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International Energy Biweekly Review

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Overview

The OPEC ministerial meeting scheduled for next week in Caracas is not shaping up as the harmonious affair cartel members had been hoping for. Saudi Arabia and Iran are still firmly supporting a price freeze, much to the frustration of countries favoring an increase. Until recently, proponents of a price hike were confident the Saudis and Iranians would accede to a small increase to avoid a confrontation and split such as occurred last year. Now Venezuelan oil minister Hernandez feels OPEC is in such a confused state over prices that almost anything could occur at Caracas.

The Saudis and Iranians both have publicly reiterated their support for a freeze since the Shah's Washington visit last month. Indeed, Riyadh has suggested that the price issue be left off the meeting's agenda entirely. The Saudi strategy at Caracas apparently will be to press for no action at all to be taken on prices, hoping this will avoid an open division within OPEC and in effect leave prices at their current level. The United Arab Emirates and Qatar are supporting the Saudis, and, with strong Iranian backing, they could succeed.

While there is still considerable pressure in the cartel for a price increase, proponents have grown more pessimistic over their chances of negotiating one. Minister of Mining Sadli of Indonesia, who toured the Middle East in late November to rally support for a price hike, has now been authorized by President Suharto to accept a six-month freeze if Saudi Arabia and Iran insist on it. There is also some speculation that the most hawkish OPEC states—Iraq, Libya, and Algeria—may not send their oil ministers to Caracas unless Riyadh agrees beforehand not to block action on prices. These countries, who favor a 10-percent raise at a minimum, would send lesser delegations instead.

Venezuelan President Perez is among the most concerned with the outcome of the OPEC meeting. Perez had hoped that hosting this year's conference would enhance his image, both domestically and internationally, and improve his party's political standing for next year's national elections. Last month Perez sent his oil minister to the Middle East to lay the groundwork for a unified pricing decision at Caracas. While making little headway toward a price consensus, Hernandez did extract pledges from cartel members to seek an agreement in the interests of OPEC

Note: Comments and queries regarding this publication are welcome. They may be directed to [redacted] of the Office of Economic Research, telephone 351-5804.

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unity. At the same time, Perez publicly called for a 5- to 8-percent price increase, a position he characterized as moderate and one he believed would win acceptance within the cartel.

At the moment, Perez risks gaining very little politically from hosting the meeting and may even suffer a serious loss of prestige. A continued hard line on prices by Saudi Arabia and Iran presents the prospects of a freeze, a split decision, or at least heated debate on the issue. All would be embarrassing to Perez. Caracas has considered postponing or canceling the meeting, but this also would be damaging politically. The Venezuelans instead are continuing last-minute efforts to obtain an aggreement before the meeting's scheduled opening on 20 December.

Riyadh and Tehran may yet assent to a small price rise next week. If they do, it probably will reflect their underestimation of the resistance to a freeze among other OPEC states and a decision that an unyielding position is too divisive. Moreover, several Saudi leaders are sympathetic to the argument made by several OPEC members that some increase in prices is justified on economic grounds because of inflation and the declining value of the dollar. The Saudis' concern over Sadat's recent political initiatives in the Middle East has not altered their position on prices.

The Saudis expect to win approval of a freeze on oil prices for at least six months at Caracas. The length of a freeze may be a moot issue, however. Saudi oil minister Yamani sees market forces exerting upward pressure on prices by mid-1978. (Secret Noforn-Nocontract-Orcon)

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Business Week, 19 December 1977, p. 99, carried a badly garbled explanation of our estimate of the future Soviet and East European oil position.

> *OIL: Central Intelligence Agency analysts have pulled back from their projection that the Soviet Union and its East European allies will be net importers of 3.5 million to 4.5 million bbl. of oil per day by 1985. New studies suggest that pressure on the world oil market won't be nearly so severe, and that the East Bloc might continue to be self-sufficient in petroleum.*

If the USSR and Eastern Europe continue normal economic growth and associated energy consumption, their combined net imports would probably be on the order of 3.5 million to 4.5 million b/d in 1985. As a result of slower economic growth, tough energy conservation measures, and the high cost of oil imports, we believe that they will hold their combined net imports to some 2.5 million to 3.0 million b/d. We continue to believe that pressures on the world market will be severe, causing significant price increases and slowing world economic growth well before 1985. (Unclassified)

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JAPAN: RENEWED INTEREST IN CHINESE OIL

Japan has apparently decided to press ahead on a long-term trade agreement with Communist China under which China would more than double oil exports to Japan to 300,000 b/d by 1982 in exchange for industrial plants and construction equipment. Tokyo's renewed interest in the $10 billion, eight-year deal apparently stems from a desire to push exports to Communist countries in the face of growing problems in Western markets. The Japanese Government intends to induce domestic consumers to buy the heavy Chinese crude by offering financial incentives.

The Troubled Negotiations

Japanese consumers of Chinese oil—including refiners, steel companies, and power companies—have been the main obstacle to the negotiations, which have been under way for nearly four years. They do not want to handle large quantities of Chinese oil because:

- It currently must be blended with other crudes before processing.
- It solidifies at 35 degrees C, making it difficult to store, transport, and use.
- It carries less profit potential than other crudes.
- It could upset relations with Indonesian suppliers.

Japan: Trade With China

Billion US $

	Exports	Imports	Crude Imports
1972	0.61	0.49	0
1973	1.04	0.97	0.03
1974	1.98	1.30	0.41
1975	2.26	1.53	0.74
1976	1.66	1.37	0.41
1977 [1]	1.90	1.50	0.70

[1] Estimated.

At present, Japan consumes about 130,000 b/d of Chinese crude, with about 40 percent going to power companies and steel mills for direct burning. Japanese consumers have been claiming that they can absorb only about 220,000 b/d of Chinese crude without new refinery capacity to handle the oil directly. Japanese refiners currently blend small quantities of Chinese oil with other crudes so it can be handled by existing refineries. Power companies have been concerned over possible future government restrictions on burning the oil because of its nitrogen content.

Tokyo Begins To Press

Given its trade problems with the major industrial countries, Tokyo is now beginning to put the arm on Japanese consumers to accept up to the 300,000 b/d of

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Chinese oil by 1982, with possibly even higher levels of shipments in succeeding years. In part, the firmer government attitude reflects the ideas of the new Japanese Minister of International Trade and Industry, Komoto, who is a believer in export-led growth and a long-time advocate of expanded economic ties with Communist countries.

To help get domestic oil consumers on board, Tokyo is proposing to help finance a new 100,000-b/d cracking facility to process Chinese crude exclusively. The refinery, which reportedly can be completed in three years, would be built by Idemitsu Kosan—Japan's largest independent refiner—at a cost of $185 million. Tokyo may also make some concessions to allow for pollution caused by the direct burning of the oil.

The Deal

Although discussions have so far focused on roughly doubling oil shipments to Japan by 1982, China hopes to induce the Japanese to take even higher levels of oil shipments in the last three years of the agreement. In addition, it is looking to sell some steam and coking coal.

In return, the Chinese reportedly want a 6-million-ton capacity steel mill, a copper refinery, chemical fertilizer plants, and some construction equipment. Japan is also being asked to upgrade some existing Chinese steel mills. The Chinese request list is not firm, however.

The deal would require Japan to export goods in excess of the value of oil and coal received during the first four to five years of the agreement. The Chinese deficit would be made up by boosting oil and coal shipments in the final years of the eight-year agreement. Chinese officials have estimated the value of their requests at $10 billion—an amount that implies a doubling of Japan's current exports by 1980. (Secret Noforn-Nocontract)

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CANADA: SNAGS IN THE PIPELINE AGREEMENT

Problems are already developing over details of the US-Canadian Alcan pipeline agreement. At issue are specifications for the pipe that will largely determine whether Canadian firms get the inside track on more than $1 billion in contracts for Canada's portion of the line. Ottawa—concerned over high unemployment and slow economic growth—is pushing hard for 54-inch, low-pressure pipe that Canadian firms could manufacture using existing equipment.

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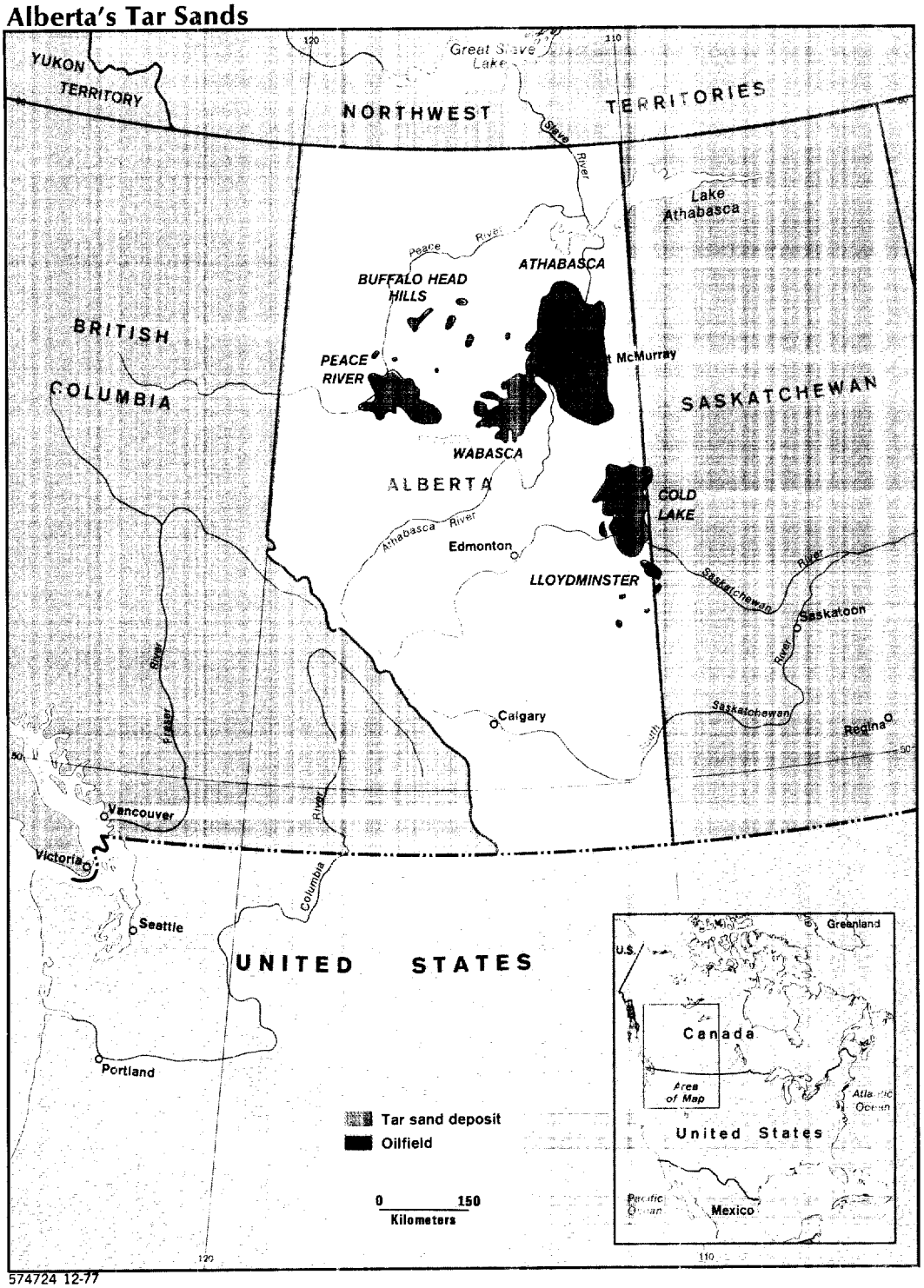
Alberta's Tar Sands



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A Billion Dollar Decision

Although the agreement signed on 20 September calls for the testing of three types of pipe, 54-inch low-pressure and 48-inch high- and low-pressure pipe, Ottawa is already pressing for adoption of the larger diameter pipe. Ottawa claims that using the larger pipe, which several Canadian firms are capable of producing, will cut the time required for testing and allow the pipeline to proceed on schedule. A decision to go with the 54-inch pipe would give two Canadian companies—STEELCO Canada, Ltd., and Interprovincial Steel and Pipe Corporation, Ltd.—an inside track on supplying most of the pipe.

Negotiations are now under way in Washington on pipeline specifications with US interests pushing for 48-inch, high-pressure pipe, a decision that would sharply reduce the Canadian companies' chances to fill the pipe order. Despite the claims of several Canadian companies, Ottawa does not believe they have the capacity to produce the smaller pipe in adequate amounts. Moreover, the Canadian Government will resist an option for high pressure pipe because such a decision would require greater expenditure on specialized pumping and valve equipment which Canadian firms have little capacity to produce.

Canadian Producers of Large-Diameter Pipe

	Type of Mill	Maximum Outer Diameter (Inches)	Maximum Wall Size (Inches)	Annual Capacity (Tons)
IPSCO				
Regina, Saskachewan	3-spiral weld sub arc	78.75	0.512	144,000
Edmonton, Alberta	1-spiral weld sub arc	80.0	0.625	48,000
STEELCO				
Welland, Ontario	spiral weld	60.0	1.125	600,000
International Portable				
Portable mill	1 medium frequency induction and submerged arc	48.0	NA	200,000
York Steel Construction, Ltd.				
Toronto, Ontario	1-spiral weld	60.0	0.50	40,000

At stake in the negotiations are contracts for 1.3 million tons of pipe, now estimated to cost $1 billion. The price probably will be somewhat higher by 1981 when construction is scheduled to begin. Total capital costs on the Canadian sections of the line are expected to be $4 billion to $4.5 billion.

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Sharp Competition for Contracts

A depressed world steel market has brought West German and Japanese steel and pipe companies into the bidding. West Germany and Japan currently produce pipe of all three diameters and required wall thickness, and capacity in both countries is sufficient to meet the pipeline's entire requirment on schedule. Moreover, the Alcan pipeline consortium may find it easier and cheaper to finance the project if large amounts of pipe are purchased offshore, thus attracting less expensive export financing from abroad.

Major Foreign Producers of Large-Diameter Pipe [1]

	Type of Mill	Maximum Outer Diameter (Inches)	Maximum Wall Size (Inches)	Annual Capacity (Tons)
Japan				
Kawaski Steel				
Chita	1-spiral weld	60.0	0.5	26,400
Chiba	1-spiral arc UOE	64.0	1.0	400,000
Nippon Kokan Kabushiki				
Fukuyama	1-sub arc UOE	56.0	1.0	440,000
	1-spiral weld	98.4	1.0	300,000
Anegoaski	1-spiral weld sub arc	64.0	1.0	66,150
Tsurumi	1-spiral weld	98.0	1.0	100,000
Nippon Steel				
Kimitsu Works	1-sub arc UO	56.0	1.0	450,000
	1-spiral weld sub arc	80.0	0.63	40,000
Yawata	2-spiral weld	64.0	0.394	44,100
	1-spiral weld	64.0	NA	22,100
Katakyushu	1-spiral weld sub arc	64.0	0.5	30,000
Sumitomo Metal Industries, Ltd.				
Sakai	2-spiral weld sub arc	72.0	1.0	50,000
Kakogawa	2-spiral weld sub arc	64.0	1.0	150,000
	1-spiral weld	79.0	NA	100,000
Kashima Works	1-sub arc	64.0	0.5	55,000
Kubota Tekko Iron and Machinery	1-spiral weld	63.0	NA	35,000
Muskogawa				
Kurimoto Iron Works				
Kagaya	1-uniomelt spiral weld	63.0	NA	50,000
West Germany				
Eisen und Metallwerke				
Ferndorf Gebrueder				
Bender				
Kreuztal-Ferndorf	3-sub arc	48.0	1.0	150,000

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Major Foreign Producers of Large-Diameter Pipe (continued)

	Type of Mill	Maximum Outer Diameter (Inches)	Maximum Wall Size (Inches)	Annual Capacity (Tons)
West Germany				
Eisenbau Kramer, mbH				
Kreuztal-Kredenbach	1-sub arc	48.0	1.0	75,000
Hoesch A.G.				
Dortmund-Barop	3-spiral weld	100.0	1.0	300,000
Mannesmann-Rohren-Werke A.G.				
Duisburg	1-spiral weld sub arc	80.0	0.75	55,000
Muelheim	1-sub arc	56.0	0.98	100,000
	2-spiral weld	80.0	1.0	125,000
Duesseldorf	1-spiral weld	98.0	0.98	75,000
Rohrenwerk G. Kuntse				
Herne	1-spiral weld	100.0	1.0	65,000
Huettental-Weidenau	2-spiral weld	72.0	NA	125,000
Salzgitter Huettenwerk				
Salzgitter-Brutte	2-spiral weld sub arc	63.0	1.0	90,000
Italy				
Italsider SpA				
Taranto	1-sub arc (no. 2)	56.0	1.0 }	900,000
	1-spiral weld sub arc(no. 1)	62.0	1.0 }	
	1-spiral weld (no. 2)	100.0	1.0	150,000
Terni SpA				
Terni	1-sub arc	87.0	1.0	150,000

[1] Pipe of 48 inch diameter or larger.

Growing Pressure for Canadian Content

The disagreement is shaping up as the first test of Canada's backing for the project. The Trudeau government made its decision to go with the Alcan proposal largely because it believed the project would give the Canadian economy a much needed boost. Ottawa estimates that pipeline construction will result in the creation of more than 100,000 man-years of employment, including 30,000 man-years in construction, 40,000 man-years in manufacturing, and 31,000 man-years in indirect activities induced by pipeline spending. In light of real GNP growth projected at only 2 to 2.5 percent in 1977 and a record 8.4-percent level of unemployment, the project is seen as a major boost. The peak of construction activity is two to three years away, but Ottawa believes that preordering by companies involved in the pipeline could begin to affect economic activity as early as next year. The government will press hard for any specifications that will give Canadian firms an edge.

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Ottawa is under heavy pressure to achieve the widely publicized target of 90-percent Canadian content in the line. Alberta Premier Lougheed and the consortium that will build the pipeline in Canada have repeatedly called for such provisions to maximize benefits to the Canadian economy. Without high levels of Canadian content, some will claim vindication for their contention that the pipeline is of little benefit to Canadians. With a national election expected next year, Ottawa can ill afford to allow potential economic benefits to slip away and will bargain hard for maximum Canadian participation. (Confidential Noforn)

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IRAQ-TURKEY PIPELINE: PUMPING RESUMES

Iraq has resumed pumping crude oil through the Iraq-Turkey pipeline after a week-long shutdown in mid-November. The mounting Turkish debt for imported crude was the ostensible reason given by the Iraqis for the closure. However, since tankers continued loading at the Mediterranean terminal of Dortyol, the temporary shutdown may have been caused by the need to work off stocks. In any case, Baghdad used the opportunity to press Ankara for payment.

The 500,000-b/d pipeline has been operating at less than two-thirds of capacity since it opened in late May. Turkey, which has the option of purchasing up to 40 percent of the line's capacity, is the major buyer.

Background

The recent closure is the latest in a series of problems that have restricted the flow of crude through the line. The pipeline, which took two years to build at a cost of $900 million, was completed in January 1977 but remained idle for five months while Ankara negotiated a special deal with Baghdad under which Turkey would be entitled to buy crude at slightly reduced prices. Baghdad agreed to only a small price cut. Its position was based not only on reluctance to suffer revenue losses but also on concern about being open to charges of price shaving from other OPEC members. Moreover, Baghdad did not want to appear overly lenient on an issue also involved in its long-standing dispute with Syria over the Tripoli-Banias pipeline, closed since April 1976. In addition to its refusal to pay anything near the official price for Iraqi crude, Damascus had demanded a substantial increase in transit fees for crude.

Operational problems have also curtailed throughput at various times. A rupture of the line in late July completely halted the flow temporarily.

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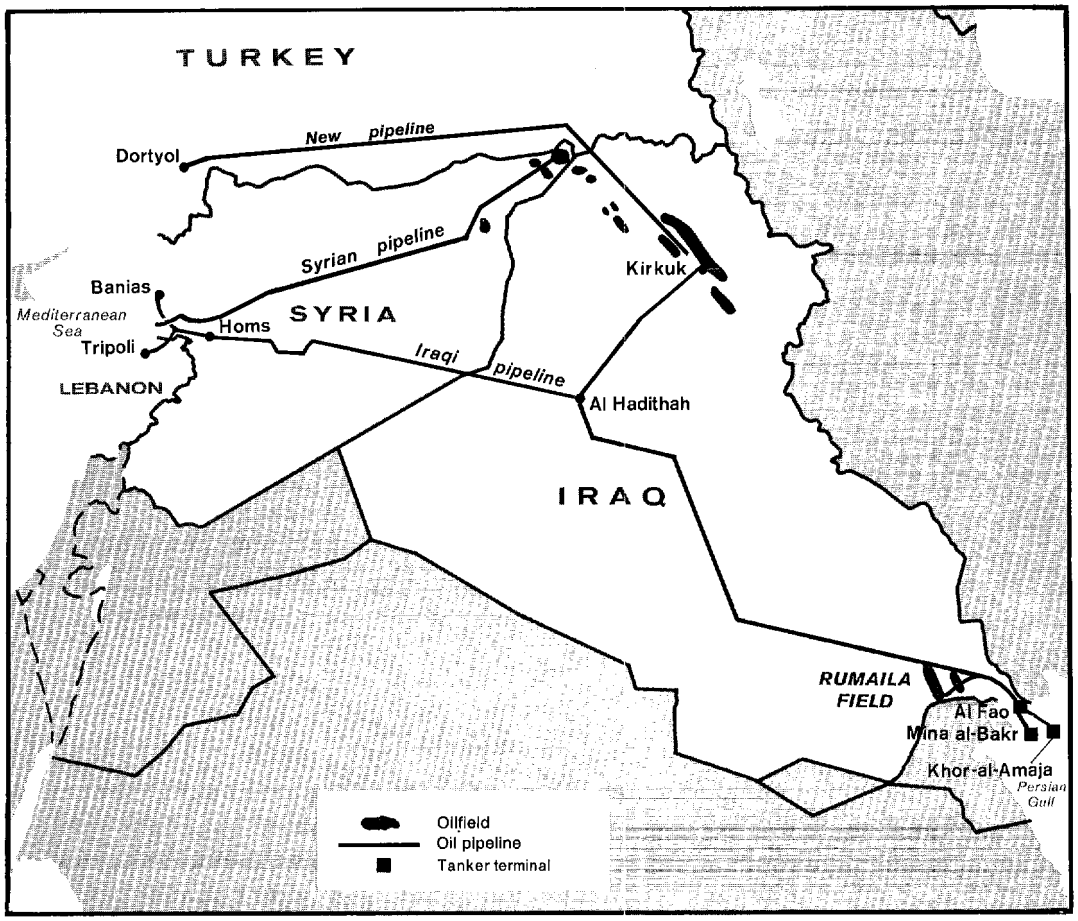

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Turkey's Problems

When the Iraqis shut the line down in mid-November, the Turkish debt for imported crude had risen to $210 million. Within a week, a settlement described by Ankara as "an extraordinarily friendly gesture" and "extraordinarily generous" was reached. The brief closure was sufficient to pressure the Turks, prompting them to transfer more than $26 million to the Iraq National Oil Company (INOC) in early December as partial payment for previous liftings.

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While the amount owed Iraq represents only a small portion of the massive Turkish short-term debt, Ankara recognizes the importance of maintaining good relations with Baghdad, which accounts for almost 60 percent of Turkey's crude imports. (Secret)

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USSR: ELECTRIC POWER SHORTAGES

The USSR is facing some of the same energy problems confronting major Free World industrial economies. Moscow's most pressing current difficulty is balancing demand against slowly growing fuels and electric power production. Recognizing that energy resources must be conserved, it has initiated a stringent fuel allocation program. This article is the first of two on Soviet energy problems. The second will examine Soviet energy conservation efforts.

The Soviet Union reportedly is experiencing increasing shortages of electric power in the industrialized European areas, where 80 percent of the power in the country is consumed. Insufficient power generating capacity to meet the growing demand for electricity is creating serious problems in operating the unified electric power networks.

Recent Developments

Installation of new generating capcity in the USSR has barely been keeping up with the increase in demand. In the period 1971-75, the Soviets fell 10,000 megawatts, or 15 percent, short of meeting their plan for installation of new capacity and are now operating almost without any reserve. Allocations of power to industrial consumers in various European areas have been drastically reduced. The Council of Ministers adopted a resolution at the end of July calling for economy in the use of fuel and electric power in the fall-winter period of 1977-78. Moscow consumers in particular were urged to conserve on the use of electric power. While such appeals are not new, they appear to be more urgent than in the past.

The most serious problem, according to L. A. Trubitsyn, an official of the Ministry of Power and Electrification, is the continuing drop in voltages and frequencies throughout the transmission network. Such drops in voltage and frequency indicate that the demand for power is greater than the generating capacity hooked into the grid, and a quick reduction in the consumer load is necessary. Four large regional powerplants recently visited by a US exchange delegation were operating at 1

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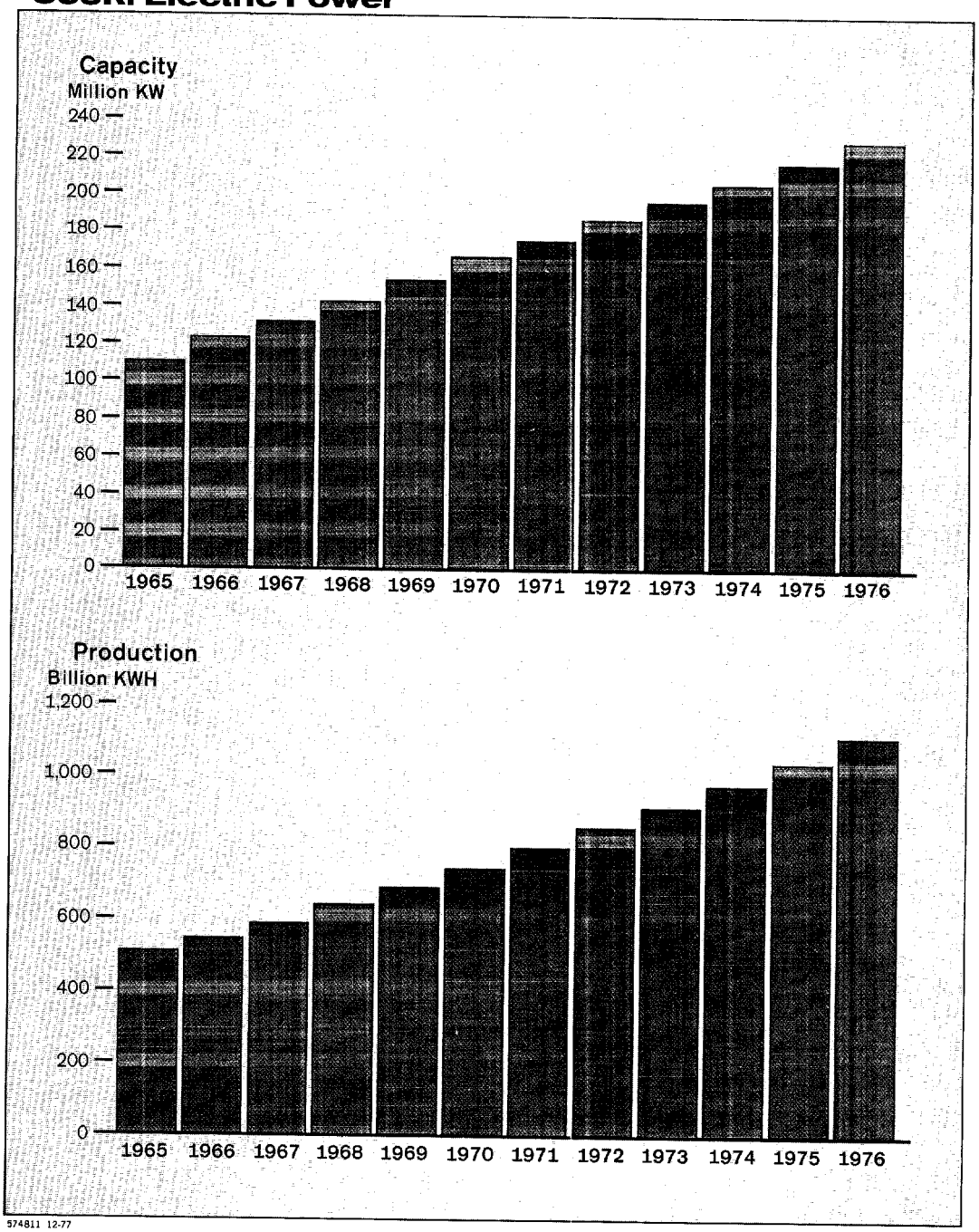
USSR: Electric Power



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to 2 percent below the standard frequency required for stable operation of the network, and Trubitsyn admitted that the situation is getting much worse. Contingency plans are automatically implemented when the frequency drops further, with certain predetermined consumers being dropped off the line.

The Soviets have been operating on increasingly low frequencies for several years. In 1975, clocks in the US Embassy in Moscow were losing 2 minutes a day. By 1977 they were losing 6 minutes a day. The effect could be far more serious on the operation of automated industrial equipment.

Underlying Factors

The problem boils down to a shortage of generating capacity in the European part of the Soviet Union. Last year, the Ministry's construction organizations failed to commission a number of new generating facilities. The plan for this year is to put into operation about 7,000 MW of new capacity in European areas. With less than a month remaining, only about 2,700 MW have been put into operation, 1,000 MW of it at the Chernobyl nuclear powerplant in the Ukraine, which is not yet operating at rated capacity. The Ministry of Power and Electrification has always been one of the major recipients of capital investment, but in the past 10 years its share of industrial investment has dropped from 12 percent to 10 percent.

It is becoming increasingly difficult to provide adequate fuel resources for thermal powerplants in the European part of the country; 80 percent of Soviet energy resources are in eastern regions. In the future, only nuclear powerplants are expected to be built in these areas, but the nuclear program is lagging badly. Furthermore, the power output from the large hydroelectric powerplants on the Volga and Dnieper Rivers is being cut back to provide more water for irrigation. Power output from the Dnieper River was to be reduced by 20 percent, beginning in 1975, to satisfy irrigation needs. Similar reductions were scheduled for the large Volga River powerplants, which supply power to Moscow and to the Urals region.

The Power Balance

At the end of the third quarter in 1977, Soviet production of electric power had increased only 3.6 percent over the same period last year, the lowest rate of increase ever reported. In the Ukrainian Republic, which produces almost 20 percent of the electric power in the USSR, the rate of increase was only 2.6 percent. The planned increase in national power production for the year is only 4.4 percent, compared with the 7 percent achieved last year. At the same time, total industrial output is planned to grow at the rate of 6.0 percent in 1977. Even last year, demand was reportedly growing at a faster rate than production.

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About 72 percent of the total electric power consumed in the Soviet Union is allocated for industry and construction and only 15 percent for household use; the rest is used for electrified transport and rural consumption. In the US, residential use makes up 34 percent of power consumption. Industry, as the major Soviet consumer of electricity, is the prime target for cutbacks in power consumption, and the first to feel the pinch when it becomes necessary.

More Trouble Ahead

Electric power officials have expressed grave concern about the great increase in demand for electricity which will be created by the introduction of air-conditioning and by other preparations for the 1980 Olympics, indicating that it would play havoc with the power supply. The new International Trade Center and several of the large Moscow hotels are to be air-conditioned in 1978. Officials are also concerned with the rapidly growing demand for power to operate television sets and other home appliances. Eight of 10 families now have TV sets, an increase from five of 10 in 1970.

The Soviets have stated that a power blackout such as the one in New York is impossible in Moscow, or any other Soviet city, because the transmission lines of the Soviet United European Power System are interconnected. In case of need, additional sources of electricity can be channeled to Moscow or any other point. Because of the conservative design of Soviet generating equipment, it has been able to withstand low voltage and low frequency operating conditions which would damage highly efficient US generating equipment. If the situation continues to worsen, however, it is not inconceivable that Moscow could experience power brownouts or even blackouts. (Confidential)

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SOVIET YAKUTSK COAL BASIN DEVELOPMENT

The Soviets have completed a rail line to the Southern Yakutsk Coal Basin, which contains an estimated 40 billion tons of coking coal. The 400-kilometer line will allow the USSR to tap this massive coalfield, part of the joint Soviet-Japanese project to develop Siberia's mineral resources.

Background

The Yakutsk coal project will provide Japan with more than 80 million tons of high-grade coking coal over a 16-year period, beginning in 1983 when 3.2 million tons

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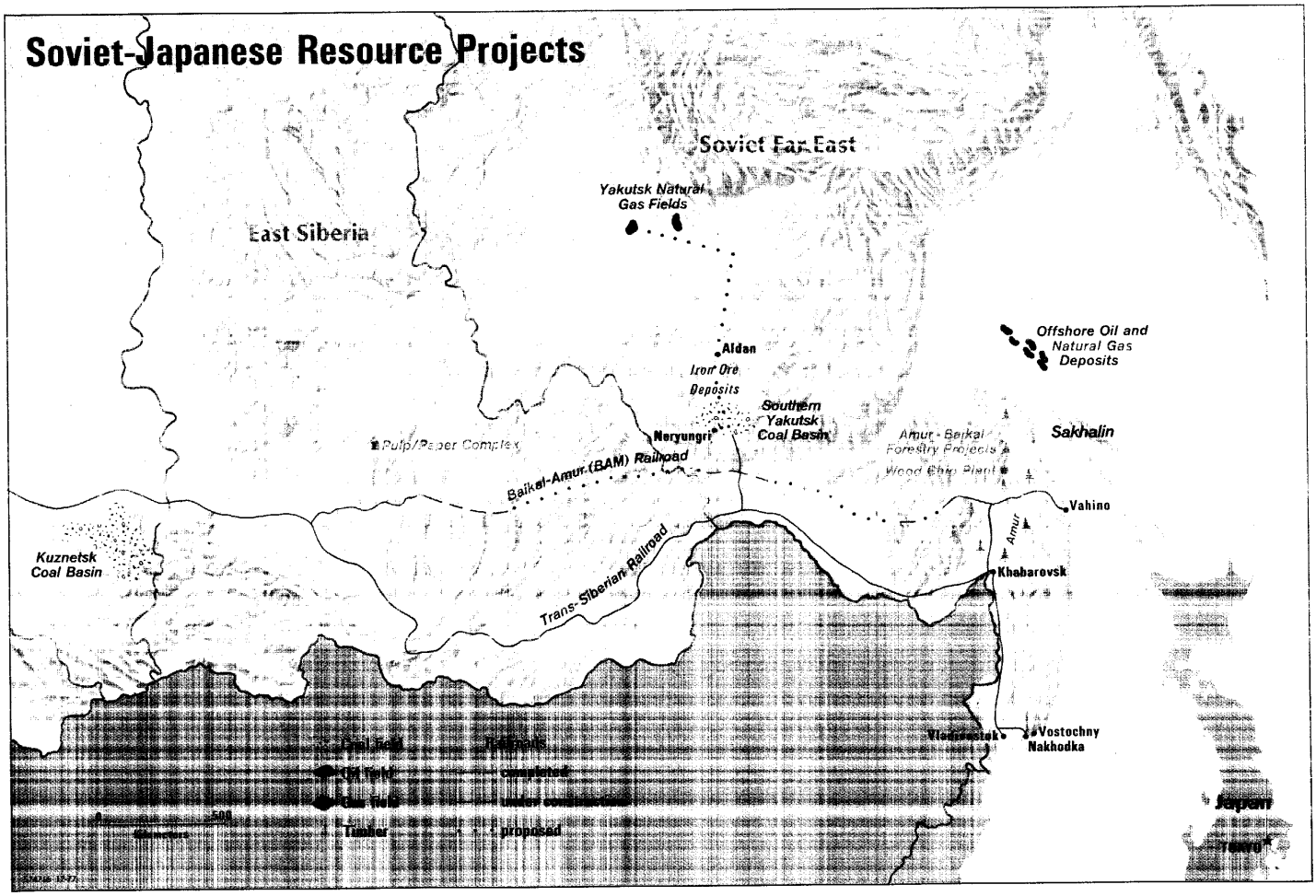

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will be shipped. Deliveries will reach 5.5 million tons annually in 1985 and continue at that level through 1998. These shipments will meet an estimated 5 percent of Japan's needs for coking coal by 1985.

Japan's Export-Import Bank has extended $540 million in credits to finance development of the Yakutsk deposits. The Soviets have used these credits to purchase construction equipment and coal mining equipment, including US-designed shovels and Canadian off-highway trucks built under US license. Sales of Yakutsk coal and an additional one million tons annually of Kuznetsk coal to the Japanese will allow Moscow to rapidly repay the credits.

Current Status

25X1 Overburden removal has been under way for more than a year [redacted] and mining will begin in late 1978 or early 1979. The Soviets will ship the mine's surface coal, which must be extracted before mining of the higher grade coking coal can begin, over the Trans-Siberian railroad to domestic power plants. Soviet efforts to include surface coal in the joint project with Tokyo failed; Japan has a sufficient supply of steam coal from domestic sources and existing import contracts to satisfy its needs for the next several years. Yakutsk coking coal will move over the Trans-Siberian and Baikal-Amur (BAM) railroads to Vostochny, where a large coal-loading terminal is being built with Japanese aid. 25X1

Long-Term Benefits

The Yakutsk project will provide major benefits to the Soviets. Exports of Yakutsk coal to Japan will net an estimated $4 billion in hard currency earnings over the life of the project. During peak shipments to the Japanese between 1985 and 1998, the mine will produce an additional 5 million to 7 million tons annually of steam coal for Soviet use. In addition, the branch line just completed with Japanese aid will continue several hundred kilometers north through the Southern Yakutsk region, giving access to vast iron ore deposits.

Other Soviet-Japanese projects to develop Siberia's energy resources and transport facilities are showing continued progress. A joint drilling venture recently resulted in a promising oil strike off the northeast coast of Sakhalin Island. The Japanese-Soviet Economic Committee is discussing the further expansion and modernization of selected Soviet Far Eastern ports. However, it has advised that further feasibility studies be made on the Yakutsk gas and Amur Baikal forestry projects and on the construction or remodeling of various pulp mills in the USSR.

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Further cooperation with the Soviets on Siberian projects is likely despite Tokyo's strained relations with Moscow on political issues. Japan, almost totally dependent on foreign sources of raw materials for its industries, has long sought supplies in nearby Siberia. Tokyo's interest in these resources coupled with Moscow's need for hard currency to buy Western technology may encourage cooperation on other resource ventures. (Confidential)

* * * * *

FREE WORLD REFINING: CAPACITY GROWTH SLOWS

Free world petroleum refining capacity increased by 2.2 million b/d (3.7 percent) in 1976, the second successive year of slow growth. This year growth will be slow again. Recent capacity increases represent completion of projects started before the 1974-75 economic downturn, inasmuch as it requires three to five years to design and build a new refinery. Despite the slowdown in capacity growth, the additions have exacerbated the problem of surplus refining capacity that has plagued the industry since 1975.

Over the past year, refiners have become more pessimistic about absorbing the capacity overhang. Planned future additions to Free World refining capacity have dropped sharply from 26.5 million b/d (equal to 45 percent of 1 January 1976 capacity), to 10 million b/d (16 percent of 1 January 1977 capacity).

The refining industry, particularly in Western Europe where one-third of Free World capacity is located, is depressed. Although consumption of petroleum products

Planned New Refining Capacity, by Area

	1976		1977	
	Thousand b/d	Percent of Existing Capacity as of 1 January	Thousand b/d	Percent of Existing Capacity as of 1 January
Total	26,491	44.5	10,050	16.3
Western Europe	7,767	37.8	2,084	10.0
North America	4,854	26.9	2,234	11.8
Far East and Oceania	4,464	45.2	1,526	15.2
Central America, South America, and Caribbean	2,377	34.9	784	11.2
Middle East	2,377	146.7	2,279	68.0
Africa	2,674	201.4	1,143	77.2

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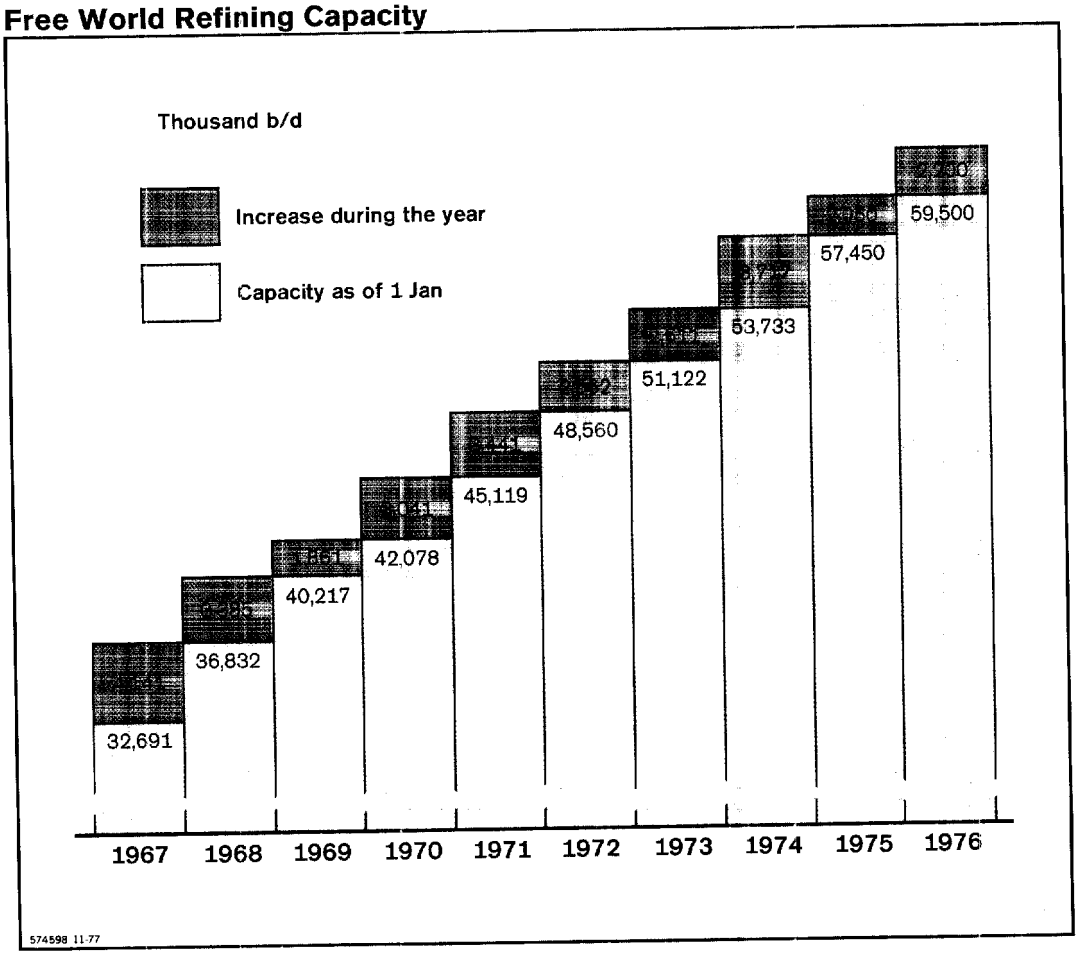
Free World Refining Capacity



has increased over the past year, refineries on average are currently operating at only about three-fourths of capacity. Because refineries are capital intensive operations, where operating costs largely reflect fixed charges for depreciation and interest, underutilization increases the cost per barrel of crude processed. In this environment, many refineries are operating at a loss. As a result, many projects proposed but not started are being canceled.

Middle East and Africa

About 3.4 million b/d of the planned refining capacity is in the Middle East and Africa. It represents 34 percent of the planned total, whereas existing capacity in the

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two areas is only 8 percent of the Free World total. While growth of refining capacity in these areas will be substantial during the next five years, it will nevertheless be less than half of the expansion planned a year ago.

The goals of these large export projects conflict directly with petroleum policies of major consuming countries, which is to maintain a refining industry adequate to cover all or most of the country's product needs. Within a few years, refining capacity in other Free World regions will probably be sufficient to meet local needs, and interregional trade in products will be used largely for balancing purposes.

Western Europe

Western Europe, which has been particularly hard hit by overcapacity since late 1973, shows only 2.1 million b/d of planned expansion. Despite some pickup in product demand since the 1974-75 recession, refining capacity has grown more rapidly as projects started in the early 1970s have reached completion. Consequently, refinery utilization averaged only about 65 percent in 1976, a slight improvement over 1975. In the European Community, utilization has been even lower than Western Europe as a whole, and a recent study by the European Commission indicates it may not return to favorable rates until well into the 1980s. The study projects utilization at about 80 percent by 1980, with a gradual return to the 85- to 90-percent range by about 1985. It suggested that EC countries scrap or mothball old capacity equal to about one-sixth of the area's total or freeze refinery construction. The United Kingdom objects to the second proposal on the grounds that plans to refine two-thirds of its North Sea crude domestically will require capacity expansion.

United States

Refinery utilization in the United States is running at 91 percent of capacity, or above the 85- to 90-percent range which the industry considers the most efficient operating range. The high US rate reflects:

- Continued growth in demand since 1974-75 for light products, mainly gasoline and middle distillates which constitute about 90 percent of US refining output.

- Lagging domestic refinery construction in recent years because of spiraling construction costs and uncertainty over government oil pricing policy.

- The threat of divestiture of refining/marketing operations from production.

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Despite these difficulties the industry plans a capacity expansion of 1.4 million b/d over the next few years. This increase will fall short of providing self-sufficiency. A recent study by a major oil company estimates the required additional capacity at 1.6 million b/d by 1980. According to another industry estimate, demand growth will average 2 to 3 percent annually into the early 1980s. At these rates, the increase in demand would range between 1.8 million and 2.8 million b/d by 1982, for example, and require an equivalent expansion of refining capacity.

Far East and Oceania

Refinery utilization in Japan, which accounts for 55 percent of the total refining capacity in the Far East and Oceania, dropped from 91 percent in 1973 to an average of 81 percent in 1974-76 largely because of the slowdown in economic growth. Nonetheless, the Ministry of International Trade and Industry (MITI) recently approved plans for new refinery expansion. Capacity scheduled for completion by 1981 totals 560,000 b/d or about 10 percent of existing plant. MITI is also considering but has not yet acted on applications for an additional 390,000 b/d of new capacity.

Elsewhere in the area, Singapore, the big exporting center with more than 900,000 b/d of capacity, has been operating far below capacity since 1973. It shows no projects for additional capacity. (Unclassified)

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LONG-TERM NON-OPEC CRUDE PRODUCTION TRENDS

The non-OPEC countries' share of world crude oil production accounted for almost 60 percent of world output in 1960. By 1976 their relative share had slipped to less than 50 percent despite a growth of production from 12.3 million b/d to 26.7 million b/d.

Free World non-OPEC production showed a sharp relative decline, from almost three-fourths of non-OPEC output to almost 55 percent from 1960 to 1976. Concurrently, the production share of Communist countries increased from about one-fourth to about 45 percent of the non-OPEC total.

Free World

The decline in the Free World share of non-OPEC output largely reflects the peaking of US crude production. In 1960 US production of more than 7.0 million b/d accounted for 57 percent of non-OPEC output. US output grew at an average of only

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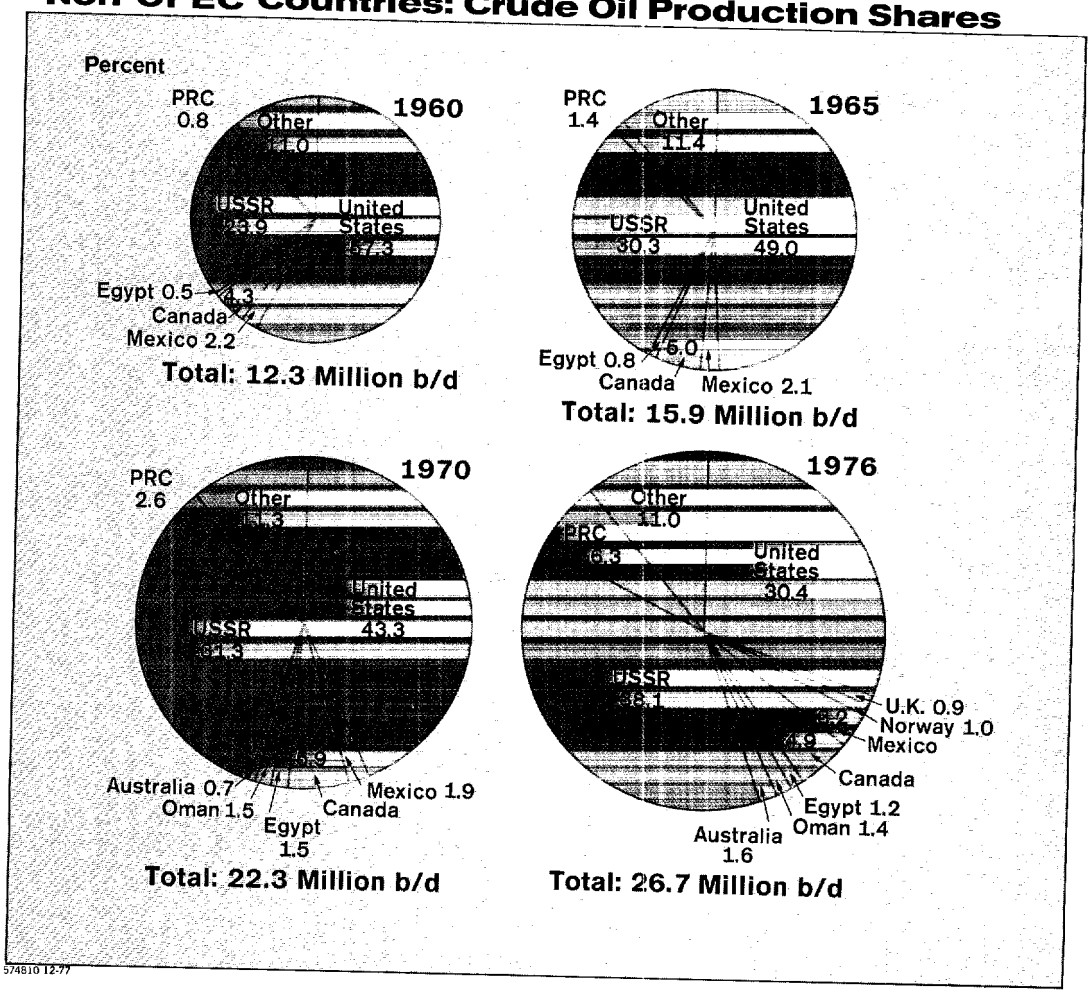
3.2 percent annually during the 1960s, however, peaking at 9.6 million b/d in 1970. Since then production has steadily declined, dropping to 8.1 million b/d in 1976 and accounting for about 30 percent of non-OPEC output. The onset of Alaskan crude production this year will stabilize the US share at near last year's level.

Outside the US, non-OPEC production grew an average of 6.6 percent annually in 1971-76. The main contributors to the expansion have been the United Kingdom and Norway, as North Sea production started, and Mexico. UK output reached 245,000 b/d in 1976, representing almost 1 percent of the non-OPEC total. In first half 1977, output rose again averaging 715,000 b/d, or 2.6 percent of the total. Growth

Non-OPEC Countries: Crude Oil Production Shares



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in the Norwegian sector has not been as rapid because of Oslo's self-imposed development restrictions. Norwegian production reached 265,000 b/d in first half 1977. Total North Sea output during first half 1977 accounted for 3.5 percent of non-OPEC production compared to less than 1 percent in 1975.

By 1976 Mexico's share of non-OPEC output climbed to 3.2 percent as crude production reached 850,000 b/d, more than double the 1970 production level. The surge reflects new production from rich onshore fields in the southern part of the country. Production averaged 930,000 b/d in first half 1977, providing a slight boost to Mexico's share.

Elsewhere production shows divergent trends. After peaking at 1.8 million b/d in 1973, Canada's output declined as Ottawa cut exports to the United States to conserve dwindling domestic reserves. As a result, output fell to 1.3 million b/d in 1976—only 4.9 percent of non-OPEC production.

Egypt, a member of OAPEC but not OPEC, accounted for 1.4 percent of production in first half 1977 as its output reached 400,000 b/d compared to 60,000 b/d in the early 1960s. Oman, which had no production before 1967, was producing 335,000 b/d by 1970 and 365,000 b/d in 1976. Australia, which produced no crude oil until the mid-1960s, had an output of 425,000 b/d in 1976.

Communist Countries

From 1960 to 1976 crude production from Communist countries grew at an average annual rate of 8.5 percent compared to an annual growth of 3 percent for the non-OPEC Free World. The USSR's share of non-OPEC output reached 36 percent (9.0 million b/d) in 1974 when it displaced the United States as the largest crude oil producer in the world. Last year, the USSR's production of 10.2 million b/d represented 38 percent of the total.

The People's Republic of China has experienced a significant growth in output since 1960. In 1976 production reached 1.7 million b/d compared to 100,000 b/d in the early 1960s.

The slow growth of production in other Communist countries has caused a small drop in their production share from 2.3 percent in 1960 to 1.5 percent in 1976. (Unclassified)

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DEVELOPING COUNTRIES: OIL POTENTIAL, POLICIES, AND CONSTRAINTS *

The likelihood of petroleum supply shortages beginning in the early to mid-1980s has heightened interest in the oil potential of less developed countries (LDCs). Basically this potential depends on geological factors which determine the reserve base of an individual country. Identifying and developing the reserve base, however, depend on a variety of factors including government policies toward foreign oil companies, technical limitations of state-owned oil companies, financial constraints, and in some instances, territorial disputes which impair access to promising areas. This report evaluates the oil potential of 40 developing countries—including those OPEC members outside the Middle East and North Africa—with these factors in mind.

The Resource Base

For most LDCs, the oil reserve base itself is too small to support oil production—large reserves are known to exist in only a handful of countries. In the Western Hemisphere, Mexico with 25 billion barrels of proved and probable reserves is by far the leader, followed by Venezuela with 14 billion barrels. Sub-Saharan Africa is dominated by Nigeria with 19 billion barrels. Among other countries in the area, only Angola and Gabon have reserves of as much as 1 billion barrels. The leaders of the non-OPEC Middle East are Oman with 6 billion barrels and Egypt with 4 billion barrels; no other country in the area comes even close. In South and East Asia, Indonesia has 14 billion barrels, while Brunei, Malaysia, and India have about 2 billion barrels each.

With adequate exploration, prospects are reasonably good for expanding the reserve base of countries that already have fairly extensive reserves. Locating fields of Middle East size, however, appears possible only in Mexico and perhaps on the Argentine continental shelf. Other areas with good—albeit substantially smaller—potential include eastern Peru, Ecuador, Egypt, India, and those producing countries bordering the South China Sea. In some countries—notably Venezuela, Nigeria, and Indonesia—substantial exploratory work is needed just to keep the present reserve base from declining.

Geological prospects elsewhere in the developing countries are uncertain at best. Considerably more exploration is required even to identify areas with geological

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Selected LDCs: Oil Potential

Country	Prospects for Increasing Reserves	Operating Climate	Remarks
Latin America			
Argentina	Good to excellent	Good to fair	Territorial dispute with UK
Belize	Fair to poor	Fair to good	Territorial dispute with Guatemala
Bolivia	Good to fair	Good	Continued small additions to reserves likely
Brazil	Good to fair	Fair to good	Operating climate improving
Chile	Fair	Good to fair	Additional small finds possible
Colombia	Fair	Fair to good	Best prospects are for gas on north coast
Ecuador	Fair to good	Fair to good	More exploration needed in eastern area
Guatemala	Fair to good	Fair	Not a real winner, but some increase in reserves likely
Mexico	Excellent	Good	Good prospects for Middle East-sized discoveries
Paraguay	Fair	Good	Favorable geology, but poor exploration results
Peru	Good to fair	Fair to good	More exploration needed in trans-Andean area and offshore
Uruguay	Poor	Good to fair	Exploration failures dim prospects
Venezuela	Fair to good	Fair to good	Much explored, but good prospects remain
Other	Poor	Good to fair	Few possibilities outside Trinidad and Central America
Asia and Pacific			
Bangladesh	Poor	Good to fair	Gas prospects promising; territorial disputes
Brunei	Good to fair	Excellent	Good prospects for additional offshore discoveries
Burma	Fair to good	Fair	Small additions to onshore reserves likely; some offshore potential
India	Good	Good to fair	Another "Bombay High" is not out of the question
Indonesia	Good	Good	Discovery rates continue strong
Malaysia	Good to fair	Fair	More exploration needed in several areas
Pakistan	Fair	Good to fair	Major basin unexplored
Philippines	Fair to good	Good	Offshore potential; territorial disputes
South Korea	Fair	Fair to good	Territorial disputes
Taiwan	Poor to fair	Good to fair	Gas prospects good; territorial disputes
Thailand	Poor	Good	Good gas prospects
Vietnam	Fair to good	Fair to poor	Noncommercial finds indicate some potential
Other	Poor	Good to poor	

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Country	Prospects for Increasing Reserves	Operating Climate	Remarks
Non-OPEC Middle East, North Africa, and the Mediterranean			
Egypt	Good to excellent	Good	Dispute with Israel slows exploration
Greece	Fair to poor	Fair	Territorial dispute with Turkey
Jordan	Poor	Good to excellent	West Bank may hold some potential
Oman	Good to fair	Good	Discovery of more small, high-cost fields likely
Syria	Fair	Fair	Best prospects offshore
Tunisia	Good to fair	Good to fair	Territorial dispute with Libya
Turkey	Fair	Fair	Offshore areas hold some promise
Other	Poor	Good to fair	Israel and Lebanon hold little potential
Sub-Saharan Africa			
Angola	Good to fair	Poor to fair	No increase in exploration likely until political situation clarifies
Cameroon	Good	Good to fair	Small additions to reserves almost certain
Chad	Good	Good to fair	Expensive pipeline needed to get oil out
Congo	Fair to poor	Good to fair	Any additions to reserves will probably be small
Gabon	Fair to poor	Good to fair	Any additions to reserves will probably be small
Ivory Coast	Fair to good	Good to fair	Noncommercial finds may presage larger discoveries
Nigeria	Good	Fair to good	Many more small fields likely to be discovered
Zaire	Fair to poor	Good to fair	Any additions to reserves will probably be small
Other	Poor	Good to poor	The East African coast from Sudan to Somalia and the Gulf of Guinea area west of Nigeria have some potential

conditions favorable to finding oil. Basically unsurveyed areas with some potential include Pakistan's Baluchistan Basin, the Bay of Bengal, and the Adaman Islands. The East African coast, particularly along Somalia, has also been left largely untouched. More work is also needed to prove potential in the offshore and Amazon areas of Brazil, in offshore areas of western Africa, between Ivory Coast and Angola, and in the waters of the South China Sea.

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Foreign Participation

Developing even the known potential has been hampered in some instances by government policies toward the international oil companies. Unduely harsh terms, unilateral changes in contracts, and nationalizations have often characterized past company-country relations in the Third World.

State oil companies exist in almost all developing nations. These companies are not in themselves a hindrance to oil exploration and development. Indeed, some state companies—that of Egypt is a good example—have excellent relations with the foreign firms. Other state companies are little more than government departments faithfully reflecting the attitudes of the regimes they serve. Still others, however, are bastions of nationalism and would rather see the oil left in the ground than produced with foreign help.

Few, if any, state oil companies have the technical and managerial skills to explore in the offshore areas and deep formations where most new oil is found. Only the best of the state companies, Mexico's Pemex, is capable of finding and producing oil, even in difficult areas; the speed and efficiency of devlopment is limited, however, to the extent that Pemex sticks to its "go-it-alone" credo. Other generally competent state companies, including those of Argentina, Brazil, India, and Egypt, lack the ability to find and produce oil in difficult locations without foreign help. Despite these limitations, many state companies have reserved the best areas for themselves while establishing relatively harsh terms for foreign participation in higher risk operations.

Liberal operating guidelines do not assure company interest unless geological prospects indicate sizable reserves. Major oil companies, for example, have devoted few resources to exploration in many sub-Saharan countries with limited oil potential. In several countries with domestic oil consumption of less than 10,000 b/d each—notably the Ivory Coast, Chad, Zaire, and Congo—finding and developing even a small reserve base could go a long way toward meeting these needs. One constraint in going this route would be the necessity for regional refineries to process small amounts of crude. In any event, oil companies have tended to lose interest in exploration because key potential reserves are too small to support more sizable production levels.

Financing and Equipment

Countries with sizable proven oil potential have little trouble obtaining needed funds. Mexico faced some constraints earlier this year as a result of foreign borrowing limits imposed by the International Monetary Fund (IMF), but these controls may be relaxed on oil-related borrowing. A few small-scale producers—Pakistan, for example—have also run into problems obtaining funds for exploration equipment purchases in

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the West. India may eventually face a similar difficulty. In these instances, however, the basic problem is the host government's reluctance to induce foreign oil companies to enter the area. West African countries such as Ivory Coast, Cameroon, Chad, and Congo would face financial as well as technical problems if they attempted to sustain an exploration effort in the event of a foreign company pullout.

At present, the availability of rigs and other equipment is not a major constraint. Temporary bottlenecks might arise if extensive exploration programs were simultaneously undertaken in several areas of the world; such bottlenecks could probably be eliminated in a one- to two-year period. A much greater constraint is the shortage of experienced personnel at all levels. Despite the high international mobility of oil workers and technicians—a factor that helps make most efficient use of such labor—this constraint is likely to persist for at least the next decade.

Territorial Issues

Territorial disputes are impeding exploration of numerous promising areas. Conflicting territorial claims, for example, have all but hamstrung offshore operations in the South China Sea and off South Korea. Boundary disputes are also interfering with work in high-potential offshore areas claimed by Tunisia and Libya. Conflicting Greek-Turkish claims have prevented oil company operations in their offshore areas as well; Argentine-British claims to the Falkland Islands will become a problem if large oil desposits are located in that area. In the Gulf of Suez, Israeli harassment of oil company operations has already slowed development of sizable known reserves.

The Production Outlook

Given the present pace of exploration and development we expect oil production in non-OPEC LDCs as a group to reach 6 million b/d by 1980 and range from 8 million to 9 million b/d in 1985. These projections are based on development efforts already in prospect and mainly reflect expected production gains in Mexico, Egypt, and India. (Secret Noforn)

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National
Foreign
Assessment
Center

International Energy Biweekly Statistical Review

14 December 1977

ER IOD SS 77-025
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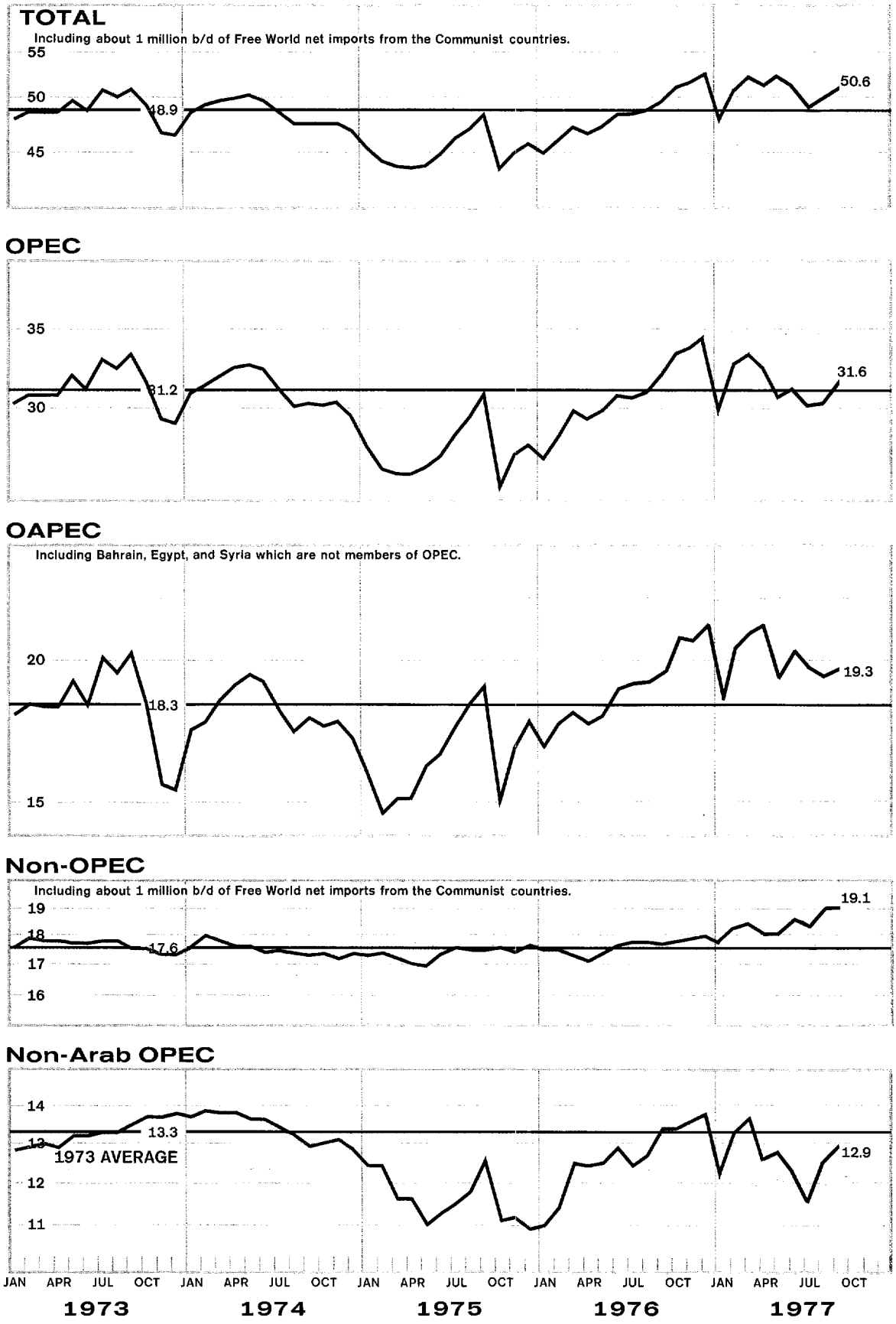
FREE WORLD OIL PRODUCTION[1] MILLION B/D

Semilogarithmic Scale



[1]Including natural gas liquids

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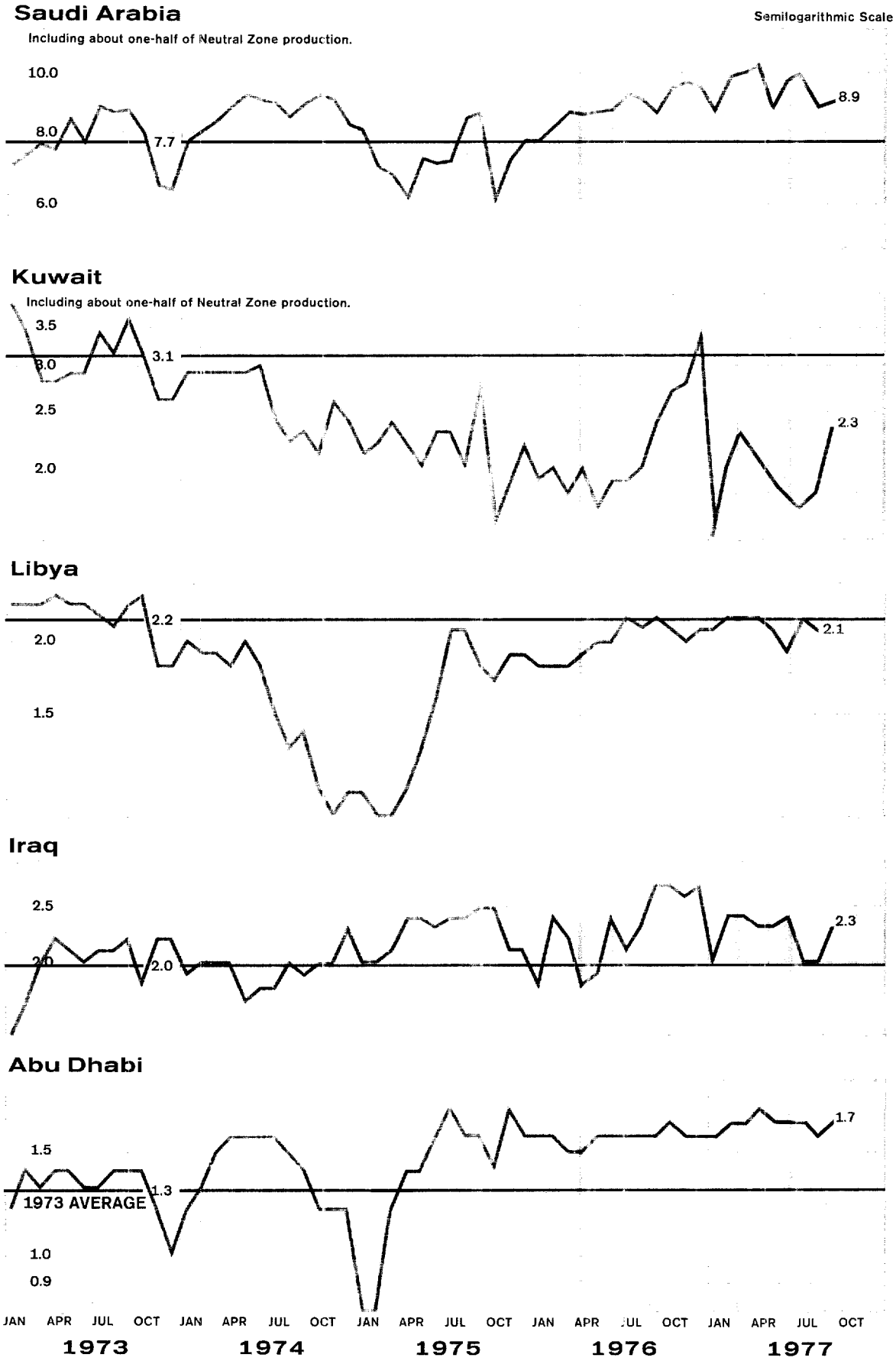
OAPEC OIL PRODUCTION[1] MILLION B/D



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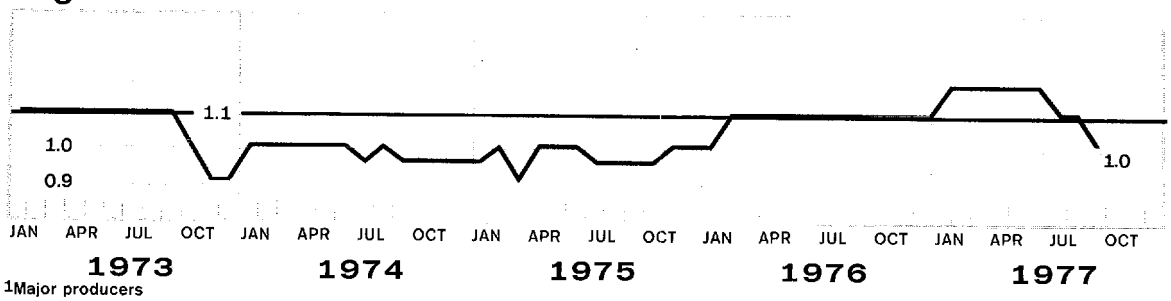
Algeria

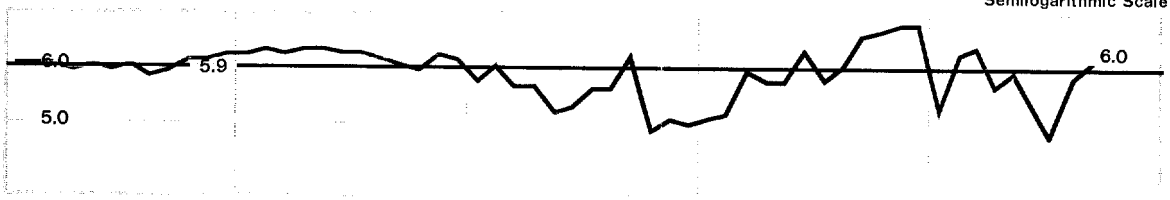


[1]Major producers

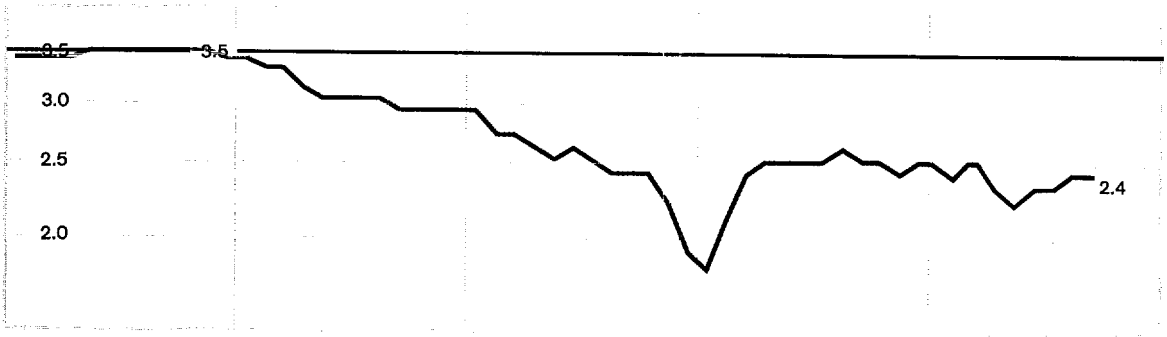
NON-ARAB OPEC OIL PRODUCTION[1] MILLION B/D

Iran

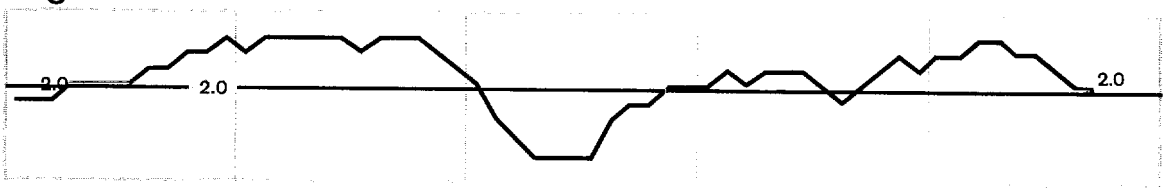
Semilogarithmic Scale



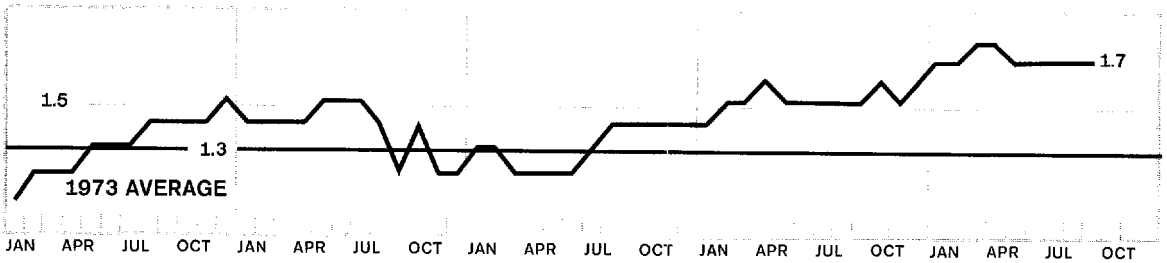
Venezuela



Nigeria



Indonesia



[1]Major producers

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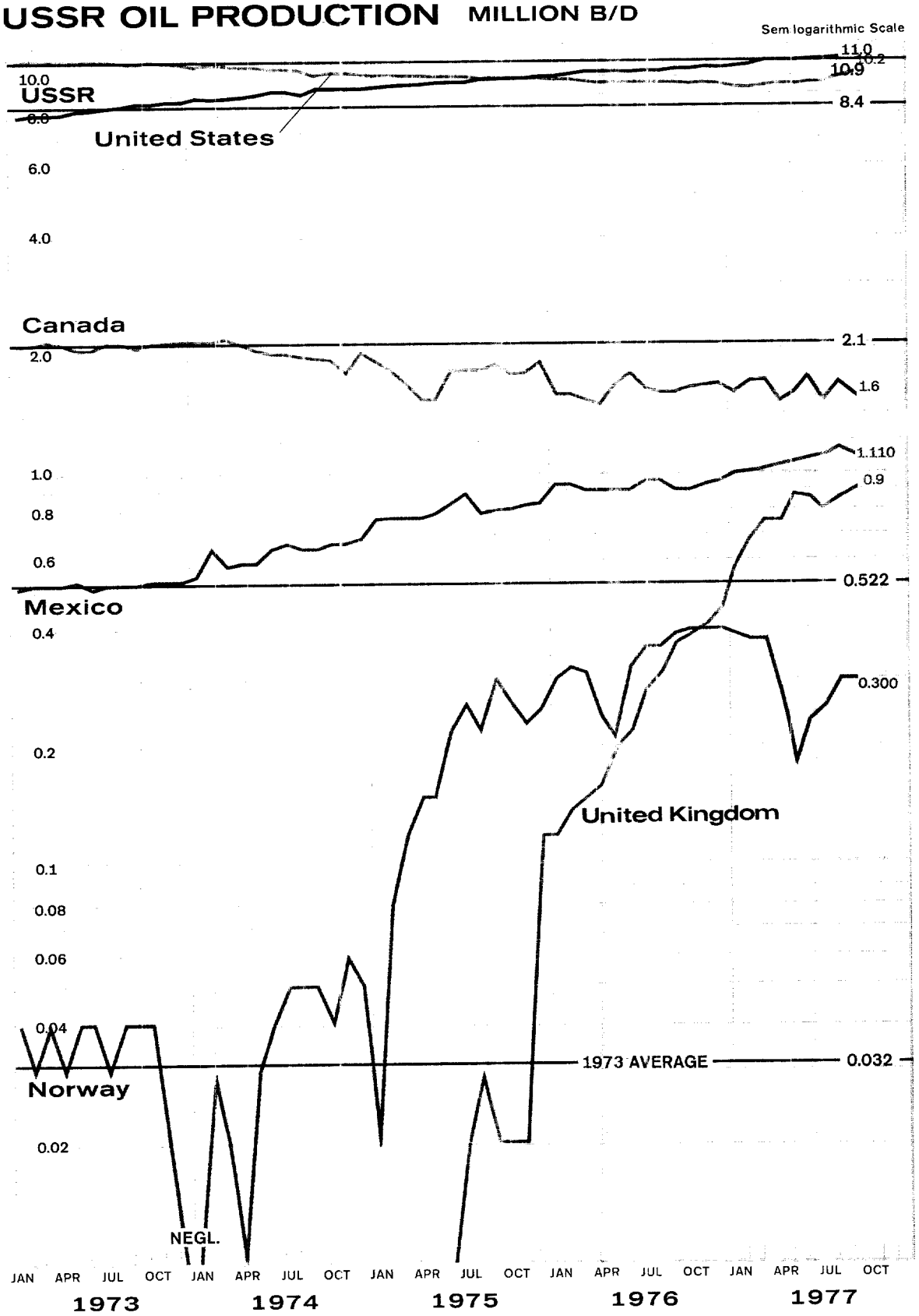
FREE WORLD AND USSR OIL PRODUCTION MILLION B/D



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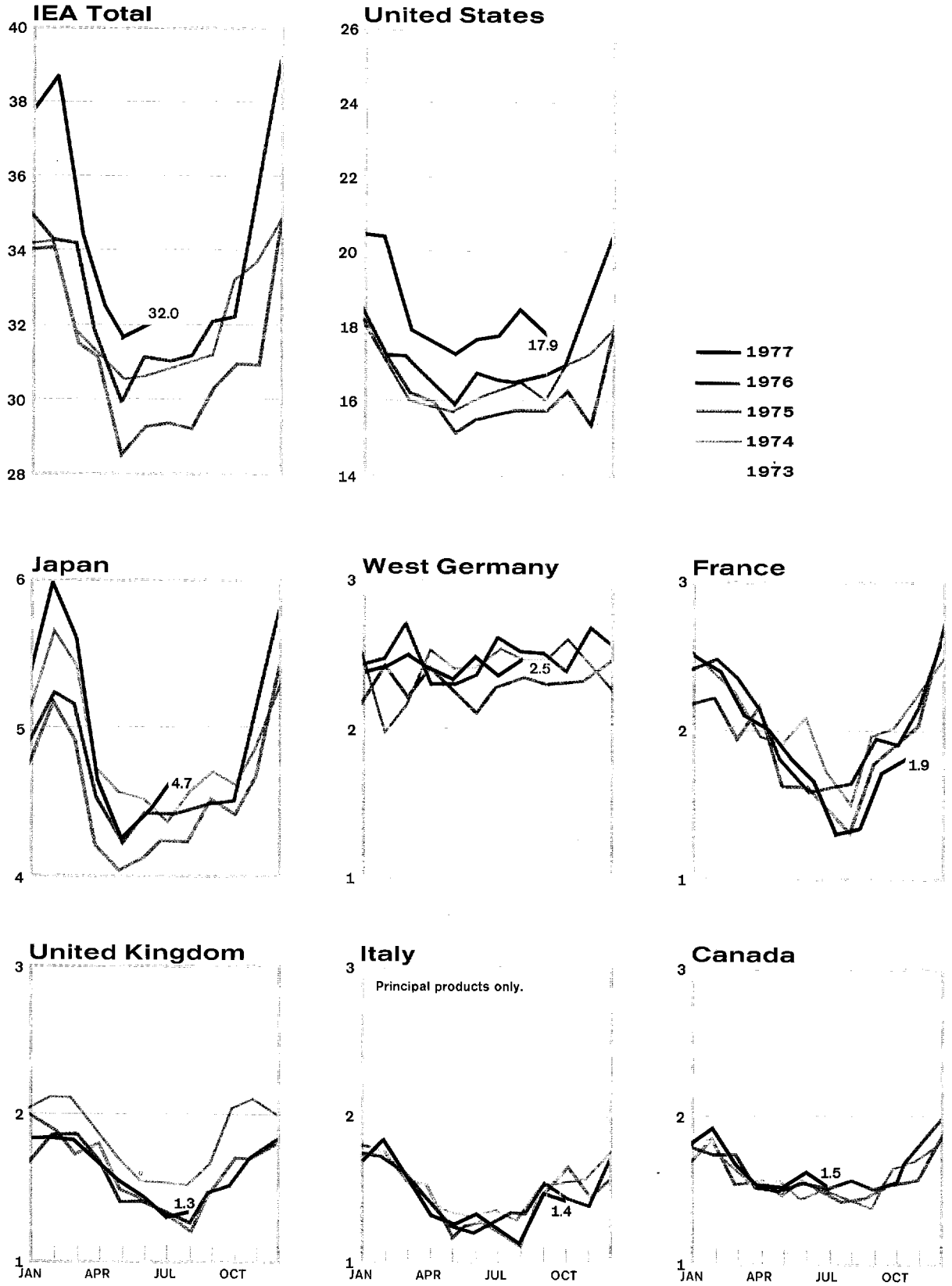
INLAND OIL CONSUMPTION[1] MILLION B/D



[1]Except for the United States, excluding bunkers, refinery fuel, and losses.

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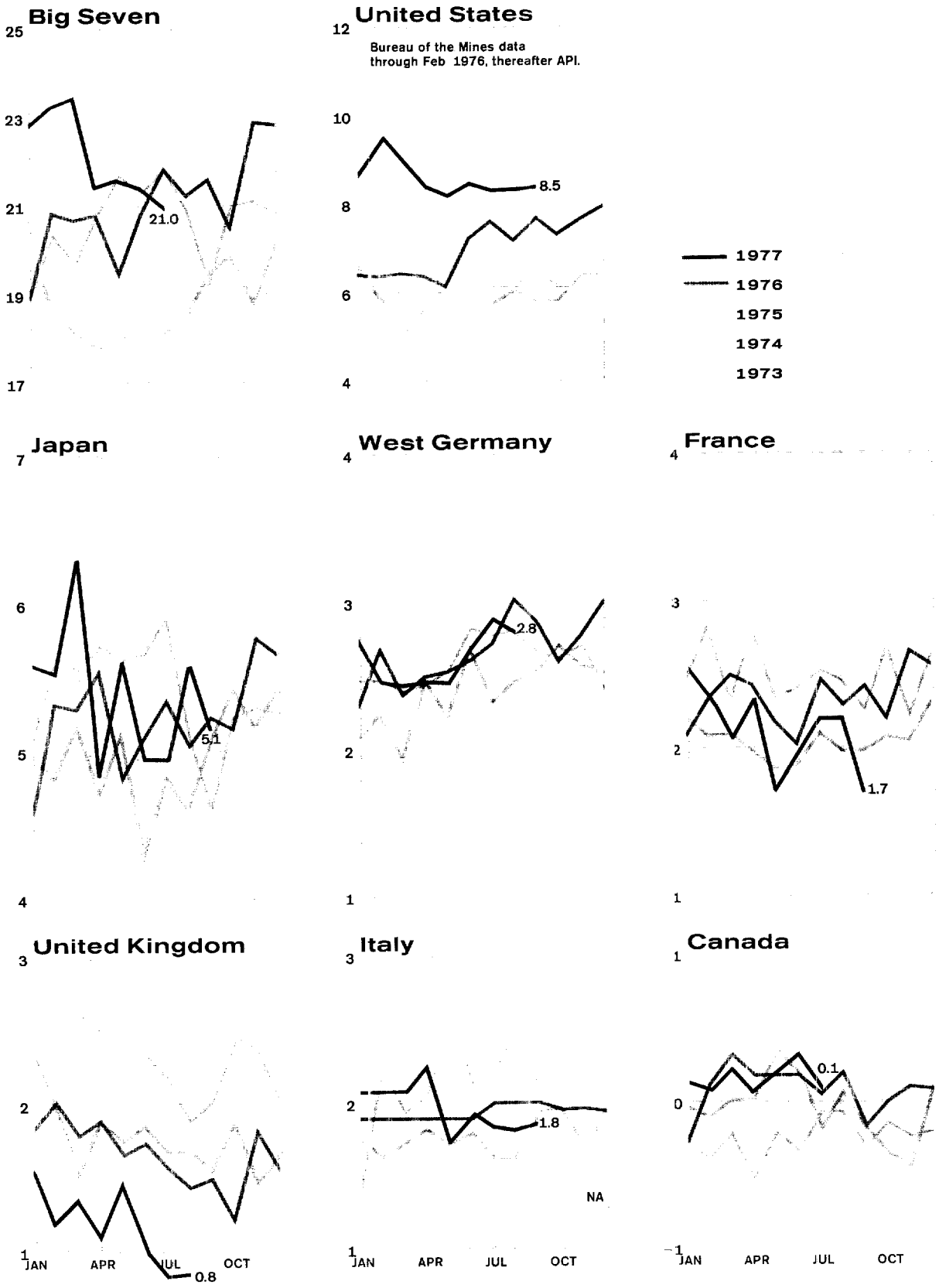
NET OIL IMPORTS MILLION B/D



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World Crude Oil Production, Excluding Natural Gas Liquids

Thousand b/d

					1977					
									Preliminary	
	1973	1974	1975	1976	1st Qtr	2d Qtr	Jul	Aug	Sep	Oct
World	**55,755**	**55,875**	**52,990**	**57,340**	**59,260**	**59,300**	**58,060**	**58,840**	**59,870**	
Free World	**45,850**	**45,145**	**41,470**	**45,100**	**46,510**	**46,400**	**45,080**	**45,820**	**46,870**	
Western hemisphere	16,145	15,290	14,135	13,820	13,840	13,740	13,840	14,350	14,500	
United States [1]	9,210	8,770	8,370	8,120	7,960	8,040	8,190	8,460	8,650	8,610
Venezuela	3,365	2,975	2,345	2,295	2,350	2,170	2,230	2,280	2,360	
Canada [2]	1,800	1,695	1,460	1,300	1,320	1,280	1,130	1,320	1,210	
Mexico [3]	465	580	720	850	900	960	1,000	1,010	1,020	
Argentina	420	410	390	390	430	430	450	450	450	
Ecuador	210	175	160	185	200	190	150	190	140	
Other	675	685	690	680	680	670	690	640	670	
Eastern hemisphere	29,705	29,855	27,335	31,280	32,670	32,660	31,240	31,470	32,370	
Western Europe	370	380	550	855	1,290	1,320	1,300	1,410	1,430	
Norway	30	35	190	280	340	200	220	270	260	
United Kingdom	Negl.	Negl.	20	245	630	800	770	820	860	
Other	340	345	340	330	320	320	310	320	310	
Middle East	21,215	21,855	19,590	22,145	22,300	22,140	21,210	21,140	22,180	
Saudi Arabia [4]	7,595	8,480	7,075	8,575	9,310	9,400	9,800	8,630	8,690	8,650
Iran	5,860	6,020	5,350	5,885	5,790	5,420	4,710	5,660	5,970	5,570
Kuwait [4]	3,020	2,545	2,085	2,145	1,850	1,850	1,630	1,790	2,280	1,840
Iraq	2,020	1,970	2,260	2,415	2,230	2,330	2,000	2,000	2,300	2,200
United Arab Emirates	1,535	1,680	1,665	1,935	2,010	2,070	2,050	1,930	1,990	
Abu Dhabi	1,305	1,410	1,370	1,585	1,660	1,720	1,720	1,600	1,650	
Dubai	230	240	255	310	320	320	310	310	320	
Sharjah	0	30	40	40	40	30	20	20	20	
Qatar	570	520	440	495	420	410	390	500	340	520
Oman	295	290	340	365	370	350	330	330	310	
Syria	100	120	185	200	200	190	180	180	180	
Other	220	230	190	130	120	120	120	120	120	
Africa	5,900	5,370	4,980	5,800	6,330	6,420	5,940	6,140	6,010	
Nigeria	2,055	2,255	1,785	2,070	2,220	2,240	2,060	2,020	2,030	1,950
Libya	2,175	1,520	1,480	1,935	2,130	2,150	1,890	2,130	2,030	2,100
Algeria	1,070	960	960	990	1,070	1,060	1,000	1,000	950	
Gabon	150	200	225	225	220	220	230	230	230	230
Egypt	165	145	250	330	370	430	440	440	450	
Angola/Cabinda	160	170	140	110	170	160	160	160	160	
Other	125	120	140	140	150	160	160	160	160	
Asia-Pacific	2,220	2,250	2,215	2,480	2,750	2,780	2,790	2,780	2,750	
Australia	370	390	410	425	430	430	440	440	420	
Indonesia	1,340	1,375	1,305	1,505	1,690	1,700	1,690	1,680	1,670	1,640
Malaysia-Brunei	320	290	300	330	380	400	410	410	410	
Other	190	195	200	220	250	250	250	250	250	
Communist Countries	**9,905**	**10,730**	**11,520**	**12,240**	**12,750**	**12,900**	**12,980**	**13,020**	**13,000**	
USSR	8,420	9,020	9,630	10,170	10,510	10,660	10,740	10,780	10,760	
China	1,090	1,310	1,490	1,670	1,840	1,840	1,840	1,840	1,840	
Romania	285	290	290	290	290	290	290	290	290	
Other	110	110	110	110	110	110	110	110	110	

[1] Natural gas liquids amounted to an estimated 1.6 million b/d in Sep.
[2] Natural gas liquids amounted to an estimated 340,000 b/d in Sep.
[3] Natural gas liquids amounted to an estimated 95,000 b/d in Sep.
[4] Including about one-half of Neutral Zone crude oil production, which amounted to about 360,000 b/d in Oct.

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Free World Crude Oil Production, Including Natural Gas Liquids

Thousand b/d

	1973	1974	1975	1976	1977 1st Qtr	1977 2d Qtr	1977 Jul	1977 Aug	1977 Sep	1977 Oct
Free World [1]	**48,975**	**48,565**	**44,970**	**48,945**	**50,260**	**50,150**	**48,830**	**49,570**	**50,620**	
Non-OPEC Producers [1]	**17,665**	**17,505**	**17,425**	**17,780**	**18,190**	**18,360**	**18,420**	**18,950**	**19,060**	
United States	10,950	10,460	10,000	9,725	9,540	9,620	9,770	10,040	10,230	10,190
Canada	2,120	2,005	1,770	1,620	1,660	1,620	1,470	1,660	1,550	
United Kingdom	Negl.	Negl.	25	285	680	850	820	870	910	
Norway	30	35	195	300	375	235	255	305	295	
Mexico	535	660	800	935	995	1,055	1,095	1,105	1,115	
Other [2]	3,530	3,545	3,735	3,815	4,040	4,080	4,110	4,070	4,060	
OPEC	**31,310**	**31,060**	**27,545**	**31,165**	**32,070**	**31,790**	**30,410**	**30,620**	**31,560**	
Saudi Arabia [3]	7,685	8,610	7,215	8,760	9,510	9,600	10,000	8,830	8,890	8,850
Kuwait [3]	3,080	2,595	2,135	2,200	1,910	1,910	1,690	1,850	2,340	1,900
Libya	2,210	1,540	1,510	1,970	2,165	2,185	1,925	2,165	2,065	2,135
Iraq	2,020	1,970	2,260	2,415	2,235	2,335	2,005	2,005	2,305	2,205
United Arab Emirates	1,535	1,680	1,665	1,935	2,020	2,080	2,060	1,940	2,000	
Abu Dhabi	1,305	1,410	1,370	1,585	1,670	1,730	1,730	1,610	1,660	
Dubai	230	240	255	310	310	320	310	310	320	
Sharjah	0	30	40	40	40	30	20	20	20	
Algeria	1,100	1,010	1,020	1,075	1,170	1,160	1,100	1,100	1,050	
Qatar	570	525	450	505	430	420	400	510	350	530
Iran	5,900	6,065	5,395	5,930	5,840	5,470	4,760	5,710	6,020	5,620
Venezuela	3,455	3,060	2,420	2,370	2,430	2,250	2,310	2,360	2,440	
Nigeria	2,055	2,255	1,785	2,070	2,220	2,240	2,060	2,020	2,030	1,950
Indonesia	1,340	1,375	1,305	1,525	1,720	1,730	1,720	1,710	1,700	
Gabon	150	200	225	225	220	220	230	230	230	230
Ecuador	210	175	160	185	200	190	150	190	140	

[1] Free World and Non-OPEC Producers totals include net Communist imports of about 500,000 b/d in 1973, 800,000 b/d in 1974, 900,000 b/d in 1975, 1,100,000 b/d in 1976, and 900,000 b/d in 1977.

[2] Including Bahrain, Egypt, and Syria.

[3] Including about one-half of Neutral Zone production.

World Natural Gas Liquids (NGL) Production [1]

Thousand b/d

	1973	1974	1975	1976	1977
World	**2,845**	**2,860**	**2,855**	**3,010**	**3,125**
Free World	**2,625**	**2,620**	**2,600**	**2,745**	**2,850**
OPEC	**345**	**385**	**410**	**510**	**580**
Non-OPEC	**2,280**	**2,235**	**2,190**	**2,235**	**2,270**
Western Hemisphere	2,275	2,220	2,150	2,140	2,150
United States	1,740	1,690	1,630	1,605	1,580
Venezuela	90	85	75	75	80
Canada	320	310	310	320	340
Mexico	70	80	80	85	95
Other	55	55	55	55	55
Eastern Hemisphere	350	400	450	605	700
Western Europe	35	35	45	95	120
Norway	0	0	5	20	35
United Kingdom	0	0	15	40	50
Other	35	35	35	35	35
Middle East	190	230	245	295	335
Saudi Arabia	90	130	140	185	200
Iran	40	45	45	45	50
Kuwait	60	50	50	55	60
Qatar	0	5	10	10	10
Abu Dhabi	0	0	0	0	10
Iraq	0	0	0	0	5
Africa	65	70	90	120	135
Libya	35	20	30	35	35
Algeria	30	50	60	85	100
Asia-Pacific	60	65	70	95	110
Australia	50	50	50	55	60
Indonesia	0	0	0	20	30
Other	10	15	20	20	20
Communist Countries	**220**	**240**	**255**	**265**	**275**
USSR	210	230	240	250	260
China	N.A.	N.A.	N.A.	N.A.	N.A.
Other	10	10	15	15	15

[1] Estimated.

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OAPEC [1] and OPEC [2] Countries: Crude Oil Production

Thousand b/d

	1973	1974	1975	1976	1977 1st Qtr	1977 2d Qtr	1977 Jul	1977 Aug	1977 Preliminary Sep
Total OAPEC (thousand b/d)	**18,090**	**17,735**	**16,165**	**18,730**	**19,300**	**19,600**	**19,110**	**18,320**	**18,920**
% change from Sep 1973 [3]		−11	−19	−7	−4	−2	−5	−9	−6
% change from Dec 1976 [4]					−8	−7	−9	−13	−10
Total OPEC (thousand b/d)	**30,965**	**30,675**	**27,135**	**30,655**	**31,490**	**31,210**	**29,830**	**30,040**	**30,980**
% change from Sep 1973 [3]		−7	−18	−7	−4	−5	−9	−9	−6
% change from Dec 1976 [4]					−8	−8	−12	−12	−9

[1] The members of the Organization of Arab Petroleum Exporting Countries are Abu Dhabi, Algeria, Bahrain, Egypt, Iraq, Kuwait, Libya, Qatar, Saudi Arabia, and Syria.

[2] The membership of the Organization of Petroleum Exporting Countries consists of OAPEC members (excluding Bahrain, Egypt, and Syria), plus Dubai, Ecuador, Gabon, Indonesia, Iran, Nigeria, Sharjah, and Venezuela.

[3] In Sep 1973, the pre-crisis level of output, OAPEC countries produced 20,038 b/d and OPEC countries 32,956 b/d.

[4] In Dec 1976, the post-crisis peak of output, OAPEC countries produced 21,060 b/d and OPEC countries 34,070 b/d.

OAPEC and OPEC Countries: Crude Oil Production Capacity

Thousand b/d

	Estimated Productive Capacity [1]	Underutilization of Productive Capacity: Aug	Underutilization of Productive Capacity: Sep
Saudi Arabia [2]	10,500	1,870	1,810
Kuwait [2]	3,300	1,510	1,020
Libya	2,300	170	270
Iraq	3,000	1,000	700
Abu Dhabi	2,000	400	350
Algeria	1,080	80	130
Qatar	600	100	260
Egypt	450	10	0
Syria	200	20	20
Bahrain	60	10	10
Total OAPEC	**23,490**	**5,170**	**4,570**
Iran	6,700	1,040	730
Venezuela	2,600	320	240
Nigeria	2,300	280	270
Indonesia	1,700	20	30
Dubai	340	30	20
Gabon	250	20	20
Ecuador	225	35	85
Sharjah	50	30	30
Total OPEC [3]	**36,945**	**6,905**	**5,965**

[1] Estimated at maximum efficient rate (MER) of production. In some cases output can exceed the MER for short periods of time without damaging the fields.

[2] Including about one-half of Neutral Zone capacity production.

[3] OAPEC members (excluding Bahrain, Egypt, and Syria), plus the other countries shown.

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A Note on Petroleum Reserves

Any estimate of oil and natural gas reserves must be treated as rough approximation. Few countries publish official reserve estimates, and there is no consistent rigorous definition of reserves. Moreover, the volume of oil and/or gas in place, even in a well-delineated field, can never be precisely accurate; estimates of commercially recoverable oil and natural gas are usually made not by reference to existing technology but by reference to the production system currently in use, and even this can provide only an approximation. Assessments of proved reserves therefore do not mean absolute world availability; they are only an indication of the quantity of oil that is technically and economically feasible to extract with current techniques at current prices.

CIA's reserve figures are for *proved and probable* reserves and are based on the best available published information and on our own judgemental analysis in cases where we have unique information. CIA uses the restrictive definition of *probable* reserves (as differentiated from *possible* reserves) common in the industry. Our *proved and probable* figure does not differ greatly from the *proved* figure in many cases, such as Venezuela, Iran, and Libya. In these countries, extensive exploration has taken place and extentions of known fields are considered unlikely. In other cases—such as Saudi Arabia, Mexico, and the United Kingdom—differences between *proved* and *proved and probable* reserves are considerably larger.

Estimated Proved and Probable Petroleum Reserves

Area and Country	Crude Oil Billion Barrels	Natural Gas Trillion Cubic Feet
World	**665**	**2,626** [1]
Free World	**600**	**1,764**
Western Hemisphere	96	426
United States [2]	39	219
Mexico	25	43
Venezuela	14	43
Canada [2]	8	71
Ecuador	2	11
Argentina	2	11
Brazil	1	7
Colombia	1	7
Peru	2	7
Trinidad and Tobago	2	7
Eastern Hemisphere	504	1,338
Middle East	392	845
Saudi Arabia	158	106
Kuwait	71	35
Iran [3]	60	600
Iraq	36	35
United Arab Emirates	34	35
Neutral Zone	17	7
Qatar	7	18
Oman	6	3
Syria	2	3
Other	1	3
Africa	59	211
Libya	25	25
Nigeria	19	46
Algeria	7	127
Egypt	4	3
Gabon	1	Negl.
Angola-Cabinda	1	Negl.
Tunisia	1	7
Other	1	3
Western Europe	31	177
United Kingdom	20	46
Norway	8	25
Netherlands	Negl.	71
Spain	1	Negl.
Other	2	35
Asia-Pacific	22	105
Indonesia	14	21
Brunei	2	11
Malaysia	2	14
Australia	2	35
India	2	3
Pakistan	Negl.	21
Communist Countries	**65**	**862**
USSR	40	812
China	20	25
Other	5	25

[1] Equivalent to 470 billion barrels of oil.
[2] Including Arctic gas deposits and natural gas liquids.
[3] Including recent discoveries.

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Estimated Imports of Crude Oil and Refined Products
1976

Thousand b/d

	US [1]	Japan	Canada	Western Europe	West Germany	France	UK	Italy	Netherlands	Belgium/Luxembourg	Spain	Other Western Europe
Algeria	437	2	14	443	213	94	19	70	3	3	28	13
Bahrain	3	32	0	8	1	0	6	0	1	0	0	0
Egypt	17	1	2	141	1	13	8	0	11	1	0	107
Iraq	38	128	33	1,222	35	327	105	318	34	1	87	315
Kuwait	9	450	6	702	38	86	229	13	111	8	58	159
Libya	532	41	25	1,135	424	63	57	237	12	0	89	253
Qatar	69	6	0	300	24	58	94	22	50	0	0	52
Saudi Arabia	1,371	1,719	122	3,445	379	877	370	516	354	293	376	280
Syria	1	0	0	107	23	53	3	0	0	28	0	0
United Arab Emirates	319	530	16	789	138	234	74	20	115	26	0	182
Total OAPEC	**2,796**	**2,909**	**218**	**8,292**	**1,276**	**1,805**	**965**	**1,196**	**691**	**360**	**638**	**1,361**
Ecuador	63	0	2	0	0	0	0	0	0	0	0	0
Gabon	46	0	12	65	11	29	1	0	3	0	21	0
Indonesia	573	613	0	7	3	0	0	0	0	0	0	4
Iran	548	974	162	2,440	383	291	399	290	327	73	179	498
Nigeria	1,124	17	36	723	181	155	76	16	195	30	0	70
Venezuela	985	6	302	238	38	36	41	26	11	3	23	60
Total OPEC [2]	**6,114**	**4,486**	**730**	**11,509**	**1,867**	**2,250**	**1,465**	**1,528**	**1,215**	**437**	**861**	**1,886**
Canada	599	0	0	6	0	0	0	0	0	0	0	6
Mexico	91	0	0	Negl.	0	0	0	0	0	0	0	Negl.
Other	470	716	24	1,757 [3,4]	917	282	570	740	208	288	123	897
Total	**7,295**	**5,235**	**756**	**13,528**	**2,809**	**2,598**	**2,052**	**2,268**	**1,435**	**754**	**984**	**2,896**

[1] Products traced to source of crude oil.
[2] OAPEC members excluding Bahrain, Egypt, and Syria plus other countries shown.
[3] Because of intra-European trade, components do not add to the totals shown.
[4] Other and unknown.

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Selected Developed Countries: Crude Oil Imports, by Source

	Thousand b/d									Percent of Total	
	Sep 1973 (Pre-Crisis Level)	1974	1975	1976	1977 1st Qtr	1977 Apr	1977 May	1977 Jun [1]	1977 Jul	Sep 1973	Jul 1977
United States [2]											
Algeria	124	180	264	408	527	654	381	424	555	3.6	8.2
Egypt	0	9	5	17	12	16	32	0	NA	0	0
Iraq	17	0	2	26	28	52	168	92	100	0.5	1.5
Kuwait	44	5	4	1	64	67	51	66	50	1.3	0.7
Libya	153	4	223	444	641	776	749	799	625	4.4	9.2
Qatar	41	17	18	24	39	34	94	84	90	1.2	1.3
Saudi Arabia	599	438	701	1,222	1,371	1,429	1,716	1,410	1,342	17.3	19.8
United Arab Emirates [3]	88	69	117	255	336	324	237	425	280	2.5	4.1
Other [4]	0	0	0	0	6	0	0	0	0	0	0
Total OAPEC	**1,066**	**722**	**1,334**	**2,397**	**3,024**	**3,352**	**3,478**	**3,300**	**3,042**	**30.7**	**44.9**
Ecuador	33	42	57	51	51	53	77	95	32	0.9	0.5
Gabon	0	23	27	26	37	26	42	6	38	0	0.6
Indonesia	249	284	379	536	565	474	480	637	480	7.2	7.1
Iran	205	463	278	298	518	517	535	527	835	5.9	12.3
Nigeria	409	697	746	1,014	1,278	1,238	1,060	1,130	477	11.8	7.0
Venezuela	405	319	395	241	173	285	251	341	326	11.7	4.8
Total OPEC [5]	**2,367**	**2,541**	**3,211**	**4,546**	**5,628**	**5,929**	**5,841**	**6,036**	**5,930**	**68.2**	**87.5**
Canada	998	791	600	371	282	313	248	267	238	28.8	3.5
Mexico	8	2	70	87	144	145	174	158	159	0.2	2.3
UK	0	0	Negl.	13	86	35	50	NA	NA	0	NA
Norway	0	1	12	35	54	0	59	NA	NA	0	NA
Other	98	133	207	218	308	347	367	482	454	2.8	6.7
Total	**3,471**	**3,477**	**4,105**	**5,287**	**6,520**	**6,785**	**6,821**	**6,943**	**6,781**	**100.0**	**100.0**

	Thousand b/d								
	Sep 1973 (Pre-Crisis Level)	1974	1975	1976	1977 1st Qtr	1977 2d Qtr	1977 Jul	Percent of Total Sep 1973	Percent of Total Jul 1977
Canada									
Algeria	0	12	Negl.	0	0	0	0	0	0
Egypt	0	0	0	0	0	0	0	0	0
Iraq	23	10	31	29	17	6	36	2.4	5.9
Kuwait	0	25	29	2	0	0	0	0	0
Libya	56	9	9	20	0	0	0	6.0	0
Qatar	0	0	2	0	0	0	0	0	0
Saudi Arabia	82	91	165	109	188	168	145	8.7	23.6
United Arab Emirates [3]	49	24	46	57	4	11	1	5.2	0.2
Other [4]	0	0	0	0	0	0	0	0	0
Total OAPEC	**210**	**171**	**282**	**217**	**209**	**185**	**182**	**22.3**	**29.6**
Ecuador	13	6	1	0	0	0	0	1.4	0
Gabon	0	0	3	0	0	0	0	0	0
Indonesia	0	0	0	0	0	0	0	0	0
Iran	149	199	202	157	145	126	94	15.9	15.3
Nigeria	39	14	17	28	11	7	0	4.1	0
Venezuela	485	351	265	269	268	262	215	51.6	35.0
Total OPEC [5]	**896**	**741**	**770**	**671**	**628**	**580**	**491**	**95.3**	**80.0**
Other	44	79	54	49	83	109	123	4.7	20.0
Total	**940**	**820**	**824**	**720**	**711**	**689**	**614**	**100.0**	**100.0**

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Selected Developed Countries: Crude Oil Imports, by Source (Continued)

	Thousand b/d									Percent of Total	
	Sep 1973 (Pre-Crisis Level)	1974	1975	1976	1977 1st Qtr	1977 2d Qtr	1977 Jul	1977 Aug	1977 Sep	Sep 1973	Sep 1977
Japan											
Algeria	0	5	6	0	0	4	0	11	0	0	0
Egypt	0	2	0	Negl.	0	0	0	0	0	0	0
Iraq	0	40	92	127	162	162	318	132	59	0	1.3
Kuwait	488	479	416	342	350	399	255	403	513	10.0	11.5
Libya	31	70	59	41	11	35	13	21	13	0.6	0.3
Qatar	0	6	3	2	28	21	0	51	30	0	0.7
Saudi Arabia	1,148	1,304	1,355	1,572	1,846	1,429	1,445	1,723	1,407	23.5	31.6
United Arab Emirates [3]	511	533	408	530	586	494	486	579	493	10.5	11.1
Other [4]	0	0	0	0	0	0	0	0	0	0	0
Total OAPEC	**2,181**	**2,439**	**2,339**	**2,614**	**2,983**	**2,544**	**2,517**	**2,920**	**2,515**	**44.7**	**56.5**
Ecuador	0	0	0	0	0	0	0	0	0	0	0
Gabon	0	0	0	0	0	0	0	0	0	0	0
Indonesia	638	671	518	553	669	665	628	706	654	13.1	14.7
Iran	1,554	1,222	1,147	928	957	771	666	824	729	31.9	16.4
Nigeria	101	87	71	17	0	0	0	0	0	2.1	0
Venezuela	7	9	5	6	7	7	7	0	10	0.1	0.2
Total OPEC [5]	**4,481**	**4,426**	**4,080**	**4,118**	**4,616**	**3,987**	**3,818**	**4,450**	**3,908**	**91.9**	**87.8**
Other	397	370	459	483	568	485	580	490	542	8.1	12.2
Total	**4,878**	**4,798**	**4,539**	**4,601**	**5,184**	**4,472**	**4,398**	**4,940**	**4,450**	**100.0**	**100.0**

	Thousand b/d								Percent of Total	
	Sep 1973 (Pre-Crisis Level)	1974	1975	1976	1977 1st Qtr	1977 2nd Qtr	1977 Jul	1977 Aug	Sep 1973	Aug 1977
United Kingdom										
Abu Dhabi	28	86	47	29	35	44	45	41	1.5	3.2
Algeria	46	10	29	18	14	8	12	12	2.4	1.0
Egypt	0	5	16	3	0	11	37	0	0	0
Iraq	67	64	52	105	114	110	50	80	3.5	6.3
Kuwait	293	343	218	229	181	217	183	147	15.3	11.6
Libya	98	175	53	45	20	50	62	32	5.1	2.5
Qatar	73	96	77	94	78	24	34	20	3.8	1.6
Saudi Arabia	530	712	444	370	405	457	361	275	27.6	21.8
Other [4]	0	0	16	3	0	0	0	0	0	0
Total OAPEC	**1,135**	**1,491**	**952**	**896**	**847**	**921**	**784**	**607**	**59.2**	**48.1**
Dubai	48	26	30	45	36	36	14	74	2.5	5.9
Ecuador	0	0	0	0	0	0	0	0	0	0
Gabon	0	14	0	0	0	0	0	0	0	0
Indonesia	0	0	0	0	0	0	0	0	0	0
Iran	317	290	351	398	414	269	145	243	16.5	19.2
Nigeria	188	158	117	76	70	13	16	18	9.8	1.4
Sharjah	0	0	0	0	0	0	0	0	0	0
Venezuela	66	66	64	29	16	22	18	33	3.4	2.6
Total OPEC [5]	**1,754**	**2,040**	**1,482**	**1,438**	**1,383**	**1,250**	**940**	**975**	**91.5**	**77.2**
Other	163	226	261	326	263	240	170	288	8.5	22.8
Total	**1,917**	**2,271**	**1,775**	**1,770**	**1,646**	**1,501**	**1,147**	**1,263**	**100.0**	**100.0**

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Selected Developed Countries: Crude Oil Imports, by Source (Continued)

	Thousand b/d									
	Sep 1973 (Pre-Crisis Level)	1974	1975	1976	1977 1st Qtr	1977 2d Qtr	1977 Jul	1977 Aug	Percent of Total Sep 1973	Percent of Total Aug 1977
West Germany										
Algeria	239	201	204	210	227	164	215	234	10.4	11.2
Egypt	0	0	4	0	0	0	0	0	0	0
Iraq	43	73	28	35	31	21	0	60	1.9	2.9
Kuwait	102	82	54	25	24	16	0	8	4.4	0.4
Libya	418	320	296	421	470	354	408	380	18.2	18.1
Qatar	18	20	25	24	13	24	0	47	0.8	2.2
Saudi Arabia	710	514	371	378	376	404	545	474	30.9	22.6
United Arab Emirates [3]	162	169	158	125	155	156	140	221	7.1	10.5
Other [4]	26	19	16	25	22	25	26	52	1.1	2.5
Total OAPEC	**1,718**	**1,398**	**1,156**	**1,243**	**1,318**	**1,164**	**1,334**	**1,476**	**74.8**	**70.4**
Ecuador	0	0	0	0	0	0	0	0	0	0
Gabon	32	19	21	11	7	10	0	0	1.4	0
Indonesia	0	0	0	4	25	8	1	7	0	0.3
Iran	248	265	284	380	338	319	288	242	10.8	11.5
Nigeria	168	241	202	181	162	177	227	138	7.3	6.6
Venezuela	42	38	43	28	16	18	31	9	1.8	0.4
Total OPEC [5]	**2,182**	**1,942**	**1,686**	**1,822**	**1,844**	**1,671**	**1,855**	**1,820**	**95.0**	**86.8**
UK	0	0	0	14	52	66	51	89	0	4.2
Norway	Negl.	3	12	23	38	12	27	48	0	2.3
Other	89	86	89	95	62	81	83	88	3.9	4.2
Total	**2,297**	**2,050**	**1,807**	**1,979**	**2,018**	**1,855**	**2,042**	**2,097**	**100.0**	**100.0**

	Thousand b/d										
	Sep 1973 (Pre-Crisis Level)	1974	1975	1976	1977 1st Qtr	1977 2d Qtr	1977 Jul	1977 Aug	1977 Sep	Percent of Total Sep 1973	Percent of Total Sep 1977
France											
Abu Dhabi	249	268	210	202	186	214	158	147	222	9.0	12.3
Algeria	227	181	118	95	99	92	81	107	98	8.2	5.4
Egypt	1	0	4	13	11	8	0	0	0	Negl.	0
Iraq	375	330	240	335	379	274	436	447	169	13.6	9.3
Kuwait	316	246	134	86	103	57	84	59	0	11.4	0
Libya	131	74	44	62	38	42	74	46	64	4.7	3.5
Qatar	69	70	47	58	84	35	59	60	25	2.5	1.4
Saudi Arabia	623	842	669	870	832	813	834	987	830	22.5	45.9
Other [4]	12	10	41	60	49	60	60	18	23	0.4	1.3
Total OAPEC	**2,003**	**2,021**	**1,507**	**1,781**	**1,781**	**1,595**	**1,786**	**1,871**	**1,431**	**72.5**	**79.1**
Dubai	27	36	43	33	52	31	41	62	0	1.0	0
Ecuador	0	0	0	0	0	0	0	0	0	0	0
Gabon	33	43	27	29	53	44	42	36	57	1.2	3.1
Indonesia	0	0	0	0	0	0	0	0	0	0	0
Iran	216	174	266	294	336	197	102	85	11	7.8	0.6
Nigeria	253	208	175	150	127	160	168	150	119	9.2	6.6
Sharjah	0	0	0	0	0	0	0	0	0	0	0
Venezuela	36	28	15	16	10	14	17	31	15	1.3	0.8
Total OPEC [5]	**2,555**	**2,500**	**1,988**	**2,230**	**2,299**	**1,973**	**2,096**	**2,217**	**1,610**	**92.4**	**89.0**
UK	0	0	0	7	0	28	37	31	24	0	1.3
Norway	0	2	18	46	0	22	17	14	15	0	0.8
Other	196	92	69	61	113	91	79	80	138	7.1	7.6
Total	**2,764 [4]**	**2,604**	**2,120**	**2,417**	**2,472**	**2,182**	**2,289**	**2,360**	**1,810**	**100.0**	**100.0**

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Selected Developed Countries: Crude Oil Imports, by Source (Continued)

	Thousand b/d						Percent of Total	
	4th Qtr 1973 (Pre-Crisis Level)	1974	1975	1976	1977 1st Qtr	1977 2d Qtr	4th Qtr 1973	2d Qtr 1977
Italy								
Algeria	61	49	77	51	22	20	2.4	0.9
Egypt	0	0	0	0	0	0	0	0
Iraq	383	269	374	312	331	327	15.2	15.0
Kuwait	212	130	82	47	167	114		5.3
Libya	597	478	260	340	302	328	23.7	15.0
Qatar	21	57	26	26	24	20	0.8	0.9
Saudi Arabia	692	824	527	545	605	694	27.5	31.8
United Arab Emirates [2]	0	13	33	50	99	34	0	1.6
Other [3]	0	0	0	0	0	0	0	0
Total OAPEC	**1,966**	**1,820**	**1,379**	**1,371**	**1,550**	**1,537**	**78.2**	**70.5**
Ecuador	0	0	0	0	0	0	0	0
Gabon	3	10	6	1	10	0	0.1	0
Indonesia	0	0	0	0	0	0	0	0
Iran	277	301	258	292	250	296	11.0	13.6
Nigeria	9	63	7	7	10	18	0.4	0.8
Venezuela	18	13	20	16	12	34	0.7	1.6
Total OPEC [4]	**2,273**	**2,207**	**1,670**	**1,687**	**1,832**	**1,885**	**90.4**	**86.5**
UK	0	0	0	13	4	0	0	0
Norway	0	0	0	0	0	0	0	0
Other [6]	241	190	271	371	348	295	9.6	13.5
Total	**2,514**	**2,397**	**1,941**	**2,071**	**2,184**	**2,180**	**100.0**	**100.0**

[1] As of June, data are obtained from the Monthly Petroleum Statistics Report, Department of Energy.
[2] Including oil imports from Abu Dhabi and possibly from Dubai and Sharjah, which are not members of OAPEC.
[3] Including, when applicable, Bahrain and Syria.
[4] Consisting of OAPEC members (excluding Bahrain, Egypt, and Syria) plus the other countries shown.
[5] Estimated.
[6] Including data that cannot be distributed by area of origin.

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Selected Developed Countries: Trends in Oil Trade

Thousand b/d

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual Average
United States [1]													
1973													
Crude imports	2,732	2,873	3,162	3,049	3,215	3,220	3,501	3,593	3,471	3,740	3,452	2,891	3,244
Product imports	3,079	3,501	3,413	2,551	2,603	2,659	2,671	2,913	2,903	2,785	3,412	3,055	3,012
Total imports	5,811	6,374	6,575	5,600	5,818	5,879	6,172	6,506	6,374	6,525	6,864	5,946	6,256
Exports	210	260	224	275	237	215	240	217	242	221	202	227	231
Net imports	5,601	6,114	6,351	5,325	5,581	5,664	5,932	6,289	6,132	6,304	6,662	5,719	6,025
1974													
Crude imports	2,382	2,248	2,462	3,267	3,908	3,925	4,091	3,924	3,797	3,810	3,958	3,869	3,477
Product imports	2,973	2,973	2,753	2,703	2,580	2,493	2,397	2,434	2,225	2,320	2,704	2,853	2,611
Total imports	5,355	5,221	5,215	5,970	6,488	6,418	6,488	6,358	6,022	6,130	6,662	6,722	6,088
Exports	207	203	196	243	247	238	253	247	171	221	186	231	220
Net imports	5,148	5,018	5,019	5,727	6,241	6,180	6,235	6,111	5,851	5,909	6,476	6,491	5,868
1975													
Crude imports	4,029	3,828	3,656	3,378	3,486	3,905	4,192	4,581	4,689	4,389	4,623	4,476	4,105
Product imports	2,832	2,348	2,074	1,662	1,728	1,502	1,767	1,717	2,115	1,940	1,796	1,949	1,951
Total imports	6,861	6,176	5,730	5,040	5,214	5,407	5,959	6,298	6,804	6,329	6,419	6,425	6,056
Exports	228	248	213	190	202	224	186	203	205	187	166	262	209
Net imports	6,633	5,928	5,517	4,850	5,012	5,183	5,773	6,095	6,599	6,142	6,253	6,163	5,847
1976													
Crude imports	4,594	4,208	4,738	4,790	4,669	5,621	5,792	5,556	5,875	5,699	5,955	5,925	5,287
Product imports	2,016	2,423	1,946	1,805	1,654	1,858	2,099	1,826	2,038	1,808	2,115	2,353	2,008
Total imports	6,610	6,631	6,684	6,595	6,323	7,479	7,891	7,382	7,913	7,507	8,070	8,278	7,295
Exports	156	241	185	222	180	213	242	220	196	198	348	309	226
Net imports	6,454	6,390	6,499	6,373	6,143	7,266	7,649	7,162	7,717	7,309	7,720	7,969	7,069
1977													
Crude imports	6,288	6,652	6,633	6,785	6,821	6,947	6,781	6,572	6,580				
Product imports	2,594	3,278	2,529	1,886	1,754	1,855	1,872	2,010	2,170				
Total imports	8,882	9,930	9,162	8,671	8,575	8,802	8,653	8,582	8,750				
Exports	192	234	207	223	288	256	212	228	214				
Net imports	8,690	9,696	8,955	8,448	8,287	8,546	8,441	8,354	8,536				
Canada													
1973													
Crude imports	945	975	932	772	930	741	1,058	937	940	799	934	802	897
Product imports	163	93	55	37	119	121	122	153	105	132	140	149	130
Total imports	1,108	1,068	987	809	1,049	862	1,180	1,090	1,045	931	1,074	951	1,027
Exports	1,357	1,500	1,364	1,472	1,495	1,446	1,162	1,298	1,300	1,363	1,357	1,237	1,364
Net imports	−249	−432	−377	−663	−446	−584	18	−208	−255	−432	−283	−322	−337
1974													
Crude imports	822	988	717	718	971	763	816	817	672	787	798	721	820
Product imports	96	44	142	33	114	125	89	104	58	75	87	74	83
Total imports	918	1,032	859	751	1,085	888	905	921	730	862	885	795	903
Exports	1,180	1,402	1,056	1,266	1,270	1,220	956	978	1,026	988	1,110	981	1,086
Net imports	−262	−370	−197	−515	−185	−332	−51	−57	−296	−126	−225	−186	−183
1975													
Crude imports	1,052	915	849	804	1,067	850	678	946	716	516	562	929	824
Product imports	48	68	27	46	56	56	48	50	40	57	26	27	41
Total imports	1,100	983	876	850	1,123	906	726	996	756	573	588	956	865
Exports	1,122	1,068	834	815	745	702	893	903	936	921	1,017	848	899
Net imports	−22	−85	42	35	378	204	−167	93	−180	−348	−429	108	−34
1976													
Crude imports	738	783	870	802	793	832	825	728	409	565	690	596	720
Product imports	21	26	30	16	45	45	43	54	23	60	50	20	36
Total imports	759	809	900	818	838	877	868	782	432	625	740	616	756
Exports	1,029	669	569	636	650	676	815	571	603	605	625	612	646
Net imports	−270	140	331	182	188	201	53	211	−171	20	115	4	110
1977													
Crude imports	729	645	752	585	679	802	614						
Product imports	28	25	27	19	49	60	37						
Total imports	757	670	779	604	728	862	651						
Exports	611	568	522	526	515	506	523						
Net imports	146	102	257	78	213	356	128						
Japan													
1973													
Crude imports	4,662	4,775	4,830	4,864	4,918	5,043	4,697	5,550	4,878	5,483	5,029	5,139	4,992
Product imports	640	803	650	542	664	640	523	507	443	592	533	486	584
Total imports	5,302	5,578	5,480	5,406	5,582	5,683	5,220	6,057	5,321	6,075	5,562	5,625	5,576
Exports	11	33	23	28	19	13	39	31	21	25	13	25	24
Net imports	5,291	5,545	5,457	5,378	5,563	5,670	5,181	6,026	5,300	6,050	5,549	5,600	5,552
1974													
Crude imports	4,467	5,008	4,886	5,120	4,794	4,878	5,204	4,601	4,214	4,763	4,818	4,834	4,798
Product imports	648	671	684	625	858	823	755	624	531	529	569	597	662
Total imports	5,115	5,679	5,570	5,745	5,652	5,701	5,959	5,225	4,745	5,292	5,387	5,431	5,460
Exports	14	25	16	20	24	17	25	93	135	46	79	179	56
Net imports	5,101	5,654	5,554	5,725	5,628	5,684	5,934	5,132	4,610	5,246	5,308	5,252	5,404

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Selected Developed Countries: Trends in Oil Trade
(Continued)

Thousand b/d

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual Average
Japan (Continued)													
1975													
Crude imports	4,581	4,502	4,773	4,304	4,765	3,956	4,401	4,120	4,637	4,928	4,611	4,880	4,539
Product imports	471	367	466	445	439	361	487	489	461	518	545	574	469
Total imports	5,052	4,869	5,239	4,749	5,204	4,317	4,888	4,609	5,098	5,446	5,156	5,454	5,008
Exports	80	52	40	38	61	40	42	17	5	7	5	6	32
Net imports	4,972	4,817	5,199	4,711	5,143	4,277	4,846	4,592	5,093	5,439	5,151	5,448	4,976
1976													
Crude imports	3,901	4,683	4,586	4,989	4,217	4,469	4,690	4,391	4,492	4,642	5,165	5,019	4,601
Product imports	699	649	704	563	593	637	669	651	747	504	615	634	634
Total imports	4,600	5,332	5,290	5,552	4,810	5,106	5,359	5,042	5,239	5,146	5,780	5,653	5,235
Exports	3	5	9	4	4	5	5	6	9	4	9	6	6
Net imports	4,597	5,327	5,281	5,548	4,806	5,101	5,354	5,036	5,230	5,142	5,771	5,647	5,229
1977													
Crude imports	5,023	4,857	5,671	4,210	4,955	4,234	4,398	4,940	4,450				
Product imports	584	686	665	632	682	729	561	644	705				
Total imports	5,607	5,543	6,336	4,842	5,637	4,963	4,959	5,584	5,155				
Exports	7	8	8	6	4	11	8	5	7				
Net imports	5,600	5,535	6,328	4,836	5,633	4,952	4,951	5,579	5,148				
France													
1973													
Crude imports	2,897	2,699	2,955	2,728	2,540	2,676	2,288	2,791	2,764	2,797	3,053	2,549	2,728
Product imports	137	174	148	142	176	128	138	169	139	171	126	117	147
Total imports	3,034	2,873	3,103	2,870	2,716	2,804	2,426	2,960	2,903	2,968	3,179	2,666	2,875
Exports	255	260	232	226	317	290	246	307	307	261	253	279	269
Net imports	2,779	2,613	2,871	2,644	2,399	2,514	2,180	2,653	2,596	2,707	2,926	2,387	2,606
1974													
Crude imports	2,686	2,942	2,508	2,990	2,476	2,555	2,580	2,529	2,274	2,725	2,322	2,686	2,604
Product imports	80	121	80	121	144	98	180	152	188	157	134	200	138
Total imports	2,766	3,063	2,588	3,111	2,620	2,653	2,760	2,681	2,462	2,882	2,456	2,886	2,742
Exports	269	230	258	277	257	225	210	211	186	166	220	211	224
Net imports	2,497	2,833	2,330	2,834	2,363	2,428	2,550	2,470	2,276	2,716	2,236	2,675	2,518
1975													
Crude imports	2,234	2,056	2,095	2,047	1,952	1,989	2,130	2,201	2,136	2,199	2,203	2,462	2,120
Product imports	213	266	203	165	127	162	180	100	118	113	131	131	158
Total imports	2,447	2,322	2,298	2,212	2,079	2,151	2,310	2,301	2,254	2,312	2,334	2,593	2,278
Exports	209	221	175	217	190	230	182	302	264	214	267	259	227
Net imports	2,238	2,101	2,123	1,995	1,889	1,921	2,128	1,999	1,990	2,098	2,067	2,334	2,051
1976													
Crude imports	2,175	2,447	2,600	2,500	2,188	2,039	2,456	2,370	2,517	2,180	2,767	2,704	2,417
Product imports	134	143	158	158	128	233	266	218	199	223	170	151	181
Total imports	2,309	2,590	2,758	2,658	2,316	2,272	2,722	2,588	2,716	2,403	2,937	2,855	2,598
Exports	276	325	395	316	272	324	244	288	274	207	268	288	249
Net imports	2,033	2,265	2,363	2,342	2,044	1,948	2,478	2,300	2,442	2,196	2,669	2,567	2,349
1977													
Crude imports	2,711	2,508	2,198	2,537	1,944	2,079	2,289	2,360	1,810				
Product imports	123	117	169	166	145	183	171	216	147				
Total imports	2,834	2,625	2,367	2,703	2,089	2,262	2,460	2,576	1,957				
Exports	277	266	286	356	366	276	278	351	279				
Net imports	2,557	2,359	2,081	2,347	1,723	1,986	2,182	2,225	1,678				
Italy													
1973													
Crude imports	2,308	2,448	2,600	2,598	2,498	2,996	2,779	2,784	2,606	2,548	1,844	N.A.	2,567
Product imports	76	133	97	98	154	98	109	137	232	29	65	N.A.	102
Total imports	2,384	2,581	2,697	2,696	2,652	3,094	2,888	2,921	2,838	2,577	1,909	N.A.	2,669
Exports	604	628	513	595	678	671	775	725	586	630	515	N.A.	579
Net imports	1,780	1,953	2,184	2,101	1,974	2,423	2,113	2,196	2,252	1,947	1,394	N.A.	2,090
1974													
Crude imports	1,576	2,850	2,270	2,527	2,961	2,435	2,575	2,800	2,254	2,270	2,285	2,237	2,397
Product imports	71	60	92	145	126	108	219	190	241	225	378	283	119
Total imports	1,647	2,910	2,362	2,672	3,087	2,543	2,794	2,990	2,495	2,495	2,663	2,520	2,516
Exports	198	645	413	583	444	397	546	433	407	293	375	363	423
Net imports	1,449	2,265	1,949	2,089	2,643	2,146	2,248	2,557	2,088	2,202	2,288	2,157	2,093
1975													
Crude imports	1,858	1,688	1,724	1,841	1,659	1,949	1,706	1,918	2,236	2,117	1,752	1,990	1,941
Product imports	172	229	246	246	319	181	219	142	138	202	191	229	180
Total imports	2,030	1,917	1,970	2,087	1,978	2,130	1,925	2,060	2,374	2,319	1,943	2,219	2,121
Exports	240	264	212	240	246	308	285	413	394	324	252	236	291
Net imports	1,790	1,653	1,758	1,847	1,732	1,822	1,640	1,647	1,980	1,995	1,691	1,983	1,830

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Selected Developed Countries: Trends in Oil Trade
(Continued)

Thousand b/d

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual Average
Italy (Continued)													
1976													
Crude imports	2,024	2,024	2,024	2,014	2,014	2,014	2,115	2,115	2,115	2,131	2,131	2,131	2,071
Product imports	160	160	160	216	216	216	219	219	219	194	194	194	197
Total imports	2,184	2,184	2,184	2,230	2,230	2,230	2,334	2,334	2,334	2,325	2,325	2,325	2,268
Exports	271	271	271	337	337	337	322	322	322	289	289	289	305
Net imports	1,913	1,913	1,913	1,893	1,893	1,893	2,012	2,012	2,012	2,036	2,036	2,036	1,963
1977 [2]													
Crude imports	2,198	2,198	2,198	2,370	1,931	2,145	1,966	2,025	1,971				
Product imports	232	232	232	198	141	196	145	134	161				
Total imports	2,430	2,430	2,430	2,568	2,072	2,341	2,111	2,159	2,132				
Exports	368	368	368	341	365	434	290	358	292				
Net imports	2,062	2,062	2,062	2,227	1,707	1,907	1,821	1,801	1,840				
United Kingdom													
1973													
Crude imports	2,276	2,090	2,273	2,248	2,402	2,535	2,175	2,818	1,917	2,892	2,415	2,004	2,329
Product imports	615	533	457	359	488	439	323	417	361	416	326	208	409
Total imports	2,891	2,623	2,730	2,607	2,890	2,974	2,498	3,235	2,278	3,308	2,741	2,212	2,738
Exports	464	311	323	329	332	257	430	555	496	464	488	293	396
Net imports	2,427	2,312	2,407	2,278	2,558	2,717	2,068	2,680	1,782	2,844	2,253	1,919	2,342
1974													
Crude imports	2,593	2,439	2,486	2,437	2,486	2,442	2,182	1,994	2,144	2,534	2,259	1,941	2,271
Product imports	440	372	353	306	364	291	326	252	246	324	372	385	314
Total imports	3,033	2,811	2,839	2,743	2,850	2,733	2,508	2,246	2,390	2,858	2,631	2,326	2,585
Exports	491	256	204	238	344	373	331	364	353	385	268	314	321
Net imports	2,542	2,555	2,635	2,505	2,506	2,360	2,177	1,882	2,037	2,473	2,363	2,012	2,264
1975													
Crude imports	2,216	2,030	1,491	1,849	1,802	1,926	1,748	1,776	1,687	2,032	1,429	1,599	1,775
Product imports	442	329	267	290	231	257	262	247	240	303	348	344	292
Total imports	2,658	2,359	1,758	2,139	2,033	2,183	2,010	2,023	1,927	2,335	1,777	1,943	2,067
Exports	310	343	224	226	262	303	317	308	357	423	299	261	300
Net imports	2,348	2,016	1,534	1,913	1,771	1,880	1,693	1,715	1,570	1,912	1,478	1,683	1,767
1976													
Crude imports	1,888	1,986	1,762	1,938	1,698	1,814	1,688	1,615	1,779	1,474	2,112	1,724	1,770
Product imports	302	314	421	301	318	267	297	220	221	200	251	283	282
Total imports	2,190	2,300	2,183	2,239	2,016	2,081	1,985	1,835	2,000	1,674	2,363	2,007	2,052
Exports	333	264	384	332	349	328	407	399	488	464	522	447	392
Net imports	1,857	2,036	1,799	1,907	1,667	1,753	1,578	1,436	1,512	1,210	1,841	1,560	1,660
1977													
Crude imports	1,756	1,511	1,672	1,347	1,701	1,449	1,147	1,263					
Product imports	253	238	261	272	312	286	261	313					
Total imports	2,109	1,749	1,933	1,619	2,013	1,735	1,408	1,576					
Exports	546	575	589	538	539	732	597	747					
Net imports	1,563	1,174	1,344	1,081	1,474	1,003	811	829					
West Germany													
1973													
Crude imports	2,177	2,217	2,226	2,201	2,173	2,306	2,091	2,140	2,297	2,359	2,274	2,067	2,210
Product imports	776	788	690	831	870	748	789	710	828	904	859	709	836
Total imports	2,953	3,005	2,916	3,032	3,043	3,054	2,889	2,850	3,125	3,263	3,133	2,776	3,046
Exports	153	177	164	135	184	174	177	185	155	239	235	141	177
Net imports	2,800	2,828	2,752	2,897	2,859	2,880	2,712	2,665	2,970	3,024	2,898	2,635	2,869
1974													
Crude imports	2,050	1,891	1,973	1,962	1,990	2,245	2,080	2,147	2,055	2,048	2,244	1,918	2,050
Product imports	613	774	767	646	795	740	882	891	806	756	669	689	746
Total imports	2,663	2,665	2,649	2,608	2,785	2,985	2,962	3,038	2,861	2,804	2,913	2,607	2,796
Exports	180	178	238	147	236	141	170	214	193	165	184	186	199
Net imports	2,483	2,487	2,411	2,461	2,549	2,844	2,792	2,824	2,668	2,639	2,729	2,421	2,597
1975													
Crude imports	1,684	1,614	1,453	1,798	1,754	1,911	1,676	1,839	1,810	2,051	2,075	1,935	1,807
Product imports	583	766	606	824	575	920	794	767	873	789	667	718	709
Total imports	2,267	2,380	2,059	2,622	2,329	2,831	2,470	2,606	2,683	2,840	2,742	2,653	2,509
Exports	158	120	113	132	100	121	137	120	133	125	161	126	129
Net imports	2,109	2,260	1,946	2,490	2,229	2,710	2,333	2,486	2,550	2,715	2,581	2,527	2,380
1976													
Crude imports	1,669	1,836	1,717	1,823	1,830	1,847	2,050	2,168	2,220	2,068	2,233	2,273	1,979
Product imports	761	978	792	808	833	871	850	991	811	645	690	899	830
Total imports	2,430	2,814	2,509	2,631	2,663	2,718	2,900	3,159	3,031	2,713	2,923	3,172	2,809
Exports	113	115	148	115	131	101	176	128	168	116	132	160	134
Net imports	2,317	2,699	2,361	2,516	2,532	2,617	2,724	3,031	2,863	2,597	2,791	3,012	2,675
1977													
Crude imports	2,140	2,020	1,894	1,774	1,871	1,920	2,042	2,097					
Product imports	705	615	680	813	751	921	969	835					
Total imports	2,845	2,635	2,574	2,587	2,622	2,841	3,011	2,932					
Exports	78	155	128	113	152	147	117	129					
Net imports	2,767	2,480	2,446	2,474	2,470	2,694	2,894	2,803					

[1] Bureau of the Mines data through Apr 1977.
[2] Estimated.

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Developed Countries: Exports to OPEC[1]

Million US $ (f.o.b.)

	Algeria	Ecuador	Gabon	Indonesia	Iran	Iraq	Kuwait	Libya	Nigeria	Qatar	Saudi Arabia	UAE	Venezuela	Total
United States														
1974	**315.1**	**325.8**	**32.5**	**530.5**	**1,733.6**	**284.7**	**208.5**	**139.4**	**286.4**	**33.6**	**835.1**	**229.7**	**1,767.7**	**6,722.6**
1975	**631.8**	**409.8**	**58.7**	**810.1**	**3,243.7**	**309.7**	**366.1**	**231.5**	**536.3**	**50.3**	**1,501.8**	**372.2**	**2,243.3**	**10,765.3**
1976	**487.0**	**415.8**	**45.9**	**1,036.0**	**2,776.0**	**381.8**	**471.5**	**276.6**	**769.9**	**78.7**	**2,774.1**	**424.8**	**2,627.8**	**12,565.9**
1st Qtr	75.7	91.3	9.1	271.1	748.3	78.6	111.9	33.1	127.4	16.5	484.9	111.2	591.7	2,750.8
2d Qtr	165.5	99.8	9.0	286.7	617.1	95.4	110.3	52.5	161.6	19.6	743.3	112.0	640.1	3,112.9
3d Qtr	113.0	105.1	8.0	244.5	624.5	159.0	114.6	118.1	197.8	8.5	714.2	81.0	617.4	3,105.7
4th Qtr	132.8	119.6	19.8	233.7	786.1	48.8	134.7	72.9	283.1	34.1	831.7	120.6	778.6	3,596.5
1977														
1st Qtr	116.0	98.0	9.3	187.8	592.7	53.7	152.3	68.5	203.6	24.6	739.5	147.0	669.2	3,062.2
2d Qtr	145.7	133.4	9.5	197.1	609.8	49.5	157.1	89.0	239.6	19.0	838.1	134.3	766.8	3,388.9
Japan														
1974	**154.5**	**113.8**	**7.4**	**1,453.3**	**1,014.9**	**474.4**	**279.5**	**234.4**	**285.1**	**46.7**	**677.5**	**309.2**	**399.0**	**5,449.7**
1975	**260.9**	**177.8**	**14.2**	**1,849.9**	**1,855.3**	**818.8**	**367.1**	**240.2**	**586.0**	**122.3**	**1,350.4**	**420.2**	**360.2**	**8,423.3**
1976	**204.4**	**133.6**	**16.7**	**1,642.4**	**1,709.4**	**626.2**	**720.4**	**327.2**	**575.0**	**229.0**	**1,892.7**	**636.8**	**563.6**	**9,277.4**
1st Qtr	44.3	21.6	1.8	361.6	400.0	128.0	126.2	68.1	112.6	56.5	330.8	130.8	89.4	1,871.7
2d Qtr	56.6	32.8	2.7	381.1	400.0	191.4	172.9	75.0	124.8	42.2	529.6	143.4	118.6	2,271.1
3d Qtr	33.5	34.8	7.3	435.8	437.4	156.4	199.1	93.7	133.2	60.6	569.8	165.1	149.1	2,475.8
4th Qtr	70.0	44.4	4.9	463.9	472.0	150.4	222.2	90.4	204.4	69.7	462.5	197.5	206.5	2,658.8
1977														
1st Qtr	52.0	38.2	5.9	390.6	427.2	131.3	237.5	67.9	211.1	73.2	425.8	224.5	173.8	2,459.0
Apr	48.4	20.8	1.3	124.4	141.8	92.9	84.6	16.6	69.1	34.8	174.1	77.8	79.9	966.5
West Germany														
1974	**482.9**	**82.3**	**28.3**	**324.3**	**1,139.1**	**373.4**	**159.9**	**402.4**	**346.0**	**20.9**	**286.0**	**90.2**	**330.6**	**4,066.3**
1975	**610.1**	**76.5**	**23.9**	**392.7**	**2,105.1**	**1,047.7**	**203.2**	**535.9**	**653.4**	**47.0**	**564.6**	**145.1**	**371.2**	**6,776.4**
1976	**740.2**	**93.2**	**27.1**	**478.4**	**2,294.3**	**884.4**	**304.8**	**523.3**	**867.2**	**67.7**	**1,191.1**	**233.3**	**540.5**	**8,245.5**
1st Qtr	178.1	17.5	5.2	97.6	484.5	216.6	56.0	121.4	185.5	15.0	182.8	45.9	104.2	1,710.3
2d Qtr	152.5	17.9	6.8	104.2	539.7	182.9	63.7	102.0	176.6	22.3	302.3	50.0	117.3	1,838.2
3d Qtr	198.0	34.1	7.5	123.7	590.1	269.2	83.0	153.6	214.2	11.3	324.1	58.3	167.7	2,234.8
4th Qtr	211.6	23.7	7.6	152.9	680.0	215.7	102.1	146.3	290.9	19.1	381.9	79.1	151.3	2,462.2
1977														
1st Qtr	312.8	35.2	8.4	98.4	608.4	205.1	79.6	136.6	260.4	24.5	298.1	81.3	158.4	2,307.2
Apr	69.8	7.4	2.7	28.9	221.1	81.7	28.2	49.0	104.6	6.0	107.4	34.9	57.6	799.3
France														
1974	**1,297.5**	**18.4**	**185.0**	**103.9**	**257.5**	**214.4**	**63.9**	**362.7**	**175.0**	**9.4**	**120.0**	**68.6**	**140.9**	**3,017.2**
1975	**1,904.2**	**18.2**	**335.8**	**120.6**	**631.6**	**409.0**	**97.5**	**405.5**	**462.9**	**15.0**	**198.6**	**134.1**	**175.8**	**4,908.8**
1976	**1,475.2**	**17.7**	**389.8**	**219.3**	**652.7**	**473.5**	**225.9**	**348.7**	**531.8**	**31.7**	**339.3**	**190.8**	**170.4**	**5,066.8**
1st Qtr	392.7	4.3	84.4	63.2	176.3	134.8	34.7	94.2	102.7	7.3	65.3	44.1	36.3	1,240.3
2d Qtr	330.2	4.8	90.6	56.3	162.8	110.4	53.8	99.2	133.7	7.2	92.0	41.1	39.0	1,221.1
3d Qtr	383.1	5.2	114.2	49.5	173.8	111.3	48.1	73.0	136.6	6.6	78.7	50.2	49.4	1,279.7
4th Qtr	369.2	3.4	100.6	50.3	139.8	117.0	89.3	82.3	158.8	10.6	103.3	55.4	45.7	1,325.7
1977														
1st Qtr	363.7	5.5	121.0	56.2	154.3	127.7	36.4	98.6	184.8	20.7	114.3	52.2	56.2	1,391.6
Apr	104.3	1.5	45.6	19.7	57.0	32.2	18.0	33.3	55.0	4.1	59.4	13.6	16.0	459.7
United Kingdom														
1974	**128.1**	**31.8**	**8.4**	**109.2**	**653.2**	**139.9**	**139.9**	**146.5**	**520.3**	**51.6**	**280.4**	**227.0**	**117.8**	**2,554.1**
1975	**173.7**	**38.4**	**6.3**	**133.4**	**1,097.7**	**302.2**	**217.5**	**236.8**	**1,125.9**	**121.6**	**440.0**	**440.8**	**200.3**	**4,534.6**
1976	**183.7**	**41.2**	**7.3**	**144.4**	**921.1**	**273.5**	**257.1**	**241.8**	**1,389.0**	**155.9**	**710.6**	**579.0**	**229.9**	**5,134.5**
1st Qtr	50.0	7.0	2.1	33.4	235.3	95.5	52.0	57.1	339.8	38.3	131.7	141.1	55.1	1,238.4
2d Qtr	47.0	9.1	1.9	38.7	250.9	60.8	59.8	61.0	338.4	44.3	161.0	137.4	48.9	1,259.2
3d Qtr	43.9	11.4	1.5	32.2	226.2	63.4	69.8	64.7	340.5	34.0	193.8	130.3	50.8	1,262.5
4th Qtr	42.8	13.7	1.8	40.1	208.7	53.8	75.5	59.0	370.3	39.3	224.1	170.2	75.1	1,374.4
1977														
1st Qtr	43.8	22.3	2.0	42.7	274.3	66.4	79.1	61.9	407.2	42.6	209.7	209.1	59.8	1,520.9
2d Qtr	34.3	26.1	3.4	30.2	282.6	70.0	113.6	77.5	482.9	57.0	250.9	194.7	64.2	1,687.4

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Developed Countries: Exports to OPEC[1]
(Continued)

Million US $ (f.o.b.)

	Algeria	Ecuador	Gabon	Indonesia	Iran	Iraq	Kuwait	Libya	Nigeria	Qatar	Saudi Arabia	UAE	Venezuela	Total
Italy														
1974	**325.7**	**25.5**	**6.6**	**58.0**	**282.4**	**96.0**	**65.7**	**853.8**	**131.0**	**11.0**	**133.2**	**37.3**	**211.6**	**2,237.8**
1975	**559.7**	**30.2**	**13.9**	**85.5**	**566.3**	**259.5**	**116.5**	**1,032.2**	**298.5**	**22.6**	**323.3**	**87.6**	**321.9**	**3,717.7**
1976	**408.5**	**22.6**	**14.9**	**53.1**	**730.6**	**203.2**	**175.2**	**955.5**	**317.4**	**25.7**	**636.1**	**133.2**	**350.4**	**4,026.4**
1st Qtr	104.5	4.3	2.4	12.3	140.4	42.7	26.3	186.0	46.2	6.7	96.3	23.8	63.9	755.8
2d Qtr	77.9	4.8	3.2	18.4	193.5	67.6	39.1	232.8	74.2	5.2	127.5	28.8	77.7	950.7
3d Qtr	97.1	6.2	4.0	11.8	198.6	48.4	46.9	265.6	92.4	7.5	155.0	31.0	92.1	1,056.6
4th Qtr	129.0	7.3	5.3	10.6	198.1	44.5	62.9	271.1	104.6	6.3	257.3	49.6	116.7	1,263.3
1977														
1st Qtr	126.8	5.9	7.3	11.5	193.6	53.6	53.9	269.7	122.4	9.0	211.4	45.6	124.8	1,235.5
Apr & May	99.4	6.9	6.7	6.8	153.6	33.0	43.8	229.4	102.3	7.5	160.9	33.5	97.1	980.9
Canada														
1974	**161.2**	**13.4**	**0**	**54.9**	**61.1**	**19.6**	**4.9**	**5.9**	**25.8**	**3.6**	**18.0**	**3.9**	**253.3**	**625.6**
1975	**99.3**	**21.4**	**0.5**	**63.7**	**144.7**	**66.5**	**15.7**	**22.4**	**37.6**	**1.5**	**34.3**	**4.5**	**314.5**	**826.6**
1976	**94.6**	**24.5**	**2.5**	**77.1**	**145.9**	**36.2**	**22.6**	**9.6**	**32.6**	**4.3**	**107.8**	**11.4**	**360.4**	**929.5**
1st Qtr	7.1	1.9	0.1	7.9	32.4	21.7	3.9	3.3	9.0	1.2	30.6	2.5	45.6	167.2
2d Qtr	20.6	13.5	1.3	15.4	35.2	8.2	2.6	3.7	6.6	0.2	12.8	3.1	60.6	183.8
3d Qtr	32.4	4.5	0.4	20.9	42.7	5.1	4.7	1.4	6.8	1.4	13.7	2.5	133.5	270.0
4th Qtr	34.5	4.6	0.7	32.9	35.6	1.2	11.4	1.2	10.2	1.5	50.7	3.3	120.7	308.5
1977														
1st Qtr	29.6	3.3	0.6	24.7	35.1	22.1	13.2	2.0	9.8	1.1	28.6	3.4	73.6	247.1
2d Qtr	31.0	5.3	0.3	10.4	31.2	11.8	8.3	5.5	6.5	0.6	22.7	5.1	139.4	278.1

[1] Data are unadjusted.

Developed Countries: Imports From OPEC[1]

Million US $ (c.i.f.)

	Algeria	Ecuador	Gabon	Indonesia	Iran	Iraq	Kuwait	Libya	Nigeria	Qatar	Saudi Arabia	UAE	Venezuela	Total
United States[2]														
1974	**1,090.5**	**473.0**	**162.3**	**1,688.1**	**2,132.2**	**0.9**	**13.4**	**1.4**	**3,286.2**	**79.6**	**1,671.2**	**366.3**	**4,671.1**	**15,636.2**
1975	**1,358.6**	**460.8**	**196.9**	**2,220.6**	**1,399.8**	**19.1**	**111.4**	**1,045.7**	**3,281.5**	**56.5**	**2,624.6**	**683.8**	**3,623.9**	**17,083.2**
1976	**2,209.4**	**539.0**	**189.8**	**3,004.3**	**1,480.1**	**110.0**	**37.6**	**2,243.4**	**4,937.6**	**119.0**	**5,212.9**	**1,359.2**	**3,574.6**	**25,016.9**
1st Qtr	447.5	109.4	51.3	714.4	378.0	1.2	25.7	485.0	1,016.8	22.2	1,152.9	272.7	893.3	5,570.4
2d Qtr	529.9	123.5	65.0	692.5	345.3	0.3	4.3	478.7	1,141.5	8.2	1,166.2	288.2	738.1	5,581.7
3d Qtr	674.8	136.2	20.3	851.1	397.1	35.1	4.9	603.9	1,365.3	57.4	1,506.3	363.9	935.5	6,951.8
4th Qtr	557.2	169.9	53.2	746.3	359.7	73.4	2.7	675.8	1,414.0	31.2	1,387.5	434.4	1,007.7	6,913.0
1977														
1st Qtr	695.7	155.4	58.2	914.0	657.5	45.1	66.2	820.5	1,646.7	41.1	1,603.2	405.8	1,214.6	8,324.0
2d Qtr	743.2	171.1	62.3	926.7	699.3	126.3	72.5	1,080.5	1,598.1	74.3	1,720.8	439.0	958.5	8,672.6
Japan														
1974	**34.3**	**22.3**	**6.8**	**4,569.3**	**4,767.0**	**201.6**	**2,131.9**	**364.2**	**448.9**	**22.1**	**5,238.2**	**2,116.6**	**46.4**	**19,969.6**
1975	**36.4**	**13.5**	**12.8**	**3,431.2**	**4,978.3**	**395.6**	**2,009.7**	**280.1**	**278.6**	**27.6**	**6,132.9**	**1,773.4**	**33.9**	**19,404.0**
1976	**10.3**	**22.0**	**17.9**	**4,093.3**	**4,453.8**	**579.1**	**2,015.9**	**206.7**	**108.7**	**30.4**	**7,834.0**	**2,471.6**	**33.6**	**21,877.3**
1st Qtr	8.7	6.0	5.9	962.5	974.2	119.3	535.1	16.0	73.7	9.4	1,856.7	635.5	9.8	5,212.8
2d Qtr	0.1	6.6	4.3	1,002.0	1,179.1	136.2	466.4	62.3	11.5	4.8	1,954.7	564.2	7.6	5,399.8
3d Qtr	0.7	4.1	4.8	1,021.7	952.6	119.1	505.1	69.0	18.2	11.3	2,064.4	629.5	5.9	5,406.4
4th Qtr	0.8	5.3	2.9	1,107.1	1,347.9	204.5	509.3	59.4	5.3	4.9	1,958.2	642.4	10.3	5,858.3
1977														
1st Qtr	1.7	5.0	2.5	1,252.5	1,181.0	187.4	514.8	14.3	3.8	45.1	2,328.1	699.0	10.6	6,245.8
Apr	0	1.6	0.4	390.9	249.6	62.4	181.1	2.7	4.2	23.5	678.9	177.4	3.8	1,776.5
West Germany														
1974	**1,090.8**	**66.1**	**97.7**	**188.7**	**1,240.3**	**305.3**	**355.0**	**1,633.1**	**1,101.4**	**92.9**	**2,044.1**	**752.1**	**243.9**	**9,211.4**
1975	**1,025.4**	**62.0**	**107.4**	**153.4**	**1,467.4**	**127.9**	**226.9**	**1,391.1**	**962.4**	**124.0**	**1,623.1**	**736.0**	**232.1**	**8,239.1**

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Developed Countries: Imports From OPEC[1]
(Continued)

Million US $ (c.i.f.)

	Algeria	Ecuador	Gabon	Indonesia	Iran	Iraq	Kuwait	Libya	Nigeria	Qatar	Saudi Arabia	UAE	Venezuela	Total
West Germany (Continued)														
1976	**1,145.7**	**67.3**	**69.3**	**213.6**	**1,987.5**	**154.7**	**182.1**	**2,103.3**	**975.1**	**124.6**	**1,798.1**	**691.1**	**207.9**	**9,720.3**
1st Qtr	264.0	13.4	21.2	48.2	426.0	27.3	51.3	473.6	251.6	26.3	388.7	153.6	44.3	2,189.5
2d Qtr	292.8	14.4	21.2	35.4	410.3	33.2	55.3	474.9	232.8	41.3	367.3	167.4	76.7	2,223.0
3d Qtr	305.7	12.1	13.0	62.1	526.8	57.0	38.1	544.0	238.7	0.1	554.8	177.9	45.1	2,575.4
4th Qtr	283.2	27.4	13.9	67.9	624.4	37.2	37.4	610.8	252.0	56.9	487.3	192.2	41.8	2,732.4
1977														
1st Qtr	328.6	20.8	16.0	96.8	496.1	38.8	44.6	623.8	232.3	16.6	436.7	197.0	30.0	2,578.1
Apr	66.0	7.3	4.0	24.0	160.2	0.5	20.0	152.5	84.2	22.3	131.7	72.4	10.5	755.6
France														
1974	**957.7**	**9.7**	**320.8**	**61.5**	**716.3**	**1,242.3**	**938.5**	**386.8**	**872.8**	**264.0**	**3,028.3**	**1,184.6**	**133.5**	**10,116.8**
1975	**747.2**	**15.7**	**246.8**	**55.2**	**1,286.1**	**1,128.5**	**652.0**	**200.6**	**859.4**	**211.9**	**3,041.6**	**1,134.4**	**86.1**	**9,665.5**
1976	**691.4**	**13.2**	**293.8**	**97.2**	**1,436.1**	**1,590.6**	**409.1**	**320.3**	**749.4**	**326.1**	**4,079.1**	**1,235.3**	**94.0**	**11,335.6**
1st Qtr	179.8	3.7	64.2	14.4	358.9	281.5	63.1	78.7	207.3	98.4	982.4	452.7	32.6	2,817.7
2d Qtr	170.7	2.8	74.1	21.5	315.8	331.6	120.4	89.4	173.0	74.2	977.1	238.5	20.7	2,609.8
3d Qtr	155.3	1.9	79.1	27.1	331.4	400.0	111.7	65.4	152.6	80.0	1,033.5	264.4	20.3	2,722.7
4th Qtr	185.6	4.8	76.4	34.2	430.0	577.5	113.9	86.8	216.5	73.5	1,086.1	279.7	20.4	3,185.4
1977														
1st Qtr	196.5	5.5	88.1	30.7	448.6	470.7	125.5	65.4	209.4	99.5	1,033.5	263.5	19.5	3,056.4
Apr	54.5	3.5	32.8	13.6	134.1	135.4	23.8	16.3	84.9	16.4	304.5	53.3	6.0	879.1
United Kingdom														
1974	**83.8**	**5.1**	**66.1**	**33.8**	**1,202.9**	**248.6**	**1,334.0**	**913.6**	**860.6**	**388.5**	**2,757.8**	**483.9**	**315.9**	**8,694.6**
1975	**189.8**	**4.6**	**8.1**	**33.2**	**1,554.3**	**226.1**	**935.5**	**288.5**	**685.0**	**348.5**	**1,915.3**	**356.6**	**366.8**	**6,912.3**
1976	**147.3**	**4.6**	**16.3**	**39.9**	**1,879.0**	**492.6**	**1,042.7**	**297.4**	**574.9**	**456.1**	**1,763.9**	**362.6**	**215.4**	**7,292.7**
1st Qtr	54.6	0.9	1.2	7.8	425.9	70.1	223.3	70.1	160.9	149.0	492.1	98.2	70.1	1,824.2
2d Qtr	30.2	1.2	9.6	8.9	478.6	69.5	230.0	42.0	167.9	145.3	386.5	103.0	64.9	1,737.6
3d Qtr	41.4	1.3	3.0	13.4	473.3	196.7	225.7	98.2	138.4	103.3	444.9	103.2	50.8	1,893.6
4th Qtr	21.1	1.2	2.5	9.8	501.2	156.3	363.7	87.1	107.7	58.5	440.4	58.2	29.6	1,837.3
1977														
1st Qtr	26.8	0.9	2.3	9.2	482.0	138.5	224.3	29.8	159.3	99.4	498.6	92.0	19.9	1,783.0
2d Qtr	20.7	2.2	1.1	11.0	359.3	146.0	282.7	81.0	68.9	32.7	558.7	102.1	35.3	1,701.7
Italy														
1974	**268.2**	**25.1**	**56.0**	**72.4**	**1,123.3**	**1,166.4**	**478.6**	**2,364.8**	**360.6**	**208.1**	**3,047.0**	**108.3**	**105.3**	**9,384.1**
1975	**405.3**	**34.0**	**41.7**	**53.4**	**1,134.5**	**1,672.3**	**357.9**	**1,248.4**	**67.6**	**127.1**	**2,351.2**	**201.1**	**159.7**	**7,854.2**
1976	**296.8**	**25.4**	**16.4**	**114.7**	**1,218.9**	**1,304.2**	**203.2**	**1,587.0**	**55.8**	**140.1**	**2,423.8**	**236.8**	**208.1**	**7,831.2**
1st Qtr	81.3	4.8	1.9	21.4	290.5	313.3	17.9	351.8	10.7	33.5	471.3	62.9	27.8	1,689.1
2d Qtr	73.1	6.1	5.0	24.9	309.1	284.5	26.5	481.4	12.7	39.9	729.8	49.6	49.1	2,091.7
3d Qtr	76.5	7.8	5.5	30.1	303.4	356.9	71.9	403.1	17.8	18.9	632.6	41.5	68.9	2,034.9
4th Qtr	65.9	6.7	4.0	38.3	315.9	349.5	86.9	350.7	14.6	47.8	590.1	82.8	62.3	2,015.5
1977														
1st Qtr	40.5	7.7	13.2	33.3	340.9	370.9	168.2	355.1	30.5	26.5	644.8	96.5	37.5	2,165.6
Apr & May	32.7	7.9	5.3	26.7	249.6	297.0	96.2	273.8	17.3	20.0	517.7	41.0	20.2	1,605.4
Canada														
1974	**6.9**	**40.0**	**4.9**	**4.7**	**633.6**	**37.2**	**66.0**	**31.3**	**55.1**	**0**	**325.4**	**88.0**	**1,320.0**	**2,613.1**
1975	**1.7**	**20.8**	**25.4**	**14.0**	**745.3**	**131.7**	**108.7**	**35.5**	**77.0**	**6.3**	**733.3**	**138.2**	**1,088.0**	**3,125.9**
1976	**66.1**	**30.6**	**62.4**	**18.4**	**704.9**	**135.5**	**22.7**	**106.1**	**157.6**	**0**	**488.8**	**62.8**	**1,314.8**	**3,170.7**
1st Qtr	19.1	3.8	11.2	2.2	211.0	30.6	6.4	51.1	85.1	0	118.3	36.0	268.2	843.0
2d Qtr	19.5	7.2	8.1	4.2	211.5	28.4	6.5	35.0	48.8	0	126.6	19.7	439.3	954.8
3d Qtr	4.4	5.0	22.8	6.0	132.5	47.9	9.8	20.0	15.9	0	141.4	7.1	302.4	715.2
4th Qtr	23.1	14.6	20.3	6.0	149.9	28.6	0	0	7.8	0	102.5	0	304.9	657.7
1977														
1st Qtr	9.2	22.1	13.8	3.9	125.7	23.0	0	0	13.3	0	191.9	0	338.8	741.7
2d Qtr	11.0	15.9	0	6.4	136.5	0.1	0	0	0.1	0	167.3	0	339.5	676.8

[1] Data are unadjusted.
[2] Data are f.a.s.
[3] Data are f.o.b.

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Selected OECD Countries: Trends in Inland Oil Consumption

Thousand b/d

		1972	1973	1974	1975	1976	1977
United States [1]	**Annual Average**	**16,367**	**17,308**	**16,653**	**16,322**	**17,443**	
	Jan	16,735	18,713	17,286	18,004	18,598	20,481
	Feb	17,861	19,094	17,366	17,084	17,429	20,427
	Mar	16,870	17,216	16,104	16,315	17,299	18,056
	Apr	15,529	15,921	15,929	16,048	16,671	17,570
	May	14,801	16,626	15,726	15,155	15,977	16,960
	Jun	15,615	16,481	16,117	15,610	16,836	(est.) 17,600
	Jul	14,821	16,372	16,349	15,740	16,613	(est.) 17,697
	Aug	15,936	17,499	16,550	15,806	16,642	(est.) 18,533
	Sep	15,489	16,656	16,024	15,768	16,825	(est.) 17,885
	Oct	16,455	17,202	17,050	16,377	17,052	
	Nov	17,610	18,492	17,351	15,777	18,847	
	Dec	18,738	17,538	18,013	18,185	20,506	
Canada	**Annual Average**	**1,511**	**1,597**	**1,630**	**1,595**	**1,658**	
	Jan	1,536	1,667	1,823	1,691	1,785	1,797
	Feb	1,793	1,747	1,863	1,872	1,754	1,919
	Mar	1,612	1,584	1,659	1,558	1,747	1,664
	Apr	1,367	1,431	1,560	1,592	1,518	1,526
	May	1,374	1,486	1,577	1,471	1,509	1,523
	Jun	1,334	1,474	1,455	1,550	1,560	1,633
	Jul	1,294	1,490	1,534	1,493	1,531	1,530
	Aug	1,394	1,557	1,463	1,449	1,585	
	Sep	1,402	1,427	1,415	1,469	1,514	
	Oct	1,577	1,680	1,680	1,555	1,560	
	Nov	1,685	1,801	1,714	1,577	1,822	
	Dec	1,782	1,828	1,831	1,880	2,008	
Japan	**Annual Average**	**N.A.**	**5,000**	**4,872**	**4,568**	**4,786**	
	Jan	N.A.	5,036	5,103	4,729	4,941	5,428
	Feb	N.A.	5,352	5,664	5,191	5,246	6,019
	Mar	N.A.	5,306	5,407	4,918	5,165	5,540
	Apr	N.A.	4,737	4,706	4,202	4,526	4,713
	May	N.A.	4,597	4,568	4,041	4,218	4,313
	Jun	N.A.	4,776	4,520	4,135	4,429	4,480
	Jul	N.A.	4,586	4,385	4,265	4,416	4,700
	Aug	N.A.	4,684	4,576	4,234	4,461	
	Sep	N.A.	4,778	4,720	4,543	4,517	
	Oct	N.A.	5,093	4,614	4,409	4,523	
	Nov	N.A.	5,559	4,925	4,747	5,160	
	Dec	N.A.	5,526	5,330	5,447	5,846	
Austria	**Annual Average**	**203**	**227**	**203**	**199**	**215**	
	Jan	189	220	236	183	207	200
	Feb	221	225	220	190	208	208
	Mar	212	224	160	172	209	182
	Apr	183	204	169	184	156	197
	May	174	210	172	156	169	166
	Jun	181	200	169	186	189	208
	Jul	179	221	214	210	219	192
	Aug	187	222	218	223	229	213
	Sep	213	227	222	232	246	
	Oct	227	253	243	226	233	
	Nov	246	276	215	201	252	
	Dec	230	234	203	229	261	
Belgium/Luxembourg	**Annual Average**	**485**	**505**	**440**	**416**	**449**	
	Jan	535	543	512	550	498	552
	Feb	591	589	528	558	547	507
	Mar	546	570	392	410	469	517
	Apr	470	565	383	465	460	483

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Selected OECD Countries: Trends in Inland Oil Consumption
(Continued)

Thousand b/d

		1972	1973	1974	1975	1976	1977
Belgium/Luxembourg (Continued)	May	454	483	419	363	357	
	Jun	464	463	376	366	383	
	Jul	346	359	339	288	308	
	Aug	367	389	352	331	361	
	Sep	479	465	478	372	425	
	Oct	484	556	534	442	424	
	Nov	563	558	427	439	532	
	Dec	530	503	542	508	628	
	Annual Average				**301**	**307**	
Denmark	Jan	N.A.	N.A.	N.A.	332	358	370
	Feb	N.A.	N.A.	N.A.	380	398	405
	Mar	N.A.	N.A.	N.A.	317	367	362
	Apr	N.A.	N.A.	N.A.	354	307	340
	May	N.A.	N.A.	N.A.	258	242	241
	Jun	N.A.	N.A.	N.A.	257	250	236
	Jul	N.A.	N.A.	N.A.	218	184	192
	Aug	N.A.	N.A.	N.A.	264	261	293
	Sep	N.A.	N.A.	N.A.	262	274	
	Oct	N.A.	N.A.	N.A.	302	280	
	Nov	N.A.	N.A.	N.A.	324	356	
	Dec	N.A.	N.A.	N.A.	353	414	
	Annual Average	**1,985**	**2,219**	**2,094**	**1,925**	**2,071**	
France	Jan	2,276	2,743	2,523	2,190	2,432	2,518
	Feb	2,450	2,687	2,389	2,243	2,492	2,386
	Mar	2,100	2,528	2,249	1,952	2,372	2,109
	Apr	1,848	2,296	1,970	2,202	2,116	2,044
	May	1,743	1,890	1,915	1,640	1,795	1,846
	Jun	1,597	1,685	2,103	1,642	1,603	1,715
	Jul	1,444	1,566	1,703	1,491	1,624	1,348
	Aug	1,441	1,495	1,506	1,300	1,668	1,390
	Sep	1,950	1,932	1,996	1,785	1,966	1,781
	Oct	2,106	2,482	2,045	1,917	1,908	1,869
	Nov	2,332	2,593	2,260	2,077	2,204	
	Dec	2,574	2,768	2,492	2,658	2,687	
	Annual Average	**1,435**	**1,525**	**1,521**	**1,468**	**1,503**	
Italy	Jan	1,720	1,781	1,755	1,792	1,775	1,683
	Feb	1,756	1,866	1,760	1,767	1,743	1,809
	Mar	1,450	1,710	1,579	1,558	1,641	1,548
	Apr	1,169	1,420	1,421	1,530	1,423	1,319
	May	1,138	1,285	1,349	1,174	1,253	1,255
	Jun	1,101	1,255	1,314	1,289	1,236	1,327
	Jul	1,175	1,303	1,368	1,234	1,355	1,233
	Aug	1,129	1,255	1,287	1,105	1,372	1,135
	Sep	1,450	1,462	1,527	1,465	1,604	1,483
	Oct	1,650	1,610	1,569	1,679	1,464	1,405
	Nov	1,702	1,551	1,580	1,448	1,393	
	Dec	1,899	1,698	1,753	1,600	1,779	
	Annual Average	**496**	**507**	**444**	**412**	**487**	
Netherlands	Jan	509	584	468	399	480	521
	Feb	591	586	522	430	542	524
	Mar	557	542	438	379	543	518
	Apr	512	541	530	474	443	424
	May	453	475	432	390	453	393
	Jun	430	436	427	403	462	456
	Jul	374	408	415	354	426	388
	Aug	435	437	414	364	446	
	Sep	440	485	440	412	493	

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Selected OECD Countries: Trends in Inland Oil Consumption (Continued)

Thousand b/d

		1972	1973	1974	1975	1976	1977
Netherlands (Continued)	Oct	515	594	472	440	469	
	Nov	581	503	440	419	517	
	Dec	567	505	433	484	576	
	Annual Average	**N.A.**	**N.A.**	**143**	**150**	**163**	
Norway	Jan	N.A.	N.A.	155	142	161	177
	Feb	N.A.	N.A.	154	171	180	202
	Mar	N.A.	N.A.	124	137	181	189
	Apr	N.A.	N.A.	126	149	145	162
	May	N.A.	N.A.	118	145	147	150
	Jun	N.A.	N.A.	141	130	153	159
	Jul	N.A.	N.A.	113	120	130	131
	Aug	N.A.	N.A.	125	140	146	156
	Sep	N.A.	N.A.	151	161	168	189
	Oct	N.A.	N.A.	161	162	167	
	Nov	N.A.	N.A.	174	181	175	
	Dec	N.A.	N.A.	180	162	197	
	Annual Average	**471**	**581**	**626**	**667**	**744**	
Spain	Jan	483	539	610	720	758	740
	Feb	508	568	639	682	785	727
	Mar	461	564	571	625	769	660
	Apr	447	537	595	688	742	634
	May	444	523	620	622	685	669
	Jun	472	530	608	610	714	672
	Jul	457	466	630	624	755	677
	Aug	462	667	617	584	685	615
	Sep	477	576	636	667	734	694
	Oct	459	669	677	713	742	
	Nov	500	646	653	706	780	
	Dec	515	681	650	735	782	
	Annual Average	**N.A.**	**533**	**490**	**478**	**529**	
Sweden	Jan	N.A.	603	521	511	565	606
	Feb	N.A.	555	415	547	530	600
	Mar	N.A.	540	427	479	539	545
	Apr	N.A.	506	441	532	450	499
	May	N.A.	524	495	392	395	466
	Jun	N.A.	420	464	511	410	409
	Jul	N.A.	387	423	362	382	377
	Aug	N.A.	455	463	459	483	450
	Sep	N.A.	492	516	503	571	
	Oct	N.A.	656	553	462	585	
	Nov	N.A.	645	568	446	697	
	Dec	N.A.	618	581	538	740	
	Annual Average	**1,954**	**1,974**	**1,857**	**1,633**	**1,601**	
United Kingdom	Jan	2,121	2,315	2,045	1,981	1,679	1,830
	Feb	2,401	2,313	2,127	1,907	1,865	1,844
	Mar	2,249	2,271	2,133	1,731	1,879	1,818
	Apr	2,027	2,038	1,899	1,826	1,716	1,670
	May	1,851	1,939	1,704	1,482	1,417	1,546
	Jun	1,745	1,697	1,545	1,416	1,416	1,454
	Jul	1,519	1,637	1,531	1,322	1,346	1,302
	Aug	1,527	1,615	1,513	1,208	1,276	1,342
	Sep	1,703	1,727	1,663	1,501	1,477	
	Oct	1,959	2,150	2,049	1,707	1,544	
	Nov	2,194	2,258	2,108	1,723	1,750	
	Dec	2,132	1,906	1,983	1,821	1,869	

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Selected OECD Countries: Trends in Inland Oil Consumption (Continued)

Thousand b/d

		1972	1973	1974	1975	1976	1977
West Germany	**Annual Average**	**2,521**	**2,693**	**2,408**	**2,319**	**2,507**	
	Jan	2,545	2,868	2,556	2,183	2,464	2,389
	Feb	2,803	2,850	1,969	2,455	2,497	2,441
	Mar	2,525	2,707	2,173	2,234	2,747	2,518
	Apr	2,347	2,809	2,539	2,431	2,339	2,425
	May	2,335	2,546	2,403	2,253	2,320	2,359
	Jun	2,632	2,674	2,414	2,106	2,393	2,495
	Jul	2,188	2,196	2,548	2,319	2,624	2,381
	Aug	2,444	2,738	2,476	2,360	2,515	2,468
	Sep	2,487	2,618	2,473	2,309	2,521	
	Oct	2,522	2,969	2,613	2,328	2,391	
	Nov	2,667	2,883	2,432	2,361	2,700	
	Dec	2,783	2,481	2,261	2,502	2,571	

[1] Including bunkers, refinery fuel, and losses.
[2] Principal products only.

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Selected OECD Countries: Oil Stocks

Thousand Barrels, End of Month

	United States	Japan	Canada	Austria	Belgium	Denmark	France	Ireland	Italy
1973 Sep	1,057,911 [1]	300,000	113,193	N.A.	N.A.	30,996	194,122	5,555	N.A.
1974 Jan	1,017,333 [1]	275,000	125,289	7,650	35,018	25,017	174,594	5,490	N.A.
Mar	995,365 [1]	257,000	116,060	8,358	25,404	25,849	171,229	6,037	143,876
Jun	1,102,467 [1]	325,000	N.A.	10,454	31,375	28,025	196,406	6,190	163,922
Sep	1,156,105 [1]	359,000	148,305	9,278	37,011	34,507	238,630	6,504	177,310
Dec	1,115,916 [1]	334,000	142,233	9,402	40,274	37,223	235,848	7,424	173,609
1975 Jan	1,099,144	330,000	136,590	9,826	40,406	33,609	230,271	7,687	147,431
Mar	1,076,360	296,000	133,805	9,220	38,902	34,595	215,365	7,439	150,124
Jun	1,071,150	314,000	140,617	10,257	36,704	34,566	203,831	7,665	169,776
Sep	1,147,338	330,000	147,939	8,913	41,420	44,238	223,942	7,599	174,010
Dec	1,132,955	325,000	138,462	7,329	40,194	40,325	195,998	7,081	N.A.
1976 Jan [2]	1,102,282	308,000	128,356	6,877	38,508	39,223	182,887	6,825	N.A.
Mar	1,060,489	290,000	121,490	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Jun	1,108,703	325,000	132,174	6,855	41,676	31,193	167,017	7,315	N.A.
Sep	1,206,690	365,000	138,211	8,110	41,537	40,661	209,692	7,877	N.A.
Dec	1,129,445	359,000	125,934	7,680	43,092	37,478	203,407	7,628	157,687
1977 Jan	1,064,915	364,000	126,025	7,059	43,683	36,383	192,676	7,242	155,811
Feb	1,050,507	315,000	120,857	8,358	42,880	35,544	188,347	7,271	154,322
Mar	1,086,822	327,000	125,757	9,074	42,880	35,361	183,303	7,110	151,110
Apr	1,121,008	332,000	122,770	9,454	43,187	32,551	187,048	7,154	166,973
May	1,171,222	358,000	129,467	9,373	44,085	34,128	174,010	8,497	170,893
Jun	1,209,500	362,000	138,808	8,541	43,618	36,215	184,354	9,388	N.A.
Jul	1,239,100	356,000	139,053	9,044	45,552	38,654	197,480	9,943	164,900
Aug	1,251,800	361,000	N.A.	8,753	47,538	41,391	209,123	9,957	173,317
Sep	1,284,900	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

	Luxembourg	Netherlands	Norway	Portugal	Spain	Sweden	Switzerland	Turkey	United Kingdom	West Germany
1973 Sep	N.A.	N.A.	8,045	7,125	N.A.	43,398	26,514	N.A.	152,261	172,010
1974 Jan	N.A.	N.A.	8,446	5,745	40,449	37,668	25,995	N.A.	131,239	149,190
Mar	N.A.	N.A.	9,176	7,840	47,414	39,128	26,382	9,979	134,816	165,549
Jun	N.A.	N.A.	10,476	7,307	50,217	43,034	26,966	9,446	167,637	170,827
Sep	N.A.	N.A.	10,541	7,264	53,538	47,815	28,309	12,527	175,236	187,968
Dec	N.A.	66,452	7,037	7,037	53,261	44,749	29.638	9,345	160,593	187,938
1975 Jan	1,708	65,269	8,650	6,344	40,449	43,727	29,025	8,234	169,623	171,192
Mar	1,745	61,430	9,672	6,110	50,611	39,785	26,928	8,088	145,248	158,169
Jun	2,102	62,941	9,789	5,928	48,633	34,675	27,652	10,220	147,949	161,520
Sep	2,139	63,758	10,986	6,446	51,677	40,114	29,623	11,213	154,921	184,267
Dec	2,044	60,086	11,614	8,541	50,201	43,180	29,762	N.A.	138,941	186,668
1976 Jan	2,015	53,195	12,410	5,533	48,728	42,742	29,200	N.A.	N.A.	184,829
Mar	1,832	52,932	9,570	7,234	N.A.	37,668	27,528	N.A.	N.A.	175,483
Jun	1,971	54,560	11,154	6,658	N.A.	37,194	28,587	N.A.	135,291	189,092
Sep	1,986	61,656	12,038	6,066	50,582	37,194	29,799	N.A.	140,686	201,845
Dec	2,008	56,568	12,468	8,176	N.A.	48,326	31,178	9,541	136,065	218,540
1977 Jan	2,008	53,618	12,673	9,855	61,320	45,954	32,047	8,636	133,320	217,474
Mar	1,978	53,078	9,833	7,205	66,576	40,478	31,032	7,169	124,217	211,423
Jun	2,022	58,765	12,695	7,753	67,240	46,070	33,514	10,731	129,020	219,781
Jul	2,044	62,481	12,790	7,358	67,897	46,143	34,274	N.A.	132,422	224,380
Aug	2,022	N.A.	13,921	6,760	64,006	46,143	34,821	N.A.	133,524	230,870

[1] Estimated.

[2] As of January 1977, US Bureau of Mines changed the reporting of crude oil stocks to include foreign crude oil not yet received at refineries. Figures for 1976 and 1977 have been computed on the new basis.

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Estimated OECD Oil Consumption [1]

Million b/d

	1st Qtr	2d Qtr	3d Qtr	4th Qtr
1973	43.2	37.6	36.8	42.4
1974	39.6	35.9	36.3	39.0
1975	37.9	34.2	34.2	37.6
1976	39.9	35.7	36.2	41.1
1977	42.5	37.1		

[1] Excluding Australia and New Zealand, and including US refinery gain.

Western Europe: Oil Spot Market Prices

US $ per Barrel

	F.O.B. Rotterdam [1]				F.O.B. Italy [2]			
	Heavy Fuel Oil				Heavy Fuel Oil			
	1% Sulfur	3.5% Sulfur	Gas Oil	Gasoline (Premium)	1% Sulfur	3.5% Sulfur	Gas Oil	Gasoline (Premium)
1974								
1st Qtr	14.02	12.77	15.13	19.76	13.87	12.88	13.95	19.26
2d Qtr	10.15	9.70	11.77	19.61	9.90	9.35	10.93	18.77
3d Qtr	9.87	9.24	12.34	13.92	9.61	9.23	11.96	13.15
4th Qtr	11.09	10.11	12.33	13.26	10.29	9.96	11.68	12.08
1975								
1st Qtr	11.97	10.49	11.18	14.20	10.57	10.24	11.10	13.23
2d Qtr	10.61	9.68	12.90	15.95	10.40	10.16	12.24	15.28
3d Qtr	9.33	8.62	14.40	15.02	8.81	8.30	13.87	14.64
4th Qtr	9.53	8.33	14.84	15.85	8.99	8.38	14.56	15.24
1976								
1st Qtr	10.39	9.84	13.79	17.10	9.95	9.65	13.59	16.48
2d Qtr	10.40	9.56	14.08	19.24	10.18	9.73	13.90	18.30
3d Qtr	11.06	9.99	14.40	18.02	10.34	10.06	14.19	17.37
4th Qtr	12.07	10.76	14.57	17.44	11.64	10.85	14.48	16.83
1977								
1st Qtr	13.25	11.71	15.80	16.82	13.53	12.06	15.89	16.56
2d Qtr	12.51	10.77	15.74	17.26	12.25	10.88	15.71	16.48
3d Qtr	12.47	11.33	15.67	16.60	12.42	11.29	15.70	15.87
Oct	12.57	11.58	15.60	16.51	12.54	11.64	15.62	15.58
Nov	12.73	11.57	15.74	16.50	12.24	11.63	15.59	15.46

[1] Barge lot—minimum 3,500 barrels.
[2] Cargo lot—minimum 130,000 barrels.

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Selected Developed Countries: Retail Petroleum Product Prices

US Cents per Gallon

	Regular Gasoline		Premium Gasoline		Diesel Fuel	
	Price [1]	Tax	Price [1]	Tax	Price [1]	Tax
United States						
1973 Oct	40	12	44	12	23	12
1974 Jan	46	12	50	12	32	12
Jun	55	12	59	12	36	12
1975 Jan	53	12	57	12	50	12
Jun	57	12	61	12	51	12
1976 Jan	58	12	63	12	52	12
Jun	59	12	64	12	52	12
1977 Jan	60	12	65	12	54	12
Jun	63	12	69	12	57	12
Jul	63	12	69	12	57	12
Japan						
1973 Oct	88	39	105	39	48	21
1974 Jan	115	39	133	39	54	21
Jun	137	47	155	47	71	21
1975 Jan	152	47	170	47	78	21
Jun	155	47	172	47	82	21
1976 Jan	156	47	174	47	86	21
Jun	157	47	175	47	93	27
1977 Jan	167	59	185	59	93	27
Jun	167	59	185	59	88	25
West Germany						
1973 Oct	112	81	124	82	112	76
1974 Jan	137	83	149	84	139	79
Jun	137	83	149	84	139	79
1975 Jan	129	84	140	84	137	76
Jun	129	84	143	84	137	76
1976 Jan	141	84	151	85	141	79
Jun	144	84	154	85	141	79
1977 Jan	144	84	154	84	141	79
Jun	141	84	150	86	140	79
Oct	140	84	149	86	140	79
France [2]						
1973 Oct	95	65	103	69	66	39
1974 Jan	123	69	133	73	79	41
Jun	123	69	133	73	79	41
1975 Jan	129	73	139	77	88	38
Jun	129	73	139	77	85	46
1976 Jan	134	75	145	80	95	47
Jun	134	76	149	80	95	48
1977 Jan	159	97	171	103	99	48
Jun	167	101	180	108	109	54
Oct	167	101	180	108	109	54
United Kingdom						
1973 Oct	51	32	53	32	51	32
1974 Jan	55	32	57	32	55	32
Jun	76	39	79	39	78	39
1975 Jan	100	39	104	39	79	39
Jun	100	39	104	39	78	39
1976 Jan	107	54	109	53	88	39
Jun	107	54	109	54	88	39
1977 Jan	112	55	115	56	111	52
Jun	119	64	122	64	120	59
Oct	107	55	110	55	120	59
Italy [2]						
1973 Oct	75	56	79	58	41	26
1974 Jan	81	57	85	59	48	27
Jun	105	69	111	70	58	27
1975 Jan	122	83	128	87	58	27
Jun	122	83	128	87	60	28
1976 Jan	128	84	134	87	62	27
Jun	164	107	171	110	70	29
1977 Jan	205	147	213	153	72	29
Jun	205	148	213	153	66	19
Oct	205	148	213	153	66	19
Canada [3]						
1973 Oct	44	17	48	17	48	23
1974 Jan	44	17	48	17	48	23
Jun	51	17	55	17	55	23
1975 Jan	52	17	56	17	56	23
Jun	54	17	58	17	56	23
1976 Jan	66	25	70	25	61	31
Jun	66	25	70	25	62	31
1977 Jan	70	25	74	25	65	31
Mar	72	25	76	25	68	31

NOTE: Converted at 28 March 1977 exchange rates.
[1] Including tax.
[2] Government price ceilings in effect.
[3] Toronto prices.

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OPEC Countries: Crude Oil Prices

US $ per Barrel

	4th Qtr 1975		1976		1st Qtr 1977		2d Qtr 1977		July 1977	
	Operating Company Cost	Direct Sales Price	Operating Company Cost	Direct Sales Price	Operating Company Cost	Direct Sales Price	Operating Company Cost	Direct Sales Price	Operating Company Cost	Direct Sales Price
OPEC average [3]	11.41	11.75	11.48	11.77	12.45	12.74	12.46	12.76	12.70	13.02
Saudi Arabia										
Light 34° API 1.70% sulfur	11.27	11.51	11.27	11.51	11.84	12.09	11.84	12.09	12.45	12.70
Berri 39° API 1.16% sulfur	11.62	11.87	11.62	11.87	12.22	12.48	12.22	12.48	12.95	13.22
Heavy 27° API 2.85% sulfur	10.90	11.14	10.85	11.08	11.13	11.37	11.13	11.37	11.77	12.02
Medium 31° API 2.40% sulfur	11.09	11.33	11.07	11.30	11.44	11.69	11.44	11.69	12.07	12.32
Iran										
Light 34° API 1.35% sulfur	11.40	11.62	11.40	11.62	12.59	12.81	12.59	12.81	12.59	12.81
Heavy 31° API 1.60% sulfur	11.28	11.50	11.15	11.37	12.27	12.49	12.27	12.49	12.27	12.49
Iraq 35° API 1.95% sulfur	11.21	11.43	11.46	11.46	12.62	12.62	12.60	12.60	12.60	12.60
Nigeria 34° API 0.16% sulfur	12.11	12.51	12.64	12.93	13.91	14.22	14.17	14.52	14.17	14.52
UAE 39° API 0.75% sulfur	11.62	11.92	11.62	11.92	12.08	12.50	12.08	12.50	12.73	13.26
Kuwait 31° API 2.50% sulfur [4]	11.15	11.30	11.11	11.26	12.22	12.37	12.22	12.37	12.22	12.37
Libya 40° API 0.22% sulfur	12.08	12.32	12.21	12.47	13.68	13.92	13.68	13.92	13.92	14.20
Venezuela 26° API 1.52% sulfur	11.19	N.A.	11.13	11.33	12.52	12.72	12.52	12.72	12.52	12.72
Indonesia 35° API 0.09% sulfur	10.65	12.80	11.10	12.80	12.15	13.55	12.15	13.55	12.15	13.55
Algeria 42° API 0.10% sulfur	12.62	12.75	13.01	13.01	14.29	14.29	14.29	14.29	14.45	14.45
Qatar 40° API 1.17% sulfur	11.54	11.85	11.54	11.85	12.88	13.19	12.88	13.19	12.88	13.19
Gabon 29° API 1.26% sulfur	10.29	11.55	10.45	11.55	11.79	12.80	11.79	12.80	11.79	12.80
Ecuador 28° API 0.93% sulfur	10.81	11.46	10.81	11.46	N.A.	13.00	N.A.	13.00	N.A.	13.00

[1] Total average f.o.b. costs paid by present or former concessionaires.

[2] F.o.b. prices set by the government for direct sales and, in most cases, for the producing company buy-back oil.

[3] Weighted by the volume of production.

[4] A 10-cent-per-barrel discount will be offered to buyers provided they meet their minimum contractual lifting volumes for second half 1977. The discount will be credited to the lifting companies' accounts beginning in first quarter 1978.

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USSR: Crude Oil Production [1]

	Million b/d
1970	7.06
1971	7.54
1972	8.01
1973	8.58
1974	9.18
1975	9.82
1976	10.37
1977	
Jan	10.64
Feb	10.69
Mar	10.83
Apr	10.85
May	10.86
Jun	10.93
Jul	10.95
Aug	10.97

[1] Including natural gas liquids.

USSR: Regional Production of Crude Oil [1]

Million b/d

	1970	1971	1972	1973	1974	1975	1976 [2]
Total	**7.06**	**7.54**	**8.01**	**8.58**	**9.18**	**9.82**	**10.4**
Urals-Volga	4.17	4.23	4.31	4.40	4.44	4.50	4.5
West Siberia	0.63	0.90	1.25	1.75	2.33	2.96	3.6
Central Asia	0.58	0.66	0.71	0.76	0.79	0.81	0.8
Azerbaydzhan SSR	0.40	0.38	0.37	0.36	0.36	0.34	0.3
North Caucasus	0.68	0.72	0.69	0.59	0.53	0.47	0.4
Ukrainian SSR	0.27	0.28	0.28	0.27	0.25	0.23	0.2
Komi ASSR	0.11	0.12	0.13	0.13	0.14	0.14	0.2
Belorussia SSR	0.08	0.11	0.12	0.14	0.16	0.16	0.2
Far East	0.05	0.05	0.05	0.05	0.05	0.04	Negl.
Other	0.09	0.09	0.10	0.13	0.13	0.17	0.1

[1] Including natural gas liquids.
[2] Preliminary.

USSR: Imports of Oil

Thousand b/d

	1970	1971	1972	1973	1974	1975	1976
Total	**90**	**130**	**180**	**290**	**110**	**150**	**128**
Middle East							
Egypt	40	40	20	4	3	5	3
Iraq	0	0	80	220	78	108	116
Other	50	90	80	66	29	37	9

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USSR: Exports of Oil

Thousand b/d

	1970	1971	1972	1973	1974	1975	1976
Total	**1,920**	**2,110**	**2,140**	**2,380**	**2,340**	**2,600**	**2,970**
Other Communist countries	**1,010**	**1,110**	**1,200**	**1,350**	**1,440**	**1,550**	**1,680**
Eastern Europe	805	895	975	1,100	1,180	1,260	1,370
Asia	30	25	20	20	30	40	40
Cuba	120	130	140	150	155	160	175
Yugoslavia	55	60	65	80	75	90	95
Free World countries	**910**	**1,000**	**940**	**1,030**	**900**	**1,050**	**1,290**
North America	5	0	10	30	20	15	23
Canada	0	0	0	0	3	5	2
United States	5	0	10	30	17	10	21
Western Europe	760	830	815	880	750	880	1,102
Finland	155	170	170	200	180	175	190
France	50	90	60	105	30	70	117
Italy	205	180	170	175	135	135	240
Netherlands	30	35	50	65	60	60	53
Sweden	95	90	90	65	60	70	55
West Germany	125	120	125	115	125	150	145
Other	100	145	150	155	160	220	302
Near and Middle East	60	60	50	30	30	45	56
Egypt	30	32	30	7	4	5	5
Greece	20	20	18	16	20	38	40
Other	10	8	2	7	6	2	11
Africa	25	30	35	35	23	20	23
Ghana	10	12	13	12	6	3	5
Morrocco	14	17	19	19	13	13	13
Other	1	1	3	4	4	4	5
Asia	60	80	30	55	52	60	65
India	5	10	8	10	20	25	22
Japan	54	66	20	41	25	26	35
Other	1	4	2	4	7	9	8
Latin America	0	0	0	0	25	30	21
Brazil	0	0	0	0	25	30	21

USSR: Oil Consumption

	Million b/d
1970	5.15
1971	5.46
1972	5.92
1973	6.33
1974	6.79
1975	7.20
1976	7.55

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USSR: Natural Gas Production
Million cm/d

1970	542.3
1971	581.9
1972	604.9
1973	647.5
1974	713.8
1975	792.6
1976	876.0
1977	
Jan	958.1
Feb	971.4
Mar	958.1
Apr	933.3
May	912.9
Jun	903.3
Jul	900.0
Aug	909.7

USSR: Regional Production of Natural Gas

Million cm/d

	1970	1971	1972	1973	1974	1975 [1]	1976 [2]
Total	**542.3**	**581.9**	**604.9**	**647.5**	**713.8**	**792.6**	**876.0**
Central Asia	131.7	148.1	162.8	196.0	226.0	260.0 [1]	285.6
Ukrainian SSR	166.8	177.0	184.1	186.6	187.2	188.2 [1]	187.7
North Caucasus	104.8	99.1	82.1	70.8	68.0	65.1	60.0 [3]
West Siberia	26.5	26.5	31.1	45.0	67.7	103.0	131.1
Komi ASSR	17.0	27.5	36.4	38.2	46.7	50.7 [1]	53.6
Azerbaydzhan SSR	15.0	15.9	18.7	22.9	24.9	27.1 [1]	30.1
Urals-Voga and other producing regions in the RSFSR	80.5	87.8	89.7	88.0	93.3	98.5 [1]	127.9

[1] Revised.
[2] Preliminary.
[3] Estimate based on average rate of decline during 1970-75.

USSR: Natural Gas Trade

Million cm/d

	1970	1971	1972	1973	1974	1975	1976
Exports	**9.0**	**12.5**	**13.9**	**18.7**	**38.5**	**53.0**	**70.4**
Eastern Europe	6.4	8.6	9.4	13.3	23.4	31.0	36.7
Bulgaria	0	0	0	0	0.8	3.2	6.1
Czechoslovakia	3.7	4.5	5.3	6.5	8.9	10.1	11.7
East Germany	0	0	0	2.1	7.9	9.1	9.2
Hungary	0	0	0	0	0	1.7	2.7
Poland	2.7	4.1	4.1	4.7	5.8	6.9	7.0
Western Europe	2.6	3.9	4.5	5.4	15.1	22.0	33.7
Austria	2.6	3.9	4.5	4.4	5.8	5.1	7.6
Finland	0	0	0	0	1.2	2.0	2.4
France	0	0	0	0	0	0	2.7
Italy	0	0	0	0	2.2	6.4	10.1
West Germay	0	0	0	1.0	5.9	8.5	10.9
Imports	**9.7**	**22.3**	**30.2**	**31.3**	**32.7**	**34.0**	**32.2**
Afghanistan	7.1	6.9	7.8	7.5	7.8	7.8	6.8
Iran	2.6	15.4	22.4	23.8	24.9	26.2	25.4

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USSR: Consumption of Natural Gas

	Million cm/d
1970	543.0
1971	591.7
1972	621.2
1973	660.1
1974	708.0
1975	773.6
1976	837.8

Eastern Europe: Oil Production and Consumption

Thousand b/d

	1970	1971	1972	1973	1974	1975	1976
Production	**384**	**393**	**404**	**410**	**417**	**423**	**429**
Bulgaria	7	6	5	4	3	2	2
Czechoslovakia	4	4	4	3	3	3	2
East Germany	1	1	1	1	1	1	1
Hungary	39	39	40	40	40	40	43
Poland	8	8	7	8	11	11	9
Romania	268	276	283	286	290	292	294
Yugoslavia	57	59	64	68	69	74	78
Consumption [1]	**1,225**	**1,374**	**1,509**	**1,782**	**1,777**	**1,884**	**2,016**
Bulgaria	184	212	222	248	268	248	259 [2]
Czechoslovakia	208	236	256	300	314	327	353 [2]
East Germany	182	202	259	272	269	282	305 [2]
Hungary	127	144	162	179	188	218	230
Poland	172	192	215	268	262	311	322
Romania	198	217	229	261	241	259	293 [2]
Yugoslavia	155	169	164	254	235	239	255

[1] Crude oil equivalent. Because of rounding, components may not add to totals shown.
[2] Estimated.

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Eastern Europe: Oil Trade

Thousand b/d

	1970	1971	1972	1973	1974	1975	1976 [1]
Crude Oil [2]							
Imports	**879**	**1,013**	**1,171**	**1,401**	**1,421**	**1,551**	**1,733**
USSR	679	800	921	1,044	1,108	1,242	1,355
OPEC	102	117	107	233	295	260	365
Iraq	40	53	28	53	93	125	112
Iran	62	64	71	94	63	72	14
Algeria	0	0	6	0	5	14	0
Libya	0	Negl.	2	0	4	9	13
Kuwait	0	0	0	4	0	15	0
Other	0	0	0	82 [3]	130 [3]	25 [3]	225 [3]
Non-OPEC	98	96	143	124	18	49	13
Belgium	0	0	0	0	6	4	0
West Germany	0	0	0	6	4	0	0
Netherlands	0	0	0	0	2	11	0
Syria	Negl.	0	7	3	Negl.	0	0
France	0	7	1	0	0	0	0
Other	98	89	135	115	6	25	13
Petroleum products							
Imports	**166**	**153**	**159**	**177**	**180**	**160**	**164**
Bulgaria	58	51	47	47	48	34	37
Czechoslovakia	22	20	21	25	27	21	25
East Germany	2	4	11	2	2	3	3
Hungary	19	16	14	20	21	19	21
Poland	48	45	47	61	60	63	64
Yugoslavia	17	17	19	22	22	20	14
Exports	**201**	**182**	**220**	**204**	**236**	**243**	**298**
Czechoslovakia	15	18	20	13	10	15	17
East Germany	26	20	47	48	58	57	55
Hungary	18	10	13	13	10	11	11
Poland	26	21	34	27	24	32	54
Romania	107	107	102	99	129	124	157
Yugoslavia	9	6	4	4	5	4	4

[1] Estimated.
[2] Crude oil exports are negligible.
[3] Including data that cannot be distributed by country of origin.

Eastern Europe: Natural Gas Production and Consumption

Million cm/d

	1970	1971	1972	1973	1974	1975	1976
Production	**100.09**	**110.27**	**121.00**	**132.76**	**137.03**	**144.04**	**155.89**
Bulgaria	1.30	0.90	0.60	0.61	0.49	0.30	0.10
Czechoslovakia	3.30	3.35	3.19	2.85	2.67	2.55	2.69
East Germany	3.38	7.82	13.85	19.21	21.18	19.92 [1]	19.00 [1]
Hungary	9.50	10.15	11.26	13.21	13.96	14.20	16.66
Poland	14.20	14.75	15.95	16.51	15.72	16.34	18.35
Romania	65.73	70.15	72.75	76.73	79.05	86.49	94.36 [1]
Yugoslavia	2.68	3.15	3.40	3.64	3.96	4.24	4.73
Consumption	**106.71**	**118.80**	**130.09**	**145.88**	**160.26**	**175.04** [1]	**193.52** [1]
Bulgaria	1.30	0.90	0.60	0.61	1.33	3.55	6.21
Czechoslovakia	6.78	7.56	8.23	9.11	11.49	12.92	15.42
East Germany	3.82	8.12	13.85	21.37	28.96	28.76 [1]	28.21 [1]
Hungary	10.05	10.72	11.81	13.76	14.51	16.41	19.97 [1]
Poland	16.95	18.83	20.06	21.19	21.52	23.22	25.27
Romania	65.18	69.60	72.20	76.20	78.49	85.94 [1]	85.39 [1]
Yugoslavia	2.63	3.07	3.34	3.64	3.96	4.24	4.73

[1] Estimated.

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Eastern Europe: Natural Gas Trade

Million cm/d

	1970	1971	1972	1973	1974	1975	1976
Imports	**7.46**	**9.50**	**10.02**	**13.92**	**23.89**	**31.65** [1]	**38.28** [1]
Bulgaria	0	0	0	0	0.84	3.25	6.11
Czechoslovakia	3.72	4.55	5.36	6.53	8.92	10.47	12.73
East Germany	0.44	0.30	Negl.	2.16	7.78	8.84	9.21
Hungary	0.55	0.57	0.55	0.55	0.55	2.21	3.31
Poland	2.75	4.08	4.11	4.68	5.80	6.88	6.92
Exports	**0.84**	**0.97**	**0.93**	**0.80**	**0.66**	**0.65** [1]	**0.65** [1]
Czechoslovakia	0.24	0.34	0.32	0.27	0.10	0.10	0.10 [1]
Romania	0.55	0.55	0.55	0.53	0.56	0.55 [1]	0.55 [1]
Yugoslavia	0.05	0.08	0.06	Negl.	0	0	0

[1] Estimated.

PRC: Oil Production, Consumption, and Exports

Thousand b/d

	1973	1974	1975	1976
Crude Oil Production	1,090	1,310	1,490	1,670
Crude Oil Consumption	920	1,030	1,300	1,500
Oil Exports [1]	40	110	210	190
Japan	19.4	78.1	157.6	121.2
Philippines	0	2.1	8.3	11.3
Thailand	0.4	0.8	1.1	5.9
Hong Kong	0.8	6.6	13.1	12.3
Other countries [2]	20	20	30	40

[1] Exports include both crude oil and petroleum products. Data are rounded to the nearest five thousand barrels.

[2] Rough estimate of sales to North Korea, Romania, and Vietnam. Sales to North Korea jumped sharply beginning in 1975 when a pipeline between PRC and North Korea was completed.

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PPG/R+D rec'd in error #601-#610 destroyed - PSD should have had these. To complete their dissem they renumbered ~~#651-660~~ - ~~601-610 filed in PPG/R+D~~ 601-610.

25X1

(31 cys of Survey - P&PD/Dissem sends DCD the IOD)		DCD Message Center, Rm. 811, Key Bldg. [redacted]
		Survey Only D/OCR 14 Dec 77
25X1		[redacted], O/D/DCI
		Survey Only Mr. Andy Reynolds DOE Old Post Office Bldg. Rm 211 12th & PA. Ave. N.W. Washington, D.C. 20461 16 Dec 77

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383 annoted cy ret'd & filed Survey Only: 21 Dec 77

25X1 [redacted] DCD via OCR/DSB 27 Dec 77

638-649 Destroyed 11 Jan 78

605 Ray, FX-5, Library 27 JAN 78

25X1 606 [redacted] OER/I/IE 2 Feb 78

608-610, 628-632 destroyed 8 Feb 78

25X1 3 cy Survey: [redacted] DDO/EA via OCR/DSB 7 Apr 78

25X1 1 cy Survey [redacted] via DCI 27 Apr 78

634, 635 Dest 22 May 78

25, 465, 607, 633, 637 Destroyed 9 Nov 78

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CONF: EA-12 INFO: FILE, VR, DDO-4, CA-4, CI-4, CRG, DDO/DO, EPS/EG-2, EUR-8, NFAC/CS, OER-3, ORPA-5, RES, RES/HSG, SDO, SIA, SIA/FL, (52/P)

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S E C R E T

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TO [redacted]

WNINTEL [redacted] 25X1 25X1

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SUBSTANCE OF FOLLOWING SANITIZED OVERVIEW FROM OER'S INTERNATIONAL ENERGY BIWEEKLY REVIEW ENDING 14 DECEMBER 1977 IS APPROVED FOR PASSING AT SECRET LEVEL UNDER TITLE, "OPEC MINISTERIAL MEETING." THIS ARTICLE WILL BE RELEASED BY OER ON 15 DECEMBER [redacted]

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10 S — 14 December 77

OPEC MINISTERIAL MEETING.

25X1

1. THE OPEC MINISTERIAL MEETING SCHEDULED FOR NEXT WEEK IN CARACAS IS NOT SHAPING UP AS THE HARMONIOUS AFFAIR CARTEL MEMBERS HAD BEEN HOPING FOR. SAUDI ARABIA AND IRAN ARE STILL FIRMLY SUPPORTING A PRICE FREEZE, MUCH TO THE FRUSTRATION OF COUNTRIES FAVORING AN INCREASE. UNTIL RECENTLY, PROPONENTS OF A PRICE HIKE WERE CONFIDENT THE SAUDIS AND IRANIANS WOULD ACCEDE TO A SMALL INCREASE TO AVOID A CONFRONTATION AND SPLIT SUCH AS OCCURRED LAST YEAR.

2. THE SAUDIS AND IRANIANS BOTH HAVE PUBLICLY REITERATED THEIR SUPPORT FOR A FREEZE SINCE THE SHAH'S WASHINGTON VISIT LAST MONTH. INDEED, RIYADH HAS SUGGESTED THAT THE PRICE ISSUE BE LEFT OFF THE MEETING'S AGENDA ENTIRELY. THE SAUDI STRATEGY AT CARACAS APPARENTLY WILL BE TO PRESS FOR NO ACTION AT ALL TO BE TAKEN ON PRICES, HOPING THIS WILL AVOID AN OPEN DIVISION WITHIN OPEC AND IN EFFECT LEAVE PRICES AT THEIR CURRENT LEVEL.

3. WHILE THERE IS STILL CONSIDERABLE PRESSURE IN THE CARTEL FOR A PRICE INCREASE, PROPONENTS HAVE GROWN MORE PESSIMISTIC OVER THEIR CHANCES OF NEGOTIATING ONE. MINISTER OF MINING SADLI OF INDONESIA, WHO TOURED THE MIDDLE EAST IN LATE NOVEMBER TO RALLY SUPPORT FOR A PRICE HIKE, HAS NOW BEEN AUTHORIZED BY PRESIDENT SUHARTO TO ACCEPT A SIX MONTH FREEZE IF SAUDI ARABIA AND IRAN INSIST ON IT.

4. VENEZUELAN PRESIDENT PEREZ IS AMONG THE MOST CONCERNED WITH THE OUTCOME OF THE OPEC MEETING. PEREZ HAD HOPED THAT HOSTING THIS YEAR'S CONFERENCE WOULD ENHANCE HIS IMAGE, BOTH DOMESTICALLY

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AND INTERNATIONALLY, AND IMPROVE HIS PARTY'S POLITICAL STANDING FOR NEXT YEAR'S NATIONAL ELECTIONS. LAST MONTH PEREZ SENT HIS OIL MINISTER TO THE MIDDLE EAST TO LAY THE GROUNDWORK FOR A UNIFIED PRICING DECISION AT CARACAS. WHILE MAKING LITTLE HEADWAY TOWARD A PRICE CONSENSUS, HERNANDEZ DID EXTRACT PLEDGES FROM CARTEL MEMBERS TO SEEK AN AGREEMENT IN THE INTERESTS OF OPEC UNITY. AT THE SAME TIME, PEREZ PUBLICLY CALLED FOR A 5- TO 8-PERCENT PRICE INCREASE, A POSITION HE CHARACTERIZED AS MODERATE AND ONE HE BELIEVED WOULD WIN ACCEPTANCE WITHIN THE CARTEL.

5. AT THE MOMENT, PEREZ RISKS GAINING VERY LITTLE POLITICALLY FROM HOSTING THE MEETING. A CONTINUED HARD LINE ON PRICES BY SAUDI ARABIA AND IRAN PRESENTS THE PROSPECTS OF A FREEZE, A SPLIT DECISION, OR AT LEAST HEATED DEBATE ON THE ISSUE. THE VENEZUELANS ARE CONTINUING LAST-MINUTE EFFORTS TO OBTAIN AN AGREEMENT BEFORE THE MEETING'S SCHEDULED OPENING ON 20 DECEMBER.

6. RIYADH AND TEHRAN MAY YET ASSENT TO A SMALL PRICE RISE NEXT WEEK. IF THEY DO, IT PROBABLY WILL REFLECT THEIR UNDERESTIMATION OF THE RESISTANCE TO A FREEZE AMONG OTHER OPEC STATES AND A DECISION THAT AN UNYIELDING POSITION IS TOO DIVISIVE. THE SAUDIS' CONCERN OVER SADAT'S RECENT POLITICAL INITIATIVES IN THE MIDDLE EAST HAS NOT ALTERED THEIR POSITION ON PRICES. (SECRET) E 1,2,3,IMPDET WNINTEL.>

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TO: [redacted] 25X1

FROM: CHIEF, OER INFO [redacted] NFAC/CS, NFAC/PPG/R&D.
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SUBJECT: WNINTEL RNVIEW -- OER'S INTERNATIONAL ENERGY BIWEEKLY REVIEW ARTICLES FOR RELEASE [redacted] 25X1

25X1

1. TWO ARTICLES RELEASED FROM OER'S INTERNATIONAL ENERGY BIWEEKLY REVIEW ENDING 14 DECEMBER 1977 [redacted] 25X1 (A) SOVIET YAKUTSK COAL BASIN DEVELOPMENT (SECRET/NOFORN/WNINTEL [redacted] -- NO SANITIZATION REQUIRED; AND (B) USSR: ELECTRIC POWER SHORTAGES (CONFIDENTIAL) RELEASABLE TO ALL. HARD COPY CONTAINS TWO SENTENCES AT END OF PARAGRAPH ONE WHICH WERE DELETED FROM CABLED TEXT AND NOT PASSED [redacted] "THIS ARTICLE IS THE FIRST OF TWO ON SOVIET ENERGY PROBLEMS. THE SECOND WILL EXAMINE SOVIET ENERGY CONSERVATION EFFORTS.". 25X1

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25X1 2. [redacted] AT YOUR DISCRETION SUBSTANCE OF ABOVE CABLED ARTICLES MAY BE PASSED IN ADVANCE OF RECEIPT OF HARD COPY PUBLICATION TO APPROPRIATELY CLEARED [redacted] REQUEST YOU MAKE NO REPEAT NO REFERENCE TO THIS PUBLICATION AS SUCH SINCE IT IS NOT RELEASABLE TO FOREIGN NATIONALS. E 2, IMPDET.> 25X1

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[redacted] 25X1

pg 12 USSR: Electric Power Shortages [redacted] 25X1

pg 15 - Yakutsk Coal - [redacted] only 25X1

p.17 delete last sentence para 1 beginning with "This article...

Yakutsk Coal reclass S/NF/WNINTEL [when released add] [redacted] 25X1

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Also released "Overview" see attached - Title changed to "OPEC Ministerial Meeting" 25X1

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OPEC MINISTERIAL MEETING

The OPEC ministerial meeting scheduled for next week in Caracas is not shaping up as the harmonious affair cartel members had been hoping for. Saudi Arabia and Iran are still firmly supporting a price freeze, much to the frustration of countries favoring an increase. Until recently, proponents of a price hike were confident the Saudis and Iranians would accede to a small increase to avoid a confrontation and split such as occurred last year.

The Saudis and Iranians both have publicly reiterated their support for a freeze since the Shah's Washington visit last month. Indeed, Riyadh has suggested that the price issue be left off the meeting's agenda entirely. The Saudi strategy at Caracas apparently will be to press for no action at all to be taken on prices, hoping this will avoid an open division within OPEC and in effect leave prices at their current level.

While there is still considerable pressure in the cartel for a price increase, proponents have grown more pessimistic over their chances of negotiating one. Minister of Mining Sadli of Indonesia, who toured the Middle East in late November to rally support for a price hike, has now been authorized by President Suharto to accept a six-month freeze if Saudi Arabia and Iran insist on it.

Venezuelan President Perez is among the most concerned with the outcome of the OPEC meeting. Perez had hoped that hosting this year's conference would enhance his image, both domestically and internationally, and improve his party's political standing for next year's national elections. Last month Perez sent his oil minister to the Middle East to lay the groundwork for a unified

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pricing decision at Caracas. While making little headway toward a price consensus, Hernandez did extract pledges from cartel members to seek an agreement in the interests of OPEC unity. At the same time, Perez publicly called for a 5- to 8-percent price increase, a position he characterized as moderate and one he believed would win acceptance within the cartel.

At the moment, Perez risks gaining very little politically from hosting the meeting. A continued hard line on prices by Saudi Arabia and Iran presents the prospects of a freeze, a split decision, or at least heated debate on the issue. The Venezuelans are continuing last-minute efforts to obtain an agreement before the meeting's scheduled opening on 20 December.

Riyadh and Tehran may yet assent to a small price rise next week. If they do, it probably will reflect their underestimation of the resistance to a freeze among other OPEC states and a decision that an unyielding position is too divisive. The Saudis' concern over Sadat's recent political initiatives in the Middle East has not altered their position on prices.

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OPEC MINISTERIAL MEETING

The OPEC ministerial meeting scheduled for next week in Caracas is not shaping up as the harmonious affair cartel members had been hoping for. Saudi Arabia and Iran are still firmly supporting a price freeze, much to the frustration of countries favoring an increase. Until recently, proponents of a price hike were confident the Saudis and Iranians would accede to a small increase to avoid a confrontation and split such as occurred last year.

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The Saudis and Iranians both have publicly reiterated their support for a freeze since the Shah's Washington visit last month. Indeed, Riyadh has suggested that the price issue be left off the meeting's agenda entirely. The Saudi strategy at Caracas apparently will be to press for no action at all to be taken on prices, hoping this will avoid an open division within OPEC and in effect leave prices at their current level.

While there is still considerable pressure in the cartel for a price increase, proponents have grown more pessimistic over their chances of negotiating one. Minister of Mining Sadli of Indonesia, who toured the Middle East in late November to rally support for a price hike, has now been authorized by President Suharto to accept a six-month freeze if Saudi Arabia and Iran insist on it.

Venezuelan President Perez is among the most concerned with the outcome of the OPEC meeting. Perez had hoped that hosting this year's conference would enhance his image, both domestically and internationally, and improve his party's political standing for next year's national elections. Last month Perez sent his oil minister to the Middle East to lay the groundwork for a unified

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pricing decision at Caracas. While making little headway toward a price consensus, Hernandez did extract pledges from cartel members to seek an agreement in the interests of OPEC unity. At the same time, Perez publicly called for a 5- to 8-percent price increase, a position he characterized as moderate and one he believed would win acceptance within the cartel.

At the moment, Perez risks gaining very little politically from hosting the meeting. A continued hard line on prices by Saudi Arabia and Iran presents the prospects of a freeze, a split decision, or at least heated debate on the issue. The Venezuelans are continuing last-minute efforts to obtain an agreement before the meeting's scheduled opening on 20 December.

Riyadh and Tehran may yet assent to a small price rise next week. If they do, it probably will reflect their underestimation of the resistance to a freeze among other OPEC states and a decision that an unyielding position is too divisive. The Saudis' concern over Sadat's recent political initiatives in the Middle East has not altered their position on prices.

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OPEC Ministerial Meeting

~~Overview~~

The OPEC ministerial meeting scheduled for next week in Caracas is not shaping up as the harmonious affair cartel members had been hoping for. Saudi Arabia and Iran are still firmly supporting a price freeze, much to the frustration of countries favoring an increase. Until recently, proponents of a price hike were confident the Saudis and Iranians would accede to a small increase to avoid a confrontation and split such as occurred last year. ~~Now Venezuelan oil minister Hernandez feels OPEC is in such a confused state over prices that almost anything could occur at Caracas.~~

The Saudis and Iranians both have publicly reiterated their support for a freeze since the Shah's Washington visit last month. Indeed, Riyadh has suggested that the price issue be left off the meeting's agenda entirely. The Saudi strategy at Caracas apparently will be to press for no action at all to be taken on prices, hoping this will avoid an open division within OPEC and in effect leave prices at their current level. ~~The United Arab Emirates and Qatar are supporting the Saudis, and, with strong Iranian backing, they could succeed.~~

While there is still considerable pressure in the cartel for a price increase, proponents have grown more pessimistic over their chances of negotiating one. Minister of Mining Sadli of Indonesia, who toured the Middle East in late November to rally support for a price hike, has now been authorized by President Suharto to accept a six-month freeze if Saudi Arabia and Iran insist on it. ~~There is also some speculation that the most hawkish OPEC states—Iraq, Libya, and Algeria—may not send their oil ministers to Caracas unless Riyadh agrees beforehand not to block action on prices. These countries, who favor a 10-percent rise at a minimum, would send lesser delegations instead.~~

Venezuelan President Perez is among the most concerned with the outcome of the OPEC meeting. Perez had hoped that hosting this year's conference would enhance his image, both domestically and internationally, and improve his party's political standing for next year's national elections. Last month Perez sent his oil minister to the Middle East to lay the groundwork for a unified pricing decision at Caracas. While making little headway toward a price consensus, Hernandez did extract pledges from cartel members to seek an agreement in the interests of OPEC

Note: Comments and queries regarding this publication are welcome. They may be directed to [redacted] of the Office of Economic Research, telephone 351-5804.

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unity. At the same time, Perez publicly called for a 5- to 8-percent price increase, a position he characterized as moderate and one he believed would win acceptance within the cartel.

At the moment, Perez risks gaining very little politically from hosting the meeting, ~~and may even suffer a serious loss of prestige.~~ A continued hard line on prices by Saudi Arabia and Iran presents the prospects of a freeze, a split decision, or at least heated debate on the issue. ~~All would be embarrassing to Perez. Caracas has considered postponing or canceling the meeting, but this also would be damaging politically.~~ The Venezuelans ~~instead~~ are continuing last-minute efforts to obtain an agreement before the meeting's scheduled opening on 20 December.

Riyadh and Tehran may yet assent to a small price rise next week. If they do, it probably will reflect their underestimation of the resistance to a freeze among other OPEC states and a decision that an unyielding position is too divisive. ~~Moreover, several Saudi leaders are sympathetic to the argument made by several OPEC members that some increase in prices is justified on economic grounds because of inflation and the declining value of the dollar.~~ The Saudis' concern over Sadat's recent political initiatives in the Middle East has not altered their position on prices.

~~The Saudis expect to win approval of a freeze on oil prices for at least six months at Caracas. The length of a freeze may be a moot issue, however; Saudi oil minister Yamani sees market forces exerting upward pressure on prices by mid-1978.~~ (Secret ~~Noforn Nocontract Orcon~~)

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- [ ] USSR
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This is a machine-supported system and information must be gathered in a formatted fashion. Therefore, each analyst must complete the NON-SHADED parts of section I and II of this form. Please type or print legibly. Questions should be directed to A/Comp/R&E Room 3E63 x 7871 (black) x 1724 (red).

SECTION I

NAME AND TELEPHONE NUMBER: x7109

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GENERAL INSTRUCTIONS

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SECTION I

NAME AND TELEPHONE NUMBER OF ANALYST: x7107

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