0.2	6.4	38.0
Western Europe	61.7				2.8	64.4	67.5		10.0		3.7	81.2
Other			9.8		0.3	10.0				10.0	8.2	18.2

a. Because of rounding, components may not add to the totals shown.

b. An additional volume of exports, estimated at 50,000 tons each year, was carried to Hong Kong and South China by Chinese Communist and North Vietnamese ships.

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