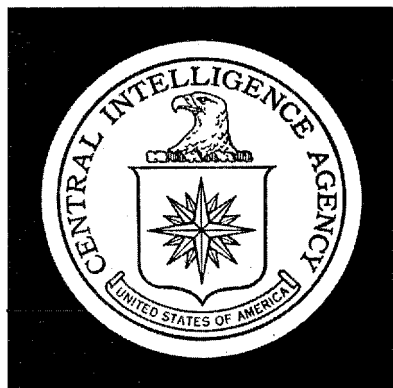


Secret



DIRECTORATE OF
INTELLIGENCE

Intelligence Memorandum

Foreign Shipping to North Vietnam in June 1967

Secret

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SECRETForeword

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 (including Albanian) ship arrivals and cargoes and on Free World arrivals are not likely to be changed significantly. To reflect these changes a table showing monthly arrivals by flag is included in this memorandum. All data on cargoes carried are expressed in metric tons.

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CENTRAL INTELLIGENCE AGENCY
Directorate of Intelligence

INTELLIGENCE MEMORANDUM

Foreign Shipping to North Vietnam
in June 1967

Summary

A record high volume of identified deliveries from Communist China kept North Vietnam's seaborne imports at a high level in June despite a large decline in shipments from the USSR. Imports of miscellaneous and general cargoes and cargoes delivered by Free World ships also reached record high volumes. Imports of foodstuffs continued at a very high level, but petroleum imports were unusually small. Seaborne exports remained small because of earlier bomb damage to coal-processing, cement, and pig iron plants.

Total calls by foreign ships decreased appreciably (see the chart, Figure 1) because of the sharp drop in calls by Soviet ships, as shown in the following breakdown of arrivals:

Note: This memorandum was produced by CIA. It was prepared by the Office of Economic Research, 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 25 July 1967. For data on foreign-flag ship arrivals in June, as well as identified imports and exports carried on foreign-flag ships, see Tables 1 through 6.

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<u>Flag</u>	<u>May</u>	<u>June</u>	<u>Monthly Average January-May</u>
Total	<u>40</u>	<u>34</u>	<u>39.6</u>
Communist countries	<u>31</u>	<u>23</u>	<u>34.0</u>
USSR	18	8	19.8
Eastern Europe	2	4	3.4
Communist China	10	11	10.6
Cuba	1		0.2
Free World	<u>9</u>	<u>11</u>	<u>5.6</u>
United Kingdom	7	9	4.6
Other	2	2	1.0

The decrease in Soviet arrivals stemmed from a reduction in loadings at Soviet ports, probably because of heavy congestion at Haiphong. The closure of the Suez Canal had no effect on deliveries to North Vietnam in June, but has delayed at least nine Communist-flag ships still en route, which will arrive in late July and early August. These delays will permit the North Vietnamese to reduce at least temporarily the backlog of ships awaiting unloading at Haiphong.

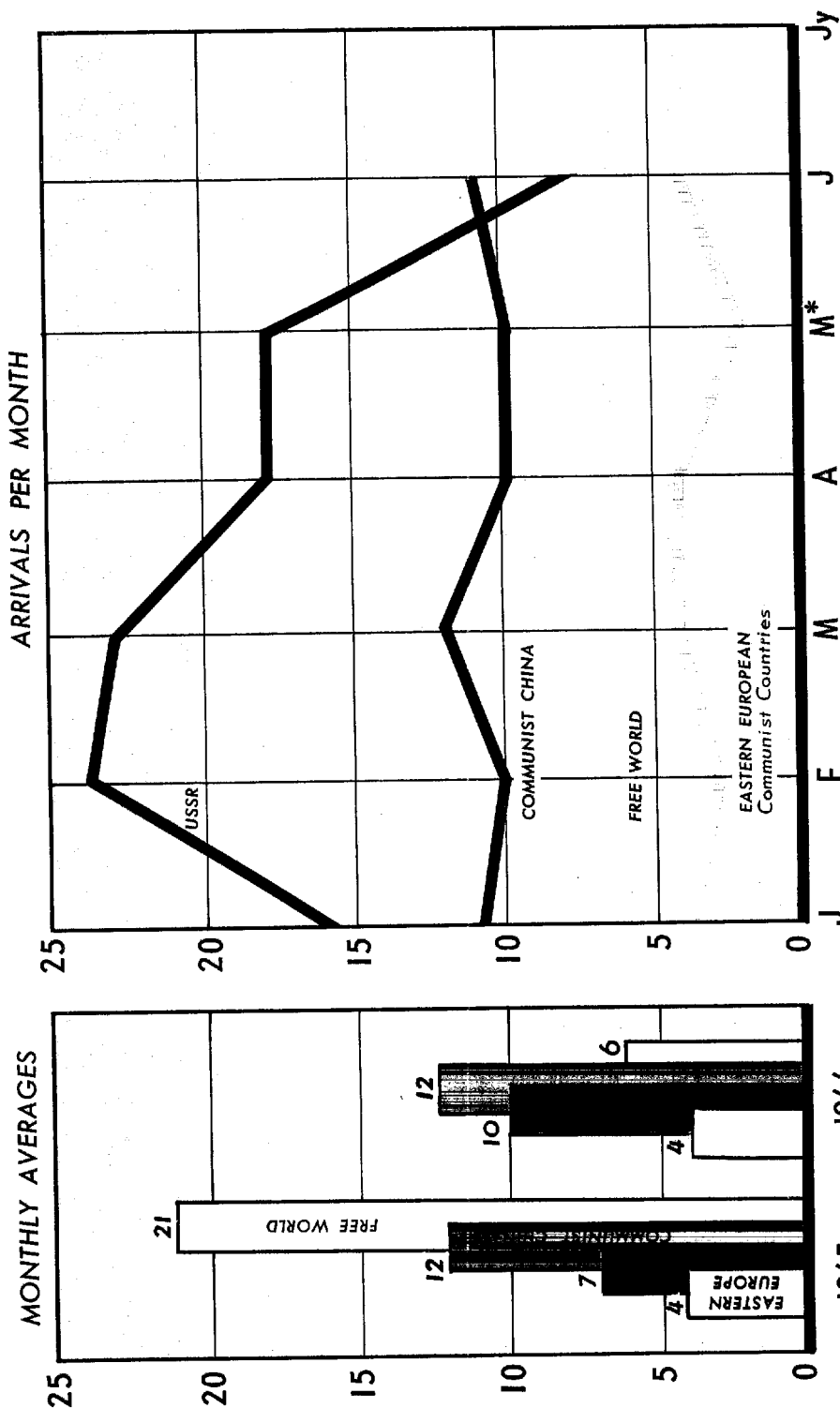
A comparison of the first half of 1966 with the first half of 1967 reveals almost no change in the total volume of seaborne trade, because a sharp reduction in exports offset a 59-percent increase in imports. Arrivals of foreign ships increased 13 percent, but their total gross tonnage declined 6 percent. Calls by Free World ships fell from 54 to 39, but calls by Soviet ships increased 70 percent to 107. Imports from Free World countries shrank from 13 percent to 4 percent of total seaborne imports.

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Figure 1

North Vietnam: Foreign Ship Arrivals

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* Excluding One Cuban Ship

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Congestion at Haiphong

1. An average monthly volume of 142,900 tons of seaborne imports in the period March-June has taxed Haiphong's port facilities and caused increasing delays to shipping. In June the average time in port of ships which delivered more than 7,000 tons of dry cargo was more than double that for the first quarter of this year, as shown in the tabulation below:

	Average Number of Days in Port of Foreign Freighters Departing from Haiphong				
	<u>1966</u>	<u>1967</u>			
	<u>January- December</u>	<u>January- March</u>	<u>April</u>	<u>May</u>	<u>June</u>
All dry cargo ships	13	12	12	17	22
Ships that delivered more than 7,000 tons of dry cargo	21	19	21	28	43

This average should decrease in July because of a decline in Soviet shipments from the Black Sea and because the arrival of a few ships will be delayed until the second half of the month by the closure of the Suez Canal.

Free World Shipping

2. Eleven Free World ships called at North Vietnam in June. They delivered 57,900 tons of identified cargo, the largest monthly volume of imports carried to North Vietnam on Free World ships in at least the past 2-1/2 years. Nine were British-flag ships owned by Hong Kong shipping companies and chartered to Communist China. All nine delivered cargoes from China, including a 7,000-ton shipment of bulk petroleum. A Cypriot-flag ship brought sugar from Cuba, and an Italian ship carried miscellaneous and general cargoes from North Korea. Both were under charter to North

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Vietnam. Five Free World ships departed from North Vietnam in June, four in ballast and one with coal for Hong Kong and Japan.

Communist Shipping

3. Soviet ships arriving at North Vietnam in June made the fewest calls (eight) and delivered the smallest volume of identified cargo (40,500 tons) since November 1966.* Three dry cargo ships from the Black Sea accounted for most of the cargo (see the photograph, Figure 2). Four freighters

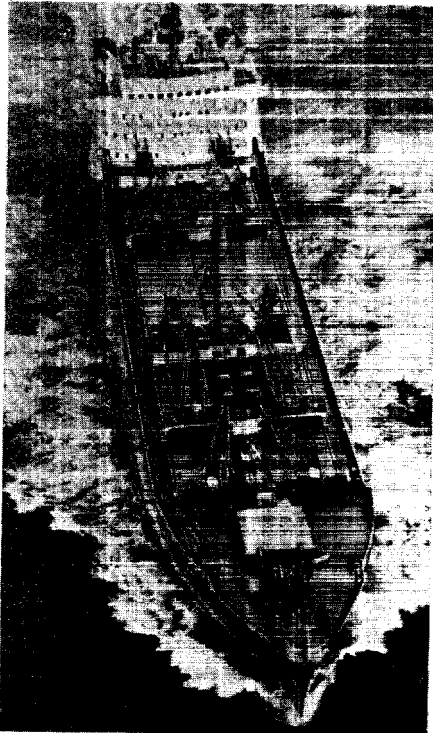


FIGURE 2. THE SOVIET SHIP BAYMAK (11,081 GROSS REGISTER TONS) SAILING TO HAIPHONG FROM A BLACK SEA PORT IN JUNE 1967

arrived from Vladivostok, three with wheat flour and one with a few hundred tons of miscellaneous and general cargoes. A single Soviet tanker arrived in June carrying 3,900 tons of petroleum from Vladivostok.

4. The sharp decrease in Soviet arrivals in June stemmed from a cutback in loadings at ports in the Black Sea and the Soviet Far East that probably was intended to reduce the tieup of Soviet shipping in the congested port of Haiphong. There are indications that the slowdown in Soviet loadings will continue through July. The arrival of ships from the Black Sea will be delayed about 16 days because of the longer voyage around

* In January-May 1967, Soviet ships averaged nearly 20 calls a month, and delivered an average monthly volume of 72,000 tons of cargo to North Vietnam.

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Africa caused by the closure of the Suez Canal. This delay should help the North Vietnamese to reduce at least temporarily the backlog of ships waiting in Haiphong to be unloaded.

5. Fourteen Soviet ships sailed from North Vietnam in June. Seven, including a tanker, left in ballast, three freighters under charter to North Vietnam carried coal to Japan, two departed with fruit for the Soviet Far East, and two carried miscellaneous and general cargoes for Singapore and Hong Kong.

6. Eastern European-flag ships made four calls. An Albanian-flag ship, the first to call at North Vietnam since September 1966, arrived from Communist China. Three Polish-flag ships delivered cargoes from Europe (see the photograph, Figure 3). The Albanian-flag ship and one of the

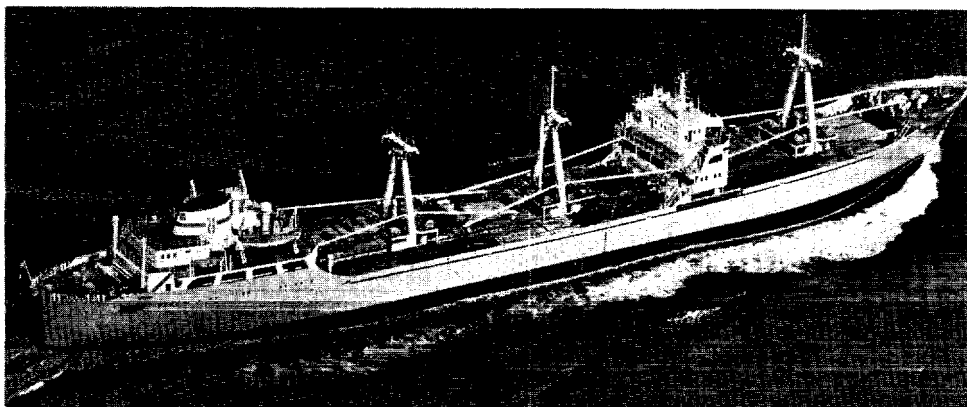


FIGURE 3. THE POLISH-FLAG SHIP MONIUSZKO (9,247 GROSS REGISTER TONS) APPROACHING HAIPHONG IN JUNE 1967. THE MONIUSZKO, OPERATING UNDER CHARTER TO THE CHINESE-POLISH SHIPBROKERS COMPANY (CHIPOLBROK), DELIVERED CARGO LOADED IN POLAND AND BULGARIA.

Polish-flag ships are operated by joint shipping companies in which Communist China is a partner.* Three Polish-flag ships sailed from North Vietnam

* The Chinese-Albanian Shipping Co. (Chalship) and the Chinese Polish Shipbrokers Co. (Chipolbrok).

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in June. Two carried general cargoes for Eastern Europe and one sailed to China. A Cuban ship, which had delivered sugar in May, began its homeward voyage with a cargo of coal.

7. Eleven Chinese Communist ships arrived in June. Seven of nine that sailed from China carried import cargoes, principally foodstuffs, and two arrived in ballast to load coal. A Chinese-flag freighter chartered to Chipolbrok delivered a cargo from a Polish port, and another carried a few hundred tons of cargo from Cambodia. Only three of the ten Chinese ships that departed from North Vietnam in June carried cargoes. All three sailed for China, two with small quantities of general cargoes, and one with coal.

Cargoes

8. Identified cargoes delivered to North Vietnam by foreign ships totaled 140,500 tons in June, compared with average monthly volumes of 113,200 tons in the first quarter of this year and 77,100 tons in all of 1966. Shipments of foodstuffs and miscellaneous and general cargoes were exceptionally heavy, but deliveries of petroleum and fertilizer were unusually low. Cargoes from Communist China in June totaled 68,100 tons, compared with an average of 25,100 tons in the five preceding months. No shipments of arms or ammunition were detected.

9. Imports of miscellaneous and general cargoes reached the record volume of 64,600 tons in June. Deliveries from Communist China totaled 25,300 tons and included 9,800 tons of soft coal. Shipments from the USSR and Eastern European countries aggregated 18,400 tons and 15,700 tons, respectively, and included construction equipment, trucks, steel products, textiles, and machinery.

10. Identified imports of foodstuffs in June totaled 59,900 tons, the second highest monthly volume recorded.* Communist China provided

* In May, 69,400 tons of foodstuffs were delivered by sea, compared with a total of 77,600 tons in all of 1966.

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35,900 tons, largely rice. Thirteen thousand tons of wheat flour arrived from the USSR; 10,400 tons of sugar were delivered from Cuba, and nearly 600 tons of various foodstuffs came from Free World countries.

11. Seaborne deliveries of petroleum totaled only 11,000 tons. The June deliveries were made by a British-flag tanker which carried 7,000 tons from Communist China, a Soviet tanker with 3,900 tons from Vladivostok, and a Soviet freighter with 100 tons from a Black Sea port.

12. The low volume of petroleum deliveries in June is largely attributable to the late arrival of one tanker and possibly the diversion of another to China. The Soviet tanker Samarkand, which was scheduled to arrive on 30 June with 10,600 tons of gasoline and diesel oil, arrived on 1 July. Another Soviet tanker, the Peter Shirshov, declared at the Bosphorus for Communist China with 10,700 tons of kerosene, although there had been earlier indications that it would load for North Vietnam. Since 1963 the USSR has delivered petroleum to Chinese Communist ports only when shipments intended for North Vietnam could not be accommodated at Haiphong.* Petroleum handling difficulties resulting from the record high monthly volume of 35,700 tons of petroleum that arrived at North Vietnam by sea in May may have prompted the diversion of the Peter Shirshov. The existence of problems is indicated by the prolonged stay in Haiphong of the Soviet tanker Elbrus, which arrived from the Black Sea late in May with 10,800 tons of petroleum and stayed 31 days, the longest stay at North Vietnam by any tanker since August 1966.** The Elbrus, which arrived with a draft exceeding 29 feet, apparently had to discharge part of its cargo to a smaller Soviet tanker at the Le Goeland anchorage (see the map, Figure 4) before it could negotiate the channel to Haiphong. The shipment that arrived on 1 July apparently was handled in the same manner.

* These shipments presumably were forwarded to North Vietnam.

** A Soviet tanker that arrived with a 10,000-ton shipment in June 1966 was in port about two months.

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13. Imports of fertilizer in June amounted to 5,000 tons, only slightly less than the average of 5,300 tons a month in May and June but far less than the monthly average of 21,700 tons in the first half of 1966 and 25,200 tons in January-April 1967. The decrease does not appear to be the result of seasonal influences and may represent an effort by North Vietnam to defer lower priority imports because of congestion at Haiphong.

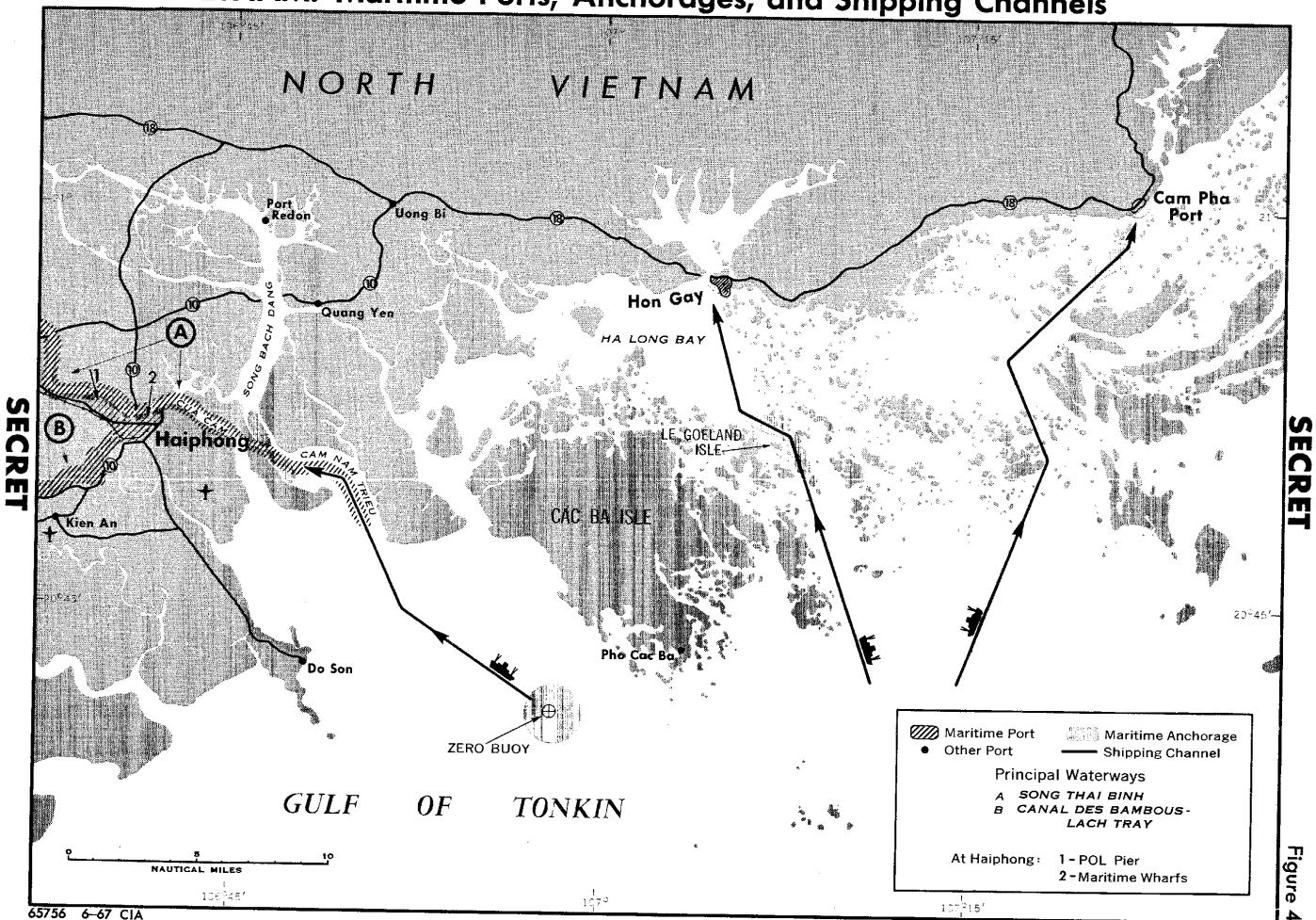
14. Identified seaborne exports in June totaled 47,100 tons, only 7,600 tons more than the record low volume in May. Shipments of coal, cement, and pig iron, North Vietnam's principal exports, continued to show the effects of bomb damage inflicted by the recent air strikes against major industrial facilities. The decline in principal exports is shown in the tabulation below:

	Average Monthly Volume of Seaborne Exports in First Half of 1967 (Thousand Metric Tons)		
	<u>January- March</u>	<u>April- June</u>	<u>June</u>
Total	<u>93.0</u>	<u>43.9</u>	<u>47.1</u>
Coal	69.6	32.1	30.3
Cement	8.9	1.3	0
Pig iron	6.1	1.1	0
Other	8.4	9.4	16.8

The 30,300 tons of coal shipped in June went to Japan (21,800 tons), Cuba (5,000 tons), Communist China (2,700 tons), and Hong Kong (800 tons). One Chinese ship that called for coal at Cam Pha had to depart in ballast apparently because of a lack of coal.

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NORTH VIETNAM: Maritime Ports, Anchorages, and Shipping Channels



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Foreign Shipping to North Vietnam: First Six
Months of 1967 Compared with First Six Months
of 1966

15. The quantity of identified cargoes carried on foreign ships in the first half of this year was virtually unchanged from the first half of 1966 because a 59-percent increase in imports was offset by a 40-percent decrease in exports. Imports of foodstuffs increased 715 percent to 238,100 tons, more than three times the volume for all of 1966. Chinese rice and Soviet wheat flour constituted most of the increased food imports. Imports of miscellaneous and general cargoes, largely industrial goods from the USSR and Eastern Europe, increased 47 percent. Imports from Free World countries continued to decline. A decline in coal shipments accounted for most of the reduction in exports. Shipments of coal to China were drastically reduced but shipments to Japan declined only slightly.

16. Foreign ship arrivals increased 13 percent, but the total gross register tonnage of foreign ships declined by 6 percent. Calls by Free World ships decreased from 54 to 39. Soviet ship arrivals increased 70 percent to 107, but the average size of Soviet ships (including tankers) decreased nearly 32 percent.

17. The principal changes in the two six-month periods are summarized in the following tabulation and in greater detail in Tables 5 and 6:

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	<u>Half-Year Periods</u>		<u>Change</u>	
	<u>1966</u>	<u>1967</u>	<u>Absolute</u>	<u>Percent</u>
	<u>Arrivals</u>			
Foreign ship arrivals	205	232	+27	+13
Of which:				
Free World ships	54	39	-15	-28
Soviet ships	63	107	+44	+70
	<u>Thousand Tons</u>			
Gross register tons of foreign ship arrivals	1,205.5	1,135.2	-70.3	-6
Of which:				
Soviet ships	458.2	534.9	+76.7	+17
Free World ships	303.1	187.2	-115.9	-38
Seaborne cargo on foreign ships	1,171.7	1,180.0	+8.3	+1
Of which:				
On Free World ships	396.0	207.5	-188.5	-48
On Soviet ships	429.8	594.6	+164.8	+38
Seaborne imports on foreign ships	484.3	769.0	+284.7	+59
Of which:				
Foodstuffs	29.2	238.1	+208.9	+715
Miscellaneous and general cargoes	182.3	268.8	+86.5	+47
From Communist countries	420.0	735.0	+315.0	+75
Seaborne exports on foreign ships	687.4	411.0	-276.4	-40
Of which:				
Soviet ships	139.7	194.1	+54.4	+39
Free World ships	281.1	46.3	-234.8	-84

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Table 1
 North Vietnam: Foreign-Flag Ship Arrivals
 January-June 1966-67

Flag	1967						January-June		January-June 1966	
	January	February	March	April	May	June	Number	Percent	Number	Percent ^{a/}
Total	<u>37</u>	<u>42</u>	<u>42</u>	<u>37</u>	<u>40</u>	<u>34</u>	<u>232</u>	<u>100</u>	<u>205</u>	<u>100</u>
Communist Countries	<u>31</u>	<u>37</u>	<u>39</u>	<u>32</u>	<u>31</u>	<u>23</u>	<u>193</u>	<u>83</u>	<u>151</u>	<u>74</u>
USSR	16	24	23	18	18	8	107	46	63	31
Eastern Europe	4	3	4	4	2	4	21	9	19	9
Albania						1	1	Negl.		
Bulgaria	2	1	1				4	2	3	1
Poland	2	2	3	4	2	3	16	7	16	8
Communist China	11	10	12	10	10	11	64	28	68	33
Cuba					1		1	Negl.	1	Negl.
Free World	<u>6</u>	<u>5</u>	<u>3</u>	<u>5</u>	<u>9</u>	<u>11</u>	<u>39</u>	<u>17</u>	<u>54</u>	<u>26</u>
Cyprus		1		1	1	1	4	2	6	3
Greece									7	3
Italy						1	1	Negl.	1	Negl.
Malta		1			1		2	1	2	1
United Kingdom	6	3	3	4	7	9	32	14	38	19

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

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Table 2

North Vietnam: Tonnages of Foreign-Flag Ship Arrivals ^{a/}
 May, June, January-June 1967 and January-June 1966

Type of Ship and Flag	1967						January-June 1966	
	May		June		January-June		Number	Thousand Gross Register Tons
	Number	Thousand Gross Register Tons	Number	Thousand Gross Register Tons	Number	Thousand Gross Register Tons		
Total	<u>40</u>	<u>182.2</u>	<u>34</u>	<u>183.9</u>	<u>232</u>	<u>1,135.2</u>	<u>205</u>	<u>1,205.5</u>
Dry cargo	34	154.9	32	175.0	205	1,028.7	188	1,098.4
Tanker	6	27.3	2	9.0	27	106.5	17	107.2
Communist countries	<u>31</u>	<u>145.4</u>	<u>23</u>	<u>126.5</u>	<u>193</u>	<u>948.0</u>	<u>151</u>	<u>902.4</u>
USSR	18	86.8	8	51.9	107	534.9	63	458.2
Eastern Europe	2	15.7	4	31.4	21	165.4	19	142.7
Communist China	10	33.5	11	43.3	64	238.3	68	291.8
Cuba	1	9.5			1	9.5	1	9.7
Free World	<u>9</u>	<u>36.8</u>	<u>11</u>	<u>57.4</u>	<u>39</u>	<u>187.2</u>	<u>54</u>	<u>303.1</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.

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Table 3

North Vietnam: Identified Imports Carried by Foreign-Flag Ships a/
June 1967 and January-June 1966-67

Flag	June 1967						Thousand Metric Tons	
	Ammonium Sulfate and Other Fertilizers	Petroleum	Bulk Foodstuffs	Miscellaneous	Total	January-June		
						1967	1966	
Total	<u>5.0</u>	<u>11.0</u>	<u>59.9</u>	<u>64.6</u>	<u>140.5</u>	<u>769.0</u>	<u>484.3</u>	
Communist countries	<u>5.0</u>	<u>4.0</u>	<u>36.2</u>	<u>37.4</u>	<u>82.6</u>	<u>607.8</u>	<u>369.4</u>	
USSR	5.0	4.0	13.0	18.4	40.5	400.5	290.1	
Eastern Europe			0.4	11.4	11.8	65.0	41.4	
Communist China <u>b/</u>			22.8	7.6	30.3	130.1	33.8	
Cuba						12.2	4.0	
Free World	<u>0</u>	<u>7.0</u>	<u>23.7</u>	<u>27.2</u>	<u>57.9</u>	<u>161.2</u>	<u>114.9</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.

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Table 4

North Vietnam: Identified Exports Carried by Foreign-Flag Ships a/
June 1967 and January-June 1966-67

Flag	Thousand Metric Tons					
	June 1967				January-June	
	Coal	Pig Iron	Miscellaneous	Total	1967	1966
Total	<u>30.3</u>	<u>0</u>	<u>16.8</u>	<u>47.1</u>	<u>411.0</u>	<u>687.5</u>
Communist countries	<u>19.8</u>	<u>0</u>	<u>16.8</u>	<u>36.6</u>	<u>364.7</u>	<u>406.3</u>
USSR	12.1		10.5	22.6	194.1	139.7
Eastern Europe			2.0	2.0	46.6	54.4
Communist China	2.7		3.9	6.6	118.6	203.2
Cuba	5.0		0.4	5.4	5.4	9.0
Free World	<u>10.5</u>	<u>0</u>	<u>0</u>	<u>10.5</u>	<u>46.3</u>	<u>281.1</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.

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Table 5

North Vietnam: Identified Imports Carried by Foreign-Flag Ships, by Origin and Commodity ^{a/}
January-June 1967 and January-June 1966

Thousand Metric Tons

Origin	January-June 1967						January-June 1966					
	Ammonium Sulfate and Other Fertilizer	Petroleum	Grain and Other Foodstuffs	Timber	Miscellaneous	Total	Ammonium Sulfate and Other Fertilizer	Petroleum	Grain and Other Foodstuffs	Timber	Miscellaneous	Total
Total	<u>111.6</u>	<u>142.3</u>	<u>238.1</u>	<u>8.1</u>	<u>268.8</u>	<u>769.0</u>	<u>130.6</u>	<u>132.3</u>	<u>29.2</u>	<u>9.9</u>	<u>182.3</u>	<u>484.3</u>
Communist countries	<u>107.6</u>	<u>142.3</u>	<u>222.2</u>	<u>0</u>	<u>263.0</u>	<u>735.0</u>	<u>94.7</u>	<u>132.3</u>	<u>28.1</u>	<u>0</u>	<u>164.9</u>	<u>420.0</u>
USSR	81.7	109.6	69.4		110.2	370.9	68.5	131.3	0.6		65.0	265.3
Eastern Europe	14.0	1.2	21.0		74.3	110.3	16.0	1.0			26.8	43.8
Communist China ^{b/}		31.5	90.3		71.9	193.7			14.9		73.2	88.0
North Korea	11.9				6.6	18.4	10.2					10.2
Cuba			41.6			41.6			12.7			12.7
Free World	<u>4.0</u>	<u>0</u>	<u>16.0</u>	<u>8.1</u>	<u>6.0</u>	<u>34.1</u>	<u>35.9</u>	<u>0</u>	<u>1.0</u>	<u>9.9</u>	<u>17.4</u>	<u>64.3</u>
Cambodia			14.0	8.1	0.4	22.5				9.9		9.9
Hong Kong					0.6	0.6						
Japan					1.9	1.9	15.8				13.6	29.3
Singapore/Malaysia			1.7		2.2	3.9			1.0		3.7	4.7
Western Europe			0.2		0.9	1.1	20.2				0.2	20.3
Other	4.0					4.0						

a. 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.

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Table 6

North Vietnam: Identified Exports Carried by Foreign-Flag Ships, by Destination and Commodity a/
January-June 1967 and January-June 1966

Thousand Metric Tons

Destination	January-June 1967						January-June 1966					
	Coal	Apatite	Cement	Pig Iron	Miscel- laneous	Total	Coal	Apatite	Cement	Pig Iron	Miscel- laneous	Total
Total	<u>305.1</u>	<u>0</u>	<u>30.8</u>	<u>21.5</u>	<u>53.5</u>	<u>411.0</u>	<u>595.6</u>	<u>0</u>	<u>61.1</u>	<u>1.4</u>	<u>29.3</u>	<u>687.4</u>
Communist countries	<u>124.9</u>	<u>0</u>	<u>2.0</u>	<u>0</u>	<u>21.9</u>	<u>148.7</u>	<u>349.0</u>	<u>0</u>	<u>3.0</u>	<u>0.5</u>	<u>13.4</u>	<u>365.9</u>
USSR					9.1	9.1					6.3	6.3
Eastern Europe					6.1	6.1					5.1	5.1
Communist China	119.9		2.0		4.4	126.2	331.9		3.0	0.5	1.3	336.7
North Korea					1.9	1.9					0.7	17.8
Cuba	5.0				0.4	5.4	17.1					
Free World	<u>180.2</u>	<u>0</u>	<u>28.8</u>	<u>21.5</u>	<u>31.7</u>	<u>262.2</u>	<u>246.6</u>	<u>0</u>	<u>58.1</u>	<u>1.0</u>	<u>15.8</u>	<u>321.5</u>
Cambodia			24.6			24.6			34.4		9.0	43.5
Hong Kong	2.0		4.1	2.0	22.2	30.3	3.0		2.0	0.1	1.1	6.2
Japan	163.2			19.5	2.2	185.0	181.9		7.0		2.2	191.1
Singapore/Malaysia	7.5				6.1	13.6			5.0	0.8	1.8	7.6
Western Europe	7.5				0.2	7.7	61.7				1.5	63.2
Other					0.9	0.9			9.8		0.2	10.0

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.

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