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As a result of our attacks on enemy oil and the loss of Rumanian production in the last week of August, it is estimated that enemy production of oil in that month was 540,000 tons, or 40% of the normal monthly output.

2. In the case of synthetic plants it is doubtful whether any of the German Bergius hydrogenation plants are now in operation, although several may be capable of resumption shortly. Only three of the German Fischer Tropsch plants are believed to be operating normally and one is partially active. There is no evidence of decrease of activity in repairing these synthetic plants, and, failing further attacks, output for September might reach 258,000 tons, or 54% of normal. As regards mineral oil refineries, owing to the loss of Rumanian oil the refining of crude oil is at present confined to four refineries in Austria, one German refinery which may still be active after being heavily damaged, and four small and unimportant refineries in Hungary and Czechoslovakia. There is no evidence of any relaxation in the energetic repair work on refineries, and, failing further attacks, output for September might reach 165,000 tons, or 24% of normal. Output at present from other sources such as benzol, alcohol, taroil, etc. is about 192,000 tons.

3. It is impossible to make satisfactory estimates of consumption in August owing to enormous losses of vehicles, transfer of motor transport and stocks of fuel from one service to another, and lack of knowledge of enemy policy for allocation of supplies between various classes of consumers; but it is believed that in the latter half of August there was a sharp reduction in consumption imposed by lack of stocks and dwindling production and that it fell to the approximate level of production. It is considered that for practical purposes Germany's free reserves are now exhausted and that henceforth consumption must be limited to the equivalent of the amount of oil currently produced. Petrol

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