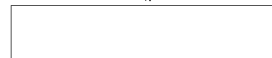


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DIRECTORATE OF
INTELLIGENCE

Intelligence Memorandum

Shipping To North Vietnam During July 1970

~~Secret~~

ER IM 70-123
August 1970

Copy No. 63

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Foreword

All data in this memorandum are preliminary and subject to minor changes as additional information becomes available. Data for the preceding month and monthly averages presented in the tables have been adjusted to reflect corrections and additions. Weights of cargoes are expressed in metric tons. Because of rounding, components may not add to the totals shown.

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CENTRAL INTELLIGENCE AGENCY
Directorate of Intelligence
August 1970

INTELLIGENCE MEMORANDUM

Snipping To North Vietnam During July 1970

Highlights

North Vietnamese seaborne imports fell seasonally in July to 153,000 tons, more than 10% below the monthly average for January-June 1970. A similar decline occurred in July of each of the past four years. Foodstuff and petroleum deliveries fell sharply, but deliveries of general cargo were the highest since June 1968. Imports from the USSR fell to 73,400 tons, the lowest level since September 1969, and deliveries from Communist China also dropped -- to 30,800 tons. These declines were partly offset by large shipments from Eastern Europe, Cuba, and the Free World. Soviet ships delivered 33 tons of probable military aid cargo.

Seaborne exports in July reached 41,000 tons, well above the June total. Shipments of coal, apatite, general and miscellaneous cargo, rice, and cement all rose above their June levels. The delivery of kiln sections for the Haiphong Cement Plant in July should help to increase cement exports in the future.

Dry cargo ship congestion diminished during July as the average number of dry cargo ships in port per day fell from 18 to 14. Arriving tankers, however, faced longer delays than usual, because of a tanker backlog remaining from June and limited lightering capability in Haiphong.

Note: This memorandum was produced solely by CIA. It was prepared by the Office of Economic Research and information on ship arrivals was coordinated with the Naval Intelligence Command.

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Construction continued at the western end of the new extension of the Chamber of Commerce Wharves, and the Hospital Wharf was about half dismantled. Petroleum storage facilities near the marine hospital across the Cua Cam from Haiphong's main petroleum storage facilities have been expanded.

Seasonal Reduction in Imports

1. North Vietnamese seaborne imports in July slipped to 153,000 tons (see Tables 1 and 2), almost 19,000 tons less than in June. This drop was probably influenced by seasonal factors; deliveries have been lower in July than in June during each year since 1965, as shown in the accompanying tabulation.

Year	Thousand Metric Tons					
	July		June		Monthly Average First Half	
	Total	Food	Total	Food	Total	Food
1965	62.1	15.5	46.5	6.2	53.1	10.2
1966	80.7	6.3	86.7	14.1	80.6	4.9
1967	72.0	24.8	141.9	59.9	139.1	40.5
1968	152.0	72.0	218.4	85.9	175.5	61.9
1969	135.4	59.9	163.7	81.5	164.4	78.5
1970	153.0	33.1	171.7	53.5	171.2	64.1

Imports of foodstuffs plunged to 33,100 tons, their lowest level since September 1969, and would have been even lower had it not been for one of the infrequent deliveries of sugar (11,600 tons) from Cuba. Foodstuff shipments from the USSR (16,700 tons) and Communist China (4,300 tons) dropped to their lowest levels in 22 and 29 months, respectively. The decline in foodstuff imports may indicate that North Vietnam's fifth-month rice harvest was better than in 1969.

SECRETPetroleum and Fertilizer Deliveries

2. Imports of petroleum dropped to 33,500 tons, well below those in June but only slightly below the monthly average during the first half. Nearly 21,000 tons originated in Soviet Black Sea ports and were transported by Soviet tankers possibly intended for summer utilization along the Northern Sea Route. At the end of July there were no Soviet tankers en route to Haiphong from the Black Sea or the Soviet Far East, indicating a substantial additional drop in petroleum deliveries in August.

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3. Fertilizer deliveries rose slightly to 16,300 tons. About 7,500 tons of urea arrived from Japan, the largest shipment from there in 1970.

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Another 2,000 tons of urea was delivered from Eastern Europe. Shipments of ammonium sulfate from the USSR fell 49% to 6,800 tons and there were no deliveries from North Korea.

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Large General Cargo Deliveries

4. Imports of general and miscellaneous cargo jumped to their highest level since June 1968. This increase was caused by large deliveries from Eastern Europe (24,900 tons) and Communist China (26,500 tons), the highest in 17 and 26 months, respectively. From Eastern Europe, one Chinese and three Polish ships transported steel, machinery, trucks, barges, pharmaceuticals, soap, chemicals, and cranes. One Polish ship also delivered 1,600 tons of explosives; most of it is probably for mining. The general and miscellaneous cargo from China was largely unidentified but probably included some foodstuffs. Deliveries of general cargo from the USSR fell as Soviet dry cargo arrivals from Black Sea ports declined from five in June to three in July. Three Soviet ships, the *Minsk*, the *Murom*, and the *Boris Gorbatov*, delivered 33 tons of unidentified cargo which is probably military aid but not arms or ammunition.

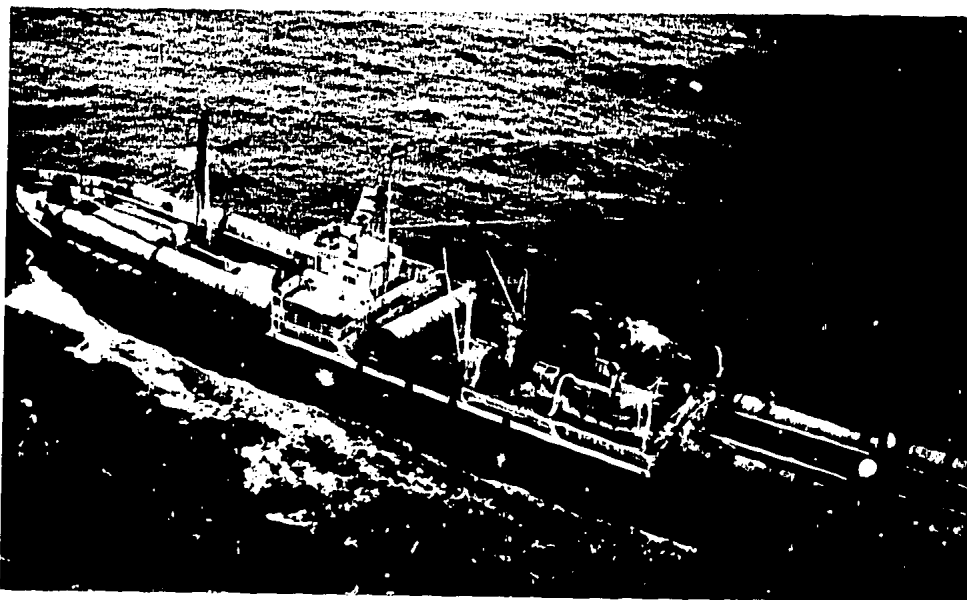
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Exports Rise

5. Seaborne exports in July rose sharply to 41,000 tons, but remained slightly below the monthly average during the first half (see Tables 3 and 4). Coal exports rose to 17,300 tons, but remained well below the monthly average during the first half; 11,700 tons was shipped to Japan, 4,000 tons to China, and the remainder to Eastern Europe. Apatite exports of 13,400 tons were the highest since they were resumed in August 1969 and went to China and North Korea. Rice shipments of 4,400 tons to Hong Kong, Malaysia, and Singapore were slightly above their previous high for 1970 recorded in June.

Cement

6. Cement shipments amounted to a meager 900 tons. However, the arrival of nine rotary kiln sections aboard the Cypriot flag ship *Buonavia* (see the photograph)



may portend increased exports of cement. These new kilns will probably be used in reconstructing the Haiphong Cement Plant, which has been in partial operation since June 1968. If the new kiln sections are sufficient to complete restoration, the plant could achieve its prebombing capacity of 700,000 tons a year in about six months.

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Arrivals

7. Thirty-nine ships from foreign ports arrived in North Vietnam during July, one less than in the previous month (see Table 5). Soviet arrivals fell to 15, the lowest number since September 1969. North Vietnamese arrivals rose to seven, the highest number thus far in 1970. Except for one Free World ship which called in Hon Gai, all ships came to Haiphong.

Congestion in Haiphong

8. Dry cargo ship congestion at Haiphong was virtually eliminated during July. The average number of foreign dry cargo ships in port per day fell to 14 from 18 in June. The average layover time for departing dry cargo ships, however, remained unchanged at 17 days (see Tables 6 and 7).

9. Tanker congestion, while mild by standards for dry cargo ships at Haiphong, continued in July and was the worst of any month in 1970. The average layover time for departing tankers in July was 16 days, compared with the monthly average of nine days during the first half of the year. Tankers normally offload into tank-lighters in the Haiphong area instead of berthing, and the lightering facilities appear to be limited.

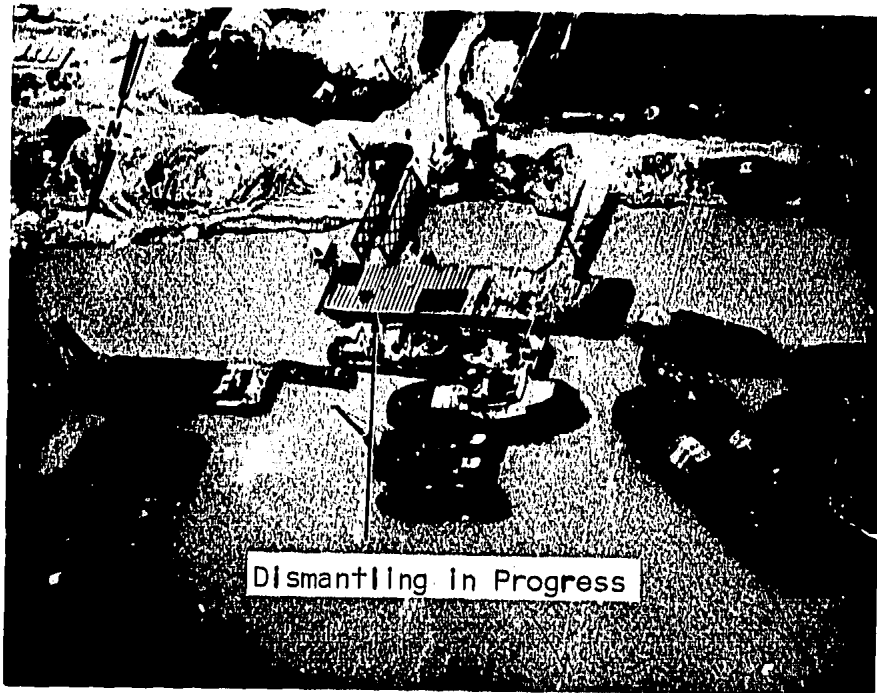
Construction at Haiphong

10. Photography in June showed that the petroleum storage area adjacent to the T-head pier at the marine hospital across the Cua Cum from Haiphong's main petroleum storage facility was being expanded. Ten new 21-ton tanks have been installed to complement the eight bunkered tanks already there. This pier and storage area may merely be a refueling point for small river and harbor craft rather than additional storage for petroleum imports.

11. Dismantling of the Hospital Wharf is about half complete and it almost certainly will be removed eventually. Nearby, fill material continues to be added to the western end of the new extension of the Chamber of Commerce Wharves. The transporter

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base for the fourth portal crane on the wharf extension is mounted on tracks, and boom assemblies lie on the adjacent apron (see the photograph).



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Table 1
Seaborne Imports, by Origin and Commodity
1970

Thousand Metric Tons

Origin	Foodstuffs		Fertilizer		Petroleum		General and Miscellaneous		Total	
	Jul	Monthly Average Jan-Jun	Jul	Monthly Average Jan-Jun	Jul	Monthly Average Jan-Jun	Jul ^{a/}	Monthly Average Jan-Jun	Jul	Monthly Average Jan-Jun
<i>Total</i>	<u>33.1</u>	<u>64.1</u>	<u>16.3</u>	<u>17.3</u>	<u>33.5</u>	<u>35.1</u>	<u>70.0</u>	<u>54.7</u>	<u>153.0</u>	<u>171.2</u>
Communist	<u>33.1</u>	<u>64.0</u>	<u>8.8</u>	<u>15.6</u>	<u>33.5</u>	<u>35.1</u>	<u>67.6</u>	<u>50.9</u>	<u>143.0</u>	<u>165.6</u>
USSR	16.7	43.1	6.8	12.4	33.5	34.6	16.3	24.5	73.4	114.6
Eastern Europe	0.5	0.1	2.0	1.6	--	--	24.9	7.3	27.3	9.0
China	4.3	17.5	--	--	--	0.5	26.5	18.0	30.8	36.0
North Korea	--	--	--	1.6	--	--	--	1.1	--	2.7
Cuba	11.6	3.3	--	--	--	--	--	0.1	11.6	3.4
Free World	<u>0</u>	<u>0.2</u>	<u>7.5</u>	<u>1.7</u>	<u>0</u>	<u>0</u>	<u>2.4</u>	<u>3.8</u>	<u>9.9</u>	<u>5.6</u>
Japan	--	--	7.5	1.7	--	--	--	0.3	7.5	2.0
Cambodia	--	Negl.	--	--	--	--	--	2.3	--	2.3
Other	--	0.1	--	--	--	--	2.4	1.2	2.4	1.4

a. Including 40,900 metric tons of unidentified cargo, 11,300 tons of metal products, 7,500 tons of machinery, and 2,000 tons of vehicles.

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Table 2
Seaborne Imports, by Flag and Commodity ^{a/}
1970

Thousand Metric Tons

Flag	July				Total	Jun	Monthly Average Jan-Jun
	Food- stuffs	Ferti- lizer	Petro- leum	General and Miscel- laneous			
<i>Total</i>	<u>33.1</u>	<u>16.3</u>	<u>33.5</u>	<u>70.0</u>	<u>153.0</u>	<u>171.7</u>	<u>171.2</u>
Communist	<u>28.9</u>	<u>8.8</u>	<u>33.5</u>	<u>48.6</u>	<u>119.8</u>	<u>148.8</u>	<u>145.4</u>
Soviet	16.7	6.8	33.5	16.4	73.4	126.9	117.7
East European	0.5	--	--	18.0	18.5	4.4	10.4
Chinese	--	2.0	--	14.1	16.2	17.5	13.4
Cuban	11.6	--	--	--	11.6	--	3.4
North Vietnamese	--	--	--	0.1	0.1	Negl.	0.5
Free World	<u>4.3</u>	<u>7.5</u>	--	<u>21.4</u>	<u>33.2</u>	<u>23.0</u>	<u>25.8</u>

a. Identified imports include some estimates of bulk cargoes, using methods which have proved to be highly reliable.

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Table 3
Seaborne Exports, by Destination and Commodity
1970

Thousand Metric Tons

Destination	Coal		Cement		Apatite		Rice		General and Miscellaneous		Total	
	Jul	Monthly Average Jan-Jun	Jul	Monthly Average Jan-Jun	Jul	Monthly Average Jan-Jun	Jul	Monthly Average Jan-Jun	Jul	Monthly Average Jan-Jun	Jul	Monthly Average Jan-Jun
<i>Total</i>	17.3	26.9	0.9	1.0	13.4	8.7	4.4	1.8	5.0	3.5	41.0	41.9
Communist	5.6	11.3	0	0	13.4	8.5	0	0	1.5	0.9	20.4	20.7
USSR	--	--	--	--	--	--	--	--	--	0.1	--	0.1
Eastern Europe	1.6	--	--	--	--	--	--	--	0.4	0.7	2.0	0.7
China	4.0	10.4	--	--	7.9	2.4	--	--	0.6	0.1	12.5	12.9
North Korea	--	--	--	--	5.5	6.1	--	--	0.4	0.1	5.9	6.2
Cuba	--	0.8	--	--	--	--	--	--	--	0.1	--	0.9
Free World	11.7	15.7	0.9	1.0	0	0.2	4.4	1.8	3.5	2.5	20.5	21.2
Japan	11.7	14.0	--	--	--	Negl.	--	--	0.1	0.4	11.8	14.4
Cambodia	--	--	--	--	--	--	--	--	--	0.3	--	0.3
Other	--	1.7	0.9	1.0	--	0.2	4.4	1.8	3.4	1.8	8.8	6.4

Table 4
Seaborne Exports, by Flag and Commodity a/
1970

Flag	July					General and Miscel- laneous	Total	Jun	Monthly Average Jan-Jun
	Coal	Cement	Apatite	Rice					
<i>Total</i>	17.3	0.9	13.4	4.4	5.0	41.0	25.6	41.9	
Communist	8.2	0.9	13.4	4.4	5.0	31.9	25.6	41.2	
Soviet	2.6	--	--	4.3	2.6	9.5	15.8	21.9	
East European	1.6	--	5.5	--	0.4	7.5	1.6	1.9	
Chinese	4.0	--	7.9	--	0.6	12.5	6.7	12.9	
Cuban	--	--	--	--	--	--	--	1.8	
North Vietnamese	--	0.9	--	0.1	1.4	2.4	1.4	2.7	
Free World	9.1	0	0	0	0	9.1	0	0.7	

a. Identified exports include some estimates of bulk cargoes, using methods which have proved to be highly reliable.

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Table 5
Ship Arrivals, by Type, Flag, and Origin
1970

Type/Flag	July						Jun Total	Monthly Average Jan-Jun
	Origins							
	USSR		Communist China	Other Communist	Free World	Total		
	Black Sea	Far East						
<i>Total</i>	5	8	10	6	10	39	40	43.7
Dry cargo	3	5	--	--	--	34	35	37.8
Tanker	2	3	--	--	--	5	5	5.8
Communist	<u>5</u>	<u>8</u>	<u>4</u>	<u>5</u>	<u>9</u>	<u>31</u>	<u>35</u>	<u>37.5</u>
Soviet	5	8	--	--	2	15	25	25.3
East European	--	--	--	3	--	3	1	2.3
Bulgarian	--	--	--	--	--	--	--	0.5
Polish	--	--	--	3	--	3	1	1.8
Chinese	--	--	4	1	--	5	5	5.5
Cuban	--	--	--	1	--	1	--	0.7
North Vietnamese	--	--	--	--	7	7	4	3.7
Free World	<u>0</u>	<u>0</u>	<u>6</u>	<u>1</u>	<u>1</u>	<u>8</u>	<u>5</u>	<u>6.2</u>
British	--	--	4	--	--	4	3	4.3
Somalian	--	--	2	--	1	3	2	1.7
Other	--	--	--	1 a/	--	1 a/	--	0.2 b/

a. Cypriot.

b. Maltese.

Table 6
Average Number of Dry Cargo Ships in Haiphong per Day

<u>Month</u>	<u>Number of Ships</u>			
	<u>1967</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>
January	7	21	24	14
February	10	23	21	17
March	16	23	21	15
April	16	19	21	15
May	18	16	20	18
June	25	23	18	18
July	22	30	21	14
August	17	28	17	
September	13	34	17	
October	13	33	15	
November	12	29	11	
December	13	27	13	
<i>Average for year</i>	<i>15</i>	<i>25</i>	<i>18</i>	

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Table 7
Average Layover Times
for Foreign Dry Cargo Ships Departing Haiphong a/

Month	Number of Days			
	1967	1968	1969	1970
January	12	15	25	13
February	10	27	21	14
March	13	28	17	17
April	12	19	19	14
May	17	14	20	13
June	22	17	21	17
July	24	25	21	17
August	33	31	22	
September	19	41	21	
October	19	35	19	
November	18	30	16	
December	15	29	14	
<i>Average for year</i>	18	25	20	

a. The average layover time for departing dry cargo ships is compiled by averaging layover times (including both the day of arrival and the day of departure) of all foreign dry cargo ships leaving Haiphong in the month. Tankers are excluded from the average because they do not compete with dry cargo ships for the limited berthing space in Haiphong.

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