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CENTRAL INTELLIGENCE AGENCY

021742/12

22 December 1948

INTELLIGENCE MEMORANDUM NO. 99

SUBJECT: Possible Cessation of Soviet Manganese Shipments to the USA

1. US requirements in metallurgical manganese ore at this time are about 1.3 million long tons per year, of which all but about 125,000 tons are imported.

2. In 1948 the rate of imports from most of the important producing countries has dropped. Estimated imports from India, Union of South Africa, Brazil, Gold Coast, Cuba, and Chile will be about 590,000 long tons as against over 980,000 long tons in 1947.

3. Up to December, the USSR had been exporting to the US at an increased rate over 1947, estimated imports for 1948 being about 350,000 long tons, as against 280,000 tons in 1947. In sum, it would appear that (a) the total US supply in 1948 will fail to meet consumption requirements by approximately 175,000 tons, and (b) stocks in the US will be seriously depleted rather than added to as is the intention in the stockpiling program. Had it not been for the heavy Soviet imports, it is apparent that in 1948 the US would have failed to meet consumption requirements by about 40 percent of demand.

4. Reports received indicate that in early December a change in policy took place in the USSR in regard to shipments of manganese to the US. It is now uncertain whether or not shipments will be made to the US in 1949, and it is significant that apparently, no ships have cleared Russian ports since 7 December with manganese destined for the US.

5. Should this policy on the part of the USSR be proved by events in the near future, the US would be confronted in 1949 with a most serious situation in which the current rate of imports and total supply would fail to meet needs by about 40 percent, even more if the major sources of imports continue to decrease their rate of shipments to the US.

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