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INTELLIGENCE BRIEF

THE PATTERN OF NORTH VIETNAM'S SEABORNE FOREIGN TRADE
WITH COUNTRIES OF THE FREE WORLD, 1964

DIRECTORATE OF INTELLIGENCE

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THE PATTERN OF NORTH VIETNAM'S SEABORNE FOREIGN TRADE
WITH COUNTRIES OF THE FREE WORLD, 1964*

During 1964 the seaborne foreign trade of North Vietnam totaled a minimum of 2.2 million metric tons, of which 1.6 million tons were export cargoes and 638,000 tons were import cargoes. These seaborne shipments account for the overwhelming proportion of the volume of North Vietnam's foreign trade. A breakdown of North Vietnamese seaborne imports and exports by major commodity and flag of carriage is shown in Tables 1 and 2. These estimates are based on reasonably firm but incomplete data on the cargoes moving in and out of North Vietnam. The incompleteness of the data is particularly acute in regard to the cargoes carried in and out of North Vietnam on Chinese Communist-flag shipping.

During 1964, at least 580 flag vessels involving some 2.6 million gross register tons (GRT) of shipping called at ports of North Vietnam. Ships flying Free World flags accounted for about 60 percent of the shipping tonnage and about 70 percent of the ship arrivals in 1964. Free World vessels accounted for 45 percent of the import cargoes and 85 percent of the export cargoes moved by sea during the year. The smaller share of import cargoes reflects North Vietnam's great reliance on Bloc countries for most of its imports. One result is that about three-fourths of the Free World ships calling at North Vietnamese ports arrive either in ballast or with negligible cargoes.

1. Pattern of Free World Shipping

Virtually all of the Free World ships calling at North Vietnamese ports in 1964 were engaged in tramp operations. These vessels were almost exclusively dry cargo ships, ranging in size from 1,260 to 14,000 GRT. Their average size was just over 4,000 GRT. British-flag vessels accounted for 30 percent of the arrivals in 1964 and were

* The estimates in this publication represent upward revisions of those published in CIA/RR CB 65-20, Merchant Shipping to North Vietnam in 1964, March 1965, SECRET/NO FOREIGN DISSEM. The analysis covers only the physical volume of North Vietnamese seaborne foreign trade. Seaborne trade moving on Chinese-flag shipping, however, and foreign trade moving by land transportation have not been included. The findings based on commodity movements and trading partners, therefore, will differ somewhat from those based on analysis of official trade statistics in value terms.

almost all under long-term time charter to either North Vietnam or Communist China. These vessels, averaging 3,460 GRT, are rather continuously employed in a shuttle service between Haiphong and Hong Kong or between Haiphong and Chinese ports. British-flag shipping under Japanese charter played a significant role in the transport of coal from North Vietnam to Japan, accounting for 30 percent of the total transported to Japan in 1964.

Japanese-flag shipping, which accounted for 13 percent of total arrivals in 1964, averaged 3,340 GRT. With but few exceptions, Japanese-flag ships were engaged exclusively in the coal trade between North Vietnam and Japan.

The Norwegian flag, which ranked third in Free World shipping to North Vietnam in 1964, accounted for 7 percent of total arrivals. These ships, averaging only 2,950 GRT, were under long-term charter to North Vietnam, Communist China, or the USSR. The Norwegian ships under charter to North Vietnam were used principally for trade with Cambodia and Malaysia.

Ships of other Free World flags participating in the North Vietnamese trade generally were larger vessels that were engaged in the long-term movement of bulk cargoes from North Vietnam to Western Europe, Soviet Bloc countries, and Cuba. Most of these ships, ranging from 6,000 to 7,000 GRT, flew the flags of Greece, Lebanon, Liberia, and Panama but were under charter to Bloc countries.

2. Nature and Volume of Exports to Free World Countries

During 1964, identifiable exports by sea from North Vietnam reached 1.6 million tons. A total of 914,000 tons, or 60 percent of identified seaborne exports, moved to countries of the Free World, principally to trading partners in Southeast Asia and to Japan (see Tables 2 and 3).

The exports of North Vietnam consisted almost entirely of coal, cement, pig iron, and apatite. The export of anthracite coal from Cam Pha and Hon Gay dominated North Vietnam's export trade in 1964 and accounted for 60 percent of the total volume of seaborne exports. About 60 percent -- 420,000 tons -- of the total amount of coal exported to the countries of the Free World went to Japan. The identified export of coal to Japan in 1964 was about 20 percent lower than the average annual export over the past few years.

Other North Vietnamese bulk exports to Japan in 1964 included an estimated 44,000 tons of pig iron and about 14,000 tons of apatite ore. Exports of miscellaneous cargoes to Japan in 1964 totaled 6,600 tons, or 35 percent of total exports of miscellaneous cargoes shipped to the Free World. Although the commodities composing this classification cannot be identified specifically, they are presumed to have consisted principally of agricultural, forestry, fishing, and handicraft products.

The port of Hong Kong ranked second as the destination of North Vietnamese exports in 1964. The principal export to Hong Kong was cement, which at a volume of 44,000 tons amounted to one-third of the total exports of cement to countries of the Free World. The remaining exports to Hong Kong consisted of 10,600 tons of anthracite coal, about 8,000 tons of rice, and an estimated 8,800 tons of miscellaneous cargoes, including 4,600 tons of livestock and animal products.

Cambodia and Malaysia accounted for the remainder of North Vietnam's exports to countries in Southeast Asia. In each instance the major export was cement, which accounted for roughly 95 percent of North Vietnamese exports to these countries.

Most of the balance of North Vietnam's export trade with countries of the Free World involved a movement of anthracite coal to consumers in Western Europe. More than 40 percent of this trade was with France, which accounted for 100,000 tons of the 247,000 tons exported to Western Europe in 1964. The other major importers of coal in Western Europe were the Netherlands (64,000 tons), Belgium (41,000 tons), and Italy (31,000 tons).

3. Seaborne Imports from the Free World

Identified seaborne imports by North Vietnam from countries of the Free World in 1964 amounted to 175,000 tons (see Table 4) -- only 20 percent of the level of its exports to countries of the Free World. About 80 percent of these imports consisted of grains, foodstuffs, and bulk commodities. The principal identified imports of foodstuffs included about 38,000 tons of flour from France, 45,000 tons of corn from Thailand and Cambodia, 14,000 tons of grain from Argentina, and 5,500 tons of rice from Cambodia. The other major bulk commodity imports included an estimated 37,000 tons of fertilizers, principally from Italy.

At least 16,000 tons of general cargo were imported by North Vietnam in 1964. More than 75 percent of these imports came from Japan and consisted of medicines, textiles, chemicals, industrial equipment, and spare parts. In addition, 15,000 tons of timber were imported from Cambodia. The volume of imports of equipment and general cargo from Western Europe could not be estimated, because it was picked up at way ports by Polish vessels providing a liner service to North Vietnam.

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Table 1

North Vietnam: Seaborne Imports Carried by Foreign-Flag Ships, 1964

Thousand Metric Tons

Commodity	Flag				Total
	Free World	USSR	European Satellites	Communist China	
Total	<u>287</u>	<u>266</u>	<u>62</u>	<u>23</u>	<u>638</u>
Corn, grains, and bulk foodstuffs	123	0	19	20	162
Ammonium sulfate and other fertilizers	52	91	22	N.A.	165
POL	31	109	2	N.A.	142
Timber	15	0	2	N.A.	17
Miscellaneous	66	66	17	3	152

S-E-C-R-E-T

S-E-C-R-E-T

Table 2

North Vietnam: Seaborne Exports Carried by Foreign-Flag Ships, 1964

Commodity	Flag				Total
	Free World	USSR	European Satellites	Communist China	
Total	<u>1,337.9</u>	<u>128.6</u>	<u>98.4</u>	N.A.	<u>1,564.9</u>
Coal	919.2	6.6	24.2	N.A.	950.0
Apatite	259.6	37.6	41.0	N.A.	338.2
Cement	88.1	43.7	8.3	N.A.	140.1
Miscellaneous	71.0	40.7	24.9	N.A.	136.6

Thousand Metric Tons

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Table 3

North Vietnam: Seaborne Exports to Countries of the Free World, 1964

Thousand Metric Tons

Commodity	Hong Kong	Japan	Cambodia	Singapore/Malaysia	Western Europe	Other	Total
Total	<u>71.8</u>	<u>484.9</u>	<u>37.4</u>	<u>62.1</u>	<u>246.6</u>	<u>11.2</u>	<u>914.0</u>
Coal	10.6	421.0	37.0	2.5	246.4	10.0	690.5
Cement	44.5			58.6			140.1
Apatite		13.7					13.7
Pig iron		43.6					43.6
Rice	7.9						7.9
Miscellaneous	8.8	6.6	0.4	1.0	0.2	1.2	18.2

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Table 4

North Vietnam: Seaborne Imports from Countries of the Free World, 1964

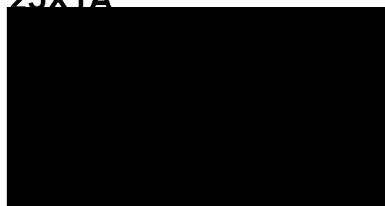
Commodity	Thousand Metric Tons							
	Cambodia	Thailand	Singapore/Malaysia	Japan	Hong Kong	Western Europe	Others	Total
Total	36.1	29.2	6.7	12.7	1.7	62.7	25.8	174.9
Corn, grains, and bulk foodstuffs	21.4	29.2				37.7	14.0	102.3
Fertilizers			3.9			25.0	8.4	37.3
Timber	14.7							14.7
Miscellaneous			2.8	12.7	1.7		3.4	20.6

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Coord:



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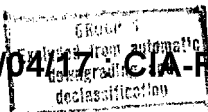
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