

NATIONAL PETROLEUM COUNCIL
REPORT OF THE COMMITTEE ON
PETROLEUM TRANSPORTATION
(Tank Truck Census)

January 29, 1952

OFFICE COPY

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Office of the President

January 21, 1952

Mr. W. S. Hallanan, Chairman
National Petroleum Council
Suite 601
1625 'K' Street, N. W.
Washington 6, D. C.

Dear Mr. Hallanan:

In your letter of May 10th, 1951, you asked that the Committee on Petroleum Transportation undertake the assignment of making a census of trucks in certain categories as requested by Mr. Hugh A. Stewart, Acting Director of the Oil and Gas Division of the Department of the Interior, in his letter of May 8th, 1951 (copy attached), which had received the approval of the Council's Agenda Committee and the Council.

As it was apparent that a "census" of tank trucks by local physical enumeration would be a costly, difficult project involving long delay, the Committee on Petroleum Transportation obtained clearance through informal discussions with the Petroleum Administration for Defense, the Oil and Gas Division and the Chairman of the NPC Agenda Committee, Mr. A. Jacobsen, for a survey method which all concerned believed would provide the desired information with the least expenditure of time, effort and money.

The Tank Truck Census which has been limited by agreement to "over-the road" trucks was assigned to the Sub-Committee on Transport Trucks of which Mr. Lee R. Cowles is chairman. The roster of membership of the Sub-Committee on Transport Trucks is attached. The Sub-Committee followed the general lines of procedure set out below in obtaining the required information:

1. For-Hire Trucks (Covers common and contract carriers in the Petroleum, Chemical and Liquefied Petroleum Gas Service)

The census of all for-hire tank trucks in Petroleum, Chemical and LPG Service was made by National Tank Truck Carriers, Inc. under the direction of Mr. Sam F. Niness.

2. Private Tank Trucks (Petroleum Service)

The data made available by the Bureau of Census in its 1948 census of business were used as the basis and the figures were brought up-to-date by accepted statistical formulae under the direction of Mr. Frank C. Perry of Atlantic Refining Company and Truck Transport Consultant to PAD.

1-21-52

3. Private Tank Trucks (Chemical Service)

The census of private tank trucks in Chemical Service was conducted by the Traffic Committee of the Manufacturing Chemists Association, Inc, under the Chairmanship of Mr. Julian C. Sloss and the direction of Mr. C. N. Mayhood.

4. Private Tank Trucks (Liquefied Petroleum Gas Service)

The census of private tank trucks in LPG Service was assigned to the Council's Committee on Liquefied Petroleum Gas availability, transportation and materials requirements under the Chairmanship of Mr. W. K. Warren. The status of this portion of the survey is specified in the report of the Sub-Committee on Transport Trucks.

The report of the Sub-Committee on Transport Trucks is enclosed herewith. Since it appeared that the report of the Sub-Committee is responsive to the original assignment as subsequently modified in informal discussions (to which reference has already been made) and since the report contains purely factual data assembled by experts in the particular fields, the Committee on Petroleum Transportation has adopted the report of its Sub-Committee and herewith respectfully transmits that report as its own.

Because of the lack of responsible existing data, the Tank Truck Census assignment was an exceedingly complicated and difficult task. Grateful acknowledgment is made to the Chairman and members of the Sub-Committee on Transport Trucks, to Messrs. Niness and Sutherland of National Tank Truck Carriers, Inc., to Mr. Frank C. Perry and to representatives of the Bureau of the Census, Defense Transport Administration and Petroleum Administration for Defense who cooperated so generously in assembling the information. Without this assistance the information contained in the report could not have been obtained.

Respectfully submitted,

P. C. Spencer, Chairman
Committee on Petroleum Transportation
National Petroleum Council

TANK TRUCK CENSUS REPORT OF THE SUBCOMMITTEE ON TRUCK
TRANSPORTATION OF THE TRANSPORTATION COMMITTEE
NATIONAL PETROLEUM COUNCIL

On May 8, 1951, Mr. H. A. Stewart, Acting Director of the Oil and Gas Division of the Department of the Interior, directed a letter to the National Petroleum Council requesting that a census be conducted of the nation's over-the-road or intercity tank truck facilities.

The Agenda Committee of the National Petroleum Council recommended that the matter be referred to the Council's Transportation Committee with directions to make the census as requested, and report to the Council. The National Petroleum Council approved the Agenda Committee's recommendation, and the matter was referred to Mr. P. C. Spencer, Chairman of the National Petroleum Council's Transportation Committee. The matter was in turn referred to the Petroleum Truck Transportation Sub-Committee of the Transportation Committee which had previously been appointed for the purpose of studying and reporting on the adequacy of over-the-road petroleum tank truck transportation facilities. This Committee held informal meetings on May 17 and May 23 to discuss ways and means of conducting such a census. It was the consensus of the Committee that the census should be conducted as follows:-

1. Private Tank Trucks in Petroleum Service - It was felt that the December 31, 1948 census of manufacturing and distributing establishments conducted by the United States Bureau of Census, Department of Commerce, inasmuch as it separated

tank trucks and trailer facilities by states from other data, would provide as accurate and thorough a coverage of tank trucks and trailers operated by private carriers as could be developed by any direct census; which would have involved contacting every producer, refiner, marketer, jobber and distributor throughout the United States. 1948 census figures could be appropriately adjusted by acceptable statistical methods.

2. Private Tank Trucks in Chemical Service - An inventory of private tank trucks in chemical service would be made by the Manufacturing Chemists' Association, Inc.
3. Private Tank Trucks of the Pressure Type in LPG Service - This part of the census would be conducted by the National Petroleum Council's Committee on LPG production and transportation.
4. For-Hire Tank Trucks - A direct census of for-hire trucks would be made by the National Tank Truck Carriers, Inc., which has the organization competent to do the job. Such a census would produce a reliable inventory of for-hire tank trucks in petroleum and chemical service.

The Truck Transportation Sub-Committee, in April of 1947 and in September of 1950 had conducted a survey and forecast in an attempt to determine the available petroleum tank truck facilities in the United States. These previous surveys had

been conducted by using as an original basis the actual known capacity and inventory as revealed in 1944 in the report of the Office of Defense Transportation inventory of tank trucks taken from the Certificate of War Necessity Program used during World War II. Spot checks on a geographical basis were made to determine current fleet capacities and were used as a basis of projecting the nation's tank truck fleet as of the dates the previous reports were made.

In determining what was to be considered as an over-the-road or intercity tank truck in the 1947 and 1950 surveys an arbitrary minimum capacity of 2,000 gallons was used. Because of the limited time available in previous surveys, and the manner in which the surveys were conducted, the Committee has submitted these previous reports only as estimates as to existing facilities. Because of the great lapse of time since the Office of Defense Transportation's inventory in 1944, it was the opinion of the Committee that an actual census of the for-hire tank truck industry should be made and the factors gleaned from this inventory would be used as a check against the private carrier fleet as reflected in the 1948 business census.

The current census differs from the other surveys in the definition used in determining what was an over-the-road or intercity petroleum tank truck. It was the consensus of the Committee that the arbitrary 2,000 gallon capacity was no longer applicable. The Committee therefore decided that an inventory of all of the petroleum semi-trailer and trailer tanks would more correctly reflect the size and capacity of the present over-the-road or intercity tank truck fleet. This report covers that type of equipment.

Report of the For-Hire Census

In response to the request of the Truck Transportation Subcommittee of the Transportation Committee, the National Tank Truck Carriers, Inc., undertook a complete census of all for-hire tank trucks throughout the United States. A Questionnaire Form approved by the Bureau of the Budget (No. 42-5121) was mailed to 1,543 companies and individuals believed to be in the for-hire transportation of petroleum products either as common or contract carriers operating in interstate or intrastate commerce. This list had been compiled originally from the Office of Defense Transportation's Certificate of War Necessity Program and kept current by periodic checks with State Motor Vehicle Registrations. It was also checked and corrected through the cooperation of the Motor Carrier Associations in each of the states and the District of Columbia.

It is the opinion of the Committee, that every for-hire motor carrier operating tank truck equipment in the United States was contacted in this census. With the cooperation of the Defense Transport Administration, whose field force made personal contacts throughout the United States, 1,529 completed forms were received, representing a 99% return. Of this number, 1,063 of the original mailing were revealed to be for-hire carriers and the balance of the returns were from those who had either gone out of business or were now operating as private carriers. The figures and data contained herein reflect only the equipment operated by the 1,063 for-hire tank truck carriers in the United States.

The Questionnaire requested the separation of general purpose tank trailers, pressure type tank trailers, chemical and

other special equipment. Information requested included the number of units operated as tractor-semi-trailers, truck-full trailer, and semi and full trailer, insofar as general purpose tank truck equipment was concerned. The information on special tank trailer equipment requested a separation by operating pressures and capacities of those units designed for the transportation of liquefied petroleum gas, and similar information on equipment constructed under ICC Specification MC 310 used for the transportation of chemicals. Information as to number, size and type of other special equipment such as stainless steel, aluminum tanks, etc., was secured. The Questionnaire also developed the total annual mileage by fleets, the total gallonage hauled during the year ending June 1, 1951.

The returns were separated by states and the states grouped in the districts as established by the Petroleum Administration for Defense. The census indicates that the nation's for-hire tank truck fleet is owned and operated by 1,063 individuals or companies who operate 10,613 general purpose tractor-semi trailer units, 2,875 trains consisting of a straight truck and a full trailer or a tractor-semi and full trailer. These latter units are commonly known in the industry as double bottoms. This is a total of 13,488 general purpose units with a total carrying capacity of 73,024,635 gallons with a national average of 5,414 gallons each. Pressure equipment consisted of 140 units designed to operate at 100 lbs. pressure or less, 339 units designed to operate between 100 and 300 lbs. pressure, and 27 units designed

to operate at pressures in excess of 300 lbs. for a total of 506 pressure units with a total water capacity of 2,580,252 gallons and an average capacity of 5,099 water gallons.

In the chemical tanks, the report reveals 135 sulphuric acid tanks, 27 muriatic acid tanks and 9 nitric acid tanks built to conform with ICC Specification MC 310. The total capacity of this equipment is 567,888 gallons with an average capacity of 3,321 gallons. Other special equipment consisting of tanks built of stainless steel, aluminum and other material designed for the transportation of such commodities as hot asphalt, various chemicals, liquid sulphur, rubber latex, glue, caustic soda, totalled 1,381 units with a total capacity of 5,715,283 gallons with an average capacity of 4,139 gallons. This makes a total nation wide for-hire tank truck fleet of 15,546 operating units of all types.

The information concerning operations revealed that this fleet has an annual mileage of 816,872,661 miles in petroleum service only, and transported during the 12 months ending June 1, 1951, 29,784,133,452 gallons of petroleum products.

The details of the above information broken down by PAD Districts 1 to 5 is shown in Appendices "A" to "E" inclusive.

REPORT OF PRIVATE CARRIER CENSUS

The 1948 business census conducted by the Bureau of Census, Department of Commerce, dealing with the petroleum bulk stations and the distribution terminals was used as a basis for determining the number of trailers and semi-trailers in petroleum service and operated by private carriers as of June 1, 1951. The census was taken as of December 31, 1948 and showed that there was a total of 8,052 tank trailers and tank semi-trailers operating out of petroleum bulk plants and distributing terminals.

Semi-Trailers

The inventory of 8,052 tank trailers and tank semi-trailers as reported by the Bureau of Census for wholesale and distributive industries as of December 31, 1948, was divided by states. This information in turn was grouped in districts as established by the Petroleum Administration for Defense. In order to bring the private carrier fleet up to June 1, 1951 inventory, the number in each state was increased by 20% which reflected the growth in the average daily domestic* demand for gasoline, kerosene and distillates from December 31, 1948 to June 1, 1951. This results in a total private carrier fleet of 9,665 tank trailers and tank semi-trailers.

The use of the 20% increase results in a figure (1,613 trailers) almost identical with the difference between the new production of 5,564 tank trailers during the years 1949 to 1950, less the 3,941 reported purchased by the for-hire tank truck industry during the same period.

*Bureau of Mines figures

By taking 90% of the maximum gross weight permitted by each state, we have arrived at the average capacity of the tank trailers operated in each state. We have grouped this census by Petroleum Administration for Defense districts and arrived at a mathematical average in each district and the United States as a whole. The result of this approach is shown in Appendix "F".

Straight Tank Trucks in Private Carrier Service

In considering tank truck facilities available in private carrier service, the large straight tank trucks ranging in capacity from 2,000 to 3,000 gallons used primarily in the transportation of domestic fuel oil during the heating season, cannot be entirely overlooked. An examination of the Bureau of Census figures reveals that there were approximately 10,193 such units in operation and if increased by the same percentage of the increase in gasoline, kerosene, distillates and residual fuel oil demand since 1948 which was 16.4%*, would result in a total of 11,865 units as of June 1, 1951. In extreme emergencies, it is believed that a portion of this fleet could be made available at certain times of the year for a limited over-the-road or intercity service.

Report of Census of Tank Trailers and Semi-Trailers in Chemical Service Operated by the Chemical Industry as Private Carriers as of June 1, 1951

The census of tank trailers and semi-trailers privately operated by the chemical industry was conducted by the Manufacturing Chemists' Association, Inc., Washington, D. C. The questionnaire was circulated to all the members of the Manufacturing Chemists' Association and approximately 75 percent replied. Follow-ups were sent to the remaining 25 percent, and when no replies were

*Bureau of Mines figures

received after a reasonable interval, it was assumed that they did not operate the types of equipment in question. Accordingly, it would appear that the data reflects 100 percent returns covering the members of the Manufacturing Chemists' Association, Inc.

The members of the Manufacturing Chemists' Association manufacture and ship approximately 90 percent of the tonnage of chemicals produced in the United States. The report is as shown in Appendix "G".

Report of Census of Pressure Units Designed for the
Transportation of Liquefied Petroleum Gas
and Operated as Private Carrier Fleets

Satisfactory information concerning this type of equipment is not yet available with respect to private trucks in LPG service. The Subcommittee will continue its efforts to obtain such information if the Oil and Gas Division requests that such action be taken.

A table showing the total census of private and for-hire general purpose tank trailers and semi-trailers is shown in Appendix "H".

It is the opinion of the group that if wartime measures were adopted, such as twenty-four hours per day operations, seven days per week, reciprocity as to various state laws and regulations, the freer use of interchange of operating rights, and the fleet maintained at its present size and kept in good operating condition, the existing carrying capacity could be increased approximately 35%.

Respectfully submitted,



Lee R. Cowles, Chairman
Truck Transportation Subcommittee,
National Petroleum Council

January 29, 1952

APPENDIX A

GENERAL PURPOSE TANK TRAILER EQUIPMENT
(For Hire)

	Number of Carriers in District	Units Tractor- Semi Trailers	Units Trains (Truck-Full Trailer, Semi and Full Trailer	Total Complete Units	Total Capacity (Gallons)	Average Capacity Per Unit
PAD District No. 1	392	4,946	11	4,957	23,333,257	4,707
PAD District No. 2	331	3,427	982	4,409	25,362,124	5,752
PAD District No. 3	94	1,589	22	1,611	7,969,223	4,947
PAD District No. 4	58	402	345	747	4,694,374	6,284
PAD District No. 5	188	249	1,515	1,764	11,665,657	6,613
TOTALS	1,063	10,613	2,875	13,488	73,024,635	5,414

APPENDIX B
SPECIAL TANK TRAILER EQUIPMENT
 (For Hire)
L.P.G.
SPEC. MC 330

PRESSURE TYPE UNITS

	<u>100 lbs. and Under</u>		<u>100 lbs. and Under 300 lbs.</u>		<u>Over 300 lbs.</u>		<u>Total Complete Units</u>	<u>Total Capacity (Gallons)</u>	<u>Average Capacity Per Unit</u>
	<u>No. Carriers Reporting</u>	<u>No. Units</u>	<u>No. Carriers Reporting</u>	<u>No. Units</u>	<u>No. Carriers Reporting</u>	<u>No. Units</u>			
PAD District No. 1	9	59	7	42	4	15	116	560,246	4,830
PAD District No. 2	7	17	13	60	1	1	78	358,491	4,596
PAD District No. 3	6	51	9	46	-	-	97	480,829	4,957
PAD District No. 4	2	4	6	24	-	-	28	146,844	5,244
PAD District No. 5	3	9	19	167	2	11	187	1,033,842	5,529
TOTALS	27	140	54	339	7	27	506	2,580,252	5,099

APPENDIX C

SPECIAL TANK TRAILER EQUIPMENT
(For Hire)

CHEMICALS

SPEC. MC 310

	<u>Sulphuric Acid Tanks</u>		<u>Muriatic Acid Tanks</u>		<u>Nitric Acid Tanks</u>		<u>Total Complete Units</u>	<u>Total Capacity (Gallons)</u>	<u>Average Capacity Per Unit</u>
	<u>No. Carriers Reporting</u>	<u>No. Units</u>	<u>No. Carriers Reporting</u>	<u>No. Units</u>	<u>No. Carriers Reporting</u>	<u>No. Units</u>			
PAD District No. 1	10	52	5	8	3	7	67	196,395	2,931
PAD District No. 2	9	53	2	4	-	-	57	209,650	3,678
PAD District No. 3	2	2	3	12	-	-	14	43,590	3,114
PAD District No. 4	3	7	-	-	-	-	7	9,099	1,300
PAD District No. 5	4	21	2	3	2	2	26	109,154	4,198
TOTALS	28	135	12	27	5	9	171	567,888	3,321

APPENDIX D

SPECIAL TANK TRAILER EQUIPMENT

(For Hire)

MISCELLANEOUS TYPES

	<u>Stainless Steel</u> <u>Spec. MC 310</u>		<u>Aluminum</u> <u>Tanks</u>		<u>Others</u>		<u>Total</u> <u>Complete</u> <u>Units</u>	<u>Total</u> <u>Capacity</u> <u>(Gallons)</u>	<u>Average</u> <u>Capacity</u> <u>Per Unit</u>
	<u>No.</u> <u>Carriers</u> <u>Reporting</u>	<u>No.</u> <u>Units</u>	<u>No.</u> <u>Carriers</u> <u>Reporting</u>	<u>No.</u> <u>Units</u>	<u>No.</u> <u>Carriers</u> <u>Reporting</u>	<u>No.</u> <u>Units</u>			
PAD District No. 1	25	179	5	31	47	402	612	2,306,972	3,770
PAD District No. 2	23	69	3	7	24	191	267	1,214,667	4,549
PAD District No. 3	10	65	2	6	12	121	192	841,121	4,381
PAD District No. 4	2	3	-	-	2	33	36	146,606	4,072
PAD District No. 5	2	23	1	14	26	237	274	1,205,917	4,401
TOTALS	62	339	11	58	111	984	1,381	5,715,283	4,139

APPENDIX E

OPERATIONSPETROLEUM TRANSPORTATION ONLY

(For Hire)

	Number of Carriers in District	Total Annual Mileage 12 Months Ending 6/1/51	Total Gallonage Hauled 12 Months Ending 6/1/51
PAD District No. 1	392	239,710,385	9,082,707,471
PAD District No. 2	331	293,771,412	11,569,574,599
PAD District No. 3	94	105,819,129	3,487,405,422
PAD District No. 4	58	53,002,595	956,653,036
PAD District No. 5	188	124,569,140	4,687,772,924
TOTALS	1,063	816,872,661	29,784,133,452

APPENDIX F

PRIVATE CARRIER

General Purpose Tank Trailers and Semi-Trailers
in Petroleum Service as of June 1, 1951

	<u>No. of Units June 1, 1951</u>	<u>Average Capacity (Gallons)</u>	<u>Total Capacity (Gallons)</u>
<u>DISTRICT I</u>			
Semi-Trailers	3,774	4,701	17,741,000
<u>DISTRICT II</u>			
Semi-Trailers	3,386	5,017	16,988,000
<u>DISTRICT III</u>			
Semi-Trailers	1,201	4,642	5,575,000
<u>DISTRICT IV</u>			
Semi-Trailers	196	5,940	1,164,000
<u>DISTRICT V</u>			
Semi-Trailers	<u>1,108</u>	<u>5,854</u>	<u>6,486,000</u>
Total Trailers and Semi-Trailers	9,665	4,961	47,954,000

APPENDIX G

TANK TRAILER AND SEMI-TRAILER
OPERATED BY THE CHEMICAL INDUSTRY

1. General Purpose Equipment

	<u>Number</u>	<u>Total Capacity (Water Gallons)</u>
1. Straight (complete) units operated	139	187,100
2. Units operated as tractor- semi trailers	77	196,572
3. Units operated as trains (2 tanks)	<u>2</u>	<u>9,000</u>
<u>Totals</u>	218	392,672

2. Special Equipment

	<u>Number</u>	<u>Total Capacity (Water Gallons)</u>
1. Sulfuric Acid Tanks ICC Specs. MC 310	72	138,482
2. Muriatic Acid Tanks ICC Specs. MC 310	14	32,853
3. Nitric Acid Tanks ICC Specs. MC 310	8	6,150
4. Stainless Steel Tanks ICC Specs. MC 300	20	52,977
5. Aluminum Tanks	2	5,000
6. Others - specify:		
Heresite Lined	4	18,000
Nickel	3	6,186
Rubber Lined	10	23,912
Not Described	<u>30</u>	<u>78,970</u>
<u>Totals</u>	163	362,530

APPENDIX H

TOTAL CENSUS - PRIVATE AND FOR HIRE

General Purpose Tank Trailers and Semi-Trailers

(Does not include LPG, chemical or other
type trailers. See Appendices "B", "C",
"D" and "G")

The following table shows the combination of the private and for-hire general purpose tank trailer and semi-trailer fleets arranged by Petroleum Administration for Defense Districts.

	<u>No. of Units</u> <u>June 1, 1951</u>	<u>Average</u> <u>Capacity</u> <u>(Gallons)</u>	<u>Total</u> <u>Capacity</u> <u>(Gallons)</u>
<u>DISTRICT I</u>			
Private Carrier	3,774	4,701	17,741,000
For-Hire Carrier	4,957	4,707	23,333,257
Total	<u>8,731</u>	<u>4,704</u>	<u>41,074,257</u>
<u>DISTRICT II</u>			
Private Carrier	3,386	5,017	16,988,000
For-Hire Carrier	4,409	5,752	25,362,124
Total	<u>7,795</u>	<u>5,433</u>	<u>42,350,124</u>
<u>DISTRICT III</u>			
Private Carrier	1,201	4,642	5,575,000
For-Hire Carrier	1,611	4,947	7,959,223
Total	<u>2,812</u>	<u>4,817</u>	<u>13,544,223</u>
<u>DISTRICT IV</u>			
Private Carrier	196	5,939	1,164,000
For-Hire Carrier	747	6,284	4,694,374
Total	<u>943</u>	<u>6,212</u>	<u>5,858,374</u>
<u>DISTRICT V</u>			
Private Carrier	1,108	5,854	6,486,000
For-Hire Carrier	1,764	6,613	11,665,657
Total	<u>2,872</u>	<u>6,320</u>	<u>18,151,657</u>
U.S. Total for Private Carrier	9,665	4,962	47,954,000
U.S. Total for For-Hire Carrier	<u>13,488</u>	<u>5,414</u>	<u>73,024,635</u>
U.S. Grand Totals	23,153	5,225	120,978,635

UNITED STATES
DEPARTMENT OF THE INTERIOR
OIL AND GAS DIVISION
Washington 25, D. C.

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May 8, 1951

Mr. Walter S. Hallanan, Chairman
National Petroleum Council
1625 K Street, N. W.
Washington, D. C.

Dear Mr. Hallanan:

No complete census of tank trucks used in the petroleum industry has been taken since 1944. There has been a large increase in the number and use of tank trucks since the census, and it is highly important in a proper analysis of transportation capacity that the Government have up-to-date and adequate information.

Tank trucks used in the petroleum industry fall into three categories as to ownership:

1. Private
2. Contract carrier
3. Common carrier

As to use:

1. Clean oil
2. Heavy oil
3. Liquefied petroleum gas (pressure tanks)
4. Chemicals

The National Petroleum Council could not attempt to make a complete census of all trucks in all of the above categories. However, the Council probably would be the best source of information on some of the categories.

Therefore, it is requested that the Council consider this matter and appoint a committee to undertake the census of that portion of the tank truck problem which it could properly handle.

Sincerely yours,

/s/ H. A. Stewart

H. A. Stewart
Acting Director