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(Information)

COMMISSION

GENERAL COAL MARKET SITUATION 1975 AND FORECASTS FOR 1976

I. SUMMARY SURVEY

1. THE COAL MARKET IN 1975

In common with most other economic activity in the Community, the coal industry passed through a difficult period of low demand in 1975.

In this respect, coal (excluding lignite) has fared similarly to oil. Percentage-wise, both have reduced their contribution to the Community's primary energy requirements from a total of slightly over 77% (oil 56·6%, coal 20·7%) in 1974 to approximately 74% (oil 54·5%, coal 19·8%) in 1975 (Table 1).

As some of the reasons for this shift are transitory, the trend is unlikely to continue beyond 1976 and might be reversed again in the case of a vigorous economic revival leading to a resurgence of demand for energy. However, deliberate policies of promoting the use of coal for electricity generation may be required to ensure that strong economic recovery does not entail an undesirable increase in dependence on imported oil.

In 1975, coal consumption slumped to 255 mtce (million metric tons coal equivalent), compared to 272 mtce in 1974.

Coal carbonized by cokeries dropped by only about 3 mtce against the previous year to around 105 mtce in 1975. Power stations consumed around 100 mtce, likewise a drop of some 3 mtce against 1974, while other markets and exports to third countries absorbed around 50 mtce, about 11 mtce less than the year before.

However, the modest statistical drop in consumption by the two main markets for coal in the Community does not fully reflect the underlying situation.

In the first place, metallurgical coke production, primarily in Germany, has substantially exceeded demand, with the result that large quantities of coke have had to be put to stock. Secondly, the recovery of coal consumption by power stations in the UK from its abnormally low level in 1974, due to the strike in the British coal industry that year, masks the severity of the reduction in coal-burn in German power stations of some 27% compared to 1974.

Community coal production in 1975 was about 237 mtce, an increase of 13 mtce over the

previous year. This increase is accounted for by the recovery of production in the UK from the low level caused by the coal strike early in 1974 — all other Community countries showed a slight drop from the previous year's output.

The decrease in production has been primarily due to a drop in output per manshift in all member countries except in the UK where the previous year's figures have been distorted by the coal strike. Furthermore, German production was depressed by some short-time working towards the end of 1975.

The impact of wage increases, lowered productivity and rises in costs of materials raised production costs in the course of 1975 by 16 to 33% in the Community coal producer countries. This represents a slight slowing down in cost escalation compared to the previous year.

Coal imports from third countries were around 40 million metric tons in 1975, an increase of some two million metric tons over the previous year.

During the first half of 1975, coal industry receipts rose faster than costs but this was reversed during the second half, partly due to the costs of carrying rising stocks. The buoyant revenue situation was due to many Community coals retaining their competitive position even after price rises ranging from about 4·5% for German coking coals to 30% in the UK during the reference period 15 January 1975 to 15 January 1976.

In spite of the world recession in the steel industry, there have been no reductions in contract prices for good quality coking coal on the world market. As a result, prices cif ARA for comparable qualities were above those of German coking coal at the rate of about DM 2·60 = $ 1 ruling at the end of 1975. Although world market contract prices for steam coals have eased, most UK coals have remained competitive on the home market, both with third country steam coals and with heavy fuel oil.

With production at 237 mtce and imports at 40 mtce, total quantities of coal available, excluding stocks carried over, were 277 mtce in 1975 compared to consumption of about 255 mtce and exports to third countries amounting to some 2 mtce, a total of 257 mtce. Accordingly, availabilities excluding stocks exceeded consumption by somewhere around 20 mtce. In addition, coke production exceeded consumption by some nine million metric tons.

As a result, there have been substantial build-ups of coal stocks at collieries and power stations, the latter mainly in the UK, and of coke at German cokeries.

2. COAL MARKET OUTLOOK FOR 1976

Prospects for coal for 1976 are extremely difficult to forecast, depending both on general industrial revival to stimulate demand for electricity and on an upturn in the steel industry to raise coking coal and coke consumption.

Current estimates are that coke consumption by the Community steel industry will be around 58 million metric tons, representing about 75 mtce of coal, an 11% increase over 1975. This will be spread over all Community countries but, percentage-wise, will range from about 5% to close on 18% for individual members.

Coal consumption for electricity generation is expected to be about 107 mtce compared to 100 mtce last year. After the steep decline in Germany in 1974, that country will register the largest increase, followed by the UK and France.

Other coal consuming sectors are likely to require some 50 mtce, about the same as in 1975, with domestic heating representing about 45% of this market. Coke production, other than for the steel industry, and for export to third countries and some further stocking will absorb a further 27 mtce and coal exports to third countries around 2 mtce.

Total Community coal production is expected to remain at about 237 mtce, the same as last year. However, there will be some shift as between member countries with short-time working reducing German output by some 2·5 mtce and an increase of about 2 mtce in the UK and 0·5 mtce in France.

After a time-lag experienced in 1975, coal imports from third countries will be moving in the direction of adjusting themselves to market conditions, and are likely to drop to around 35 to 36 million metric tons, distributed as to countries of origin in about the same proportion as last year. As regards countries of destination, the reduction will be spread over all Community countries except Italy and the Netherlands where slightly increased imports are expected.

With production and imports totalling around 273 mtce as against consumption and exports of about 261 mtce, the overall picture for 1976 is one of production and imports again exceeding demand, though to a lesser extent than in 1975. As a result, a further rise in coal and coke stocks of the order of 12 to 13 mtce is likely, the main increase in coal stocks taking place in the UK and in coke stocks in Germany.

II. GENERAL ECONOMIC SITUATION AND OUTLOOK

(Table 2)

After continuing recession during the greater part of the year, economic activity in the Community has been showing signs of revival since the autumn of 1975. Production has risen in several sectors, such as the automotive industry, where output of cars and commercial vehicles in September and October substantially exceeded the level of the same period a year earlier.

External demand has, likewise, shown a tendency towards expansion during the final months of 1975, partly, no doubt, due to the economic revival in the US and Japan since the spring of 1975. In the US, in particular, the gross national product rose by volume during the third quarter of 1975 at a rate equivalent to an annual increase of 12%, and equivalent to an annual increase of 5·4% during the fourth quarter.

In the Community, the run-down of stocks has slackened and, for some products, these are virtually exhausted. As a result, a rise in demand in these sectors must quickly translate itself into a higher level of production.

Furthermore, governmental actions to revive the economy are beginning to show their effects. For example, the impetus provided by public works programmes is, in some measure, successful in counteracting the continued stagnation in the building industry.

On the other hand, private sector investment has remained low. In 1975, the level of investment in real terms was 6% lower than during the previous year, largely explicable by the amplitude of existing under-used capacity in all member countries.

The more hopeful signs discernible at the end of 1975 suggest that gross internal product in the Community which had diminished in volume by 2·5% that year, is likely to rise by more than 3% in 1976. This improvement is likely to be most marked in Germany, France and Denmark, whereas particularly slow growth must be expected in the UK, due to a variety of factors reflected by that country's continuing severe inflation and imbalance on external account.

III. COAL DEMAND BY SECTORS

(Table 3)

1. STEEL INDUSTRY AND OTHER COKE USERS

(Tables 4 to 7)

1975 witnessed the sharpest recession in the steel industry in 30 years, both in the Community and worldwide.

The downward trend of the autumn of 1974 accelerated in the course of 1975: averaged across the Community, raw steel and pig iron production in 1975 were each some 20% below the level of the previous year (Table 4). The strongly export-orientated steel industry of Belgium and Luxembourg was particularly severely affected by the recession and suffered a drop in production of some 30%.

Predictions regarding the effects of the current nascent economic revival in the steel industry require the utmost caution. The presently rising demand for durable consumer goods should have a favourable effect, but, on the other hand, the market for heavy and medium sheets is likely to remain weak due to the continuing depression in shipping and ship-building.

Forecasts are that raw steel production, rising since the autumn of 1975, will continue to rise during 1976. Figures in this document are based on the assumption that in the Community as a whole, steel production will be 11% above last year and reach about 138 million metric tons, about the same level as in 1972. The increase in pig iron production is estimated at around 12% to reach 100 million metric tons — this larger percentage rise is mainly due to a slight shift by the Italian steel industry from scrap to pig iron.

Specific coke consumption in blast furnaces has dropped in nearly all Community countries in 1975 (Table 5), favoured by a decrease in the price of fuel oil for injection into blast furnaces. This development can be expected to continue in 1976, though in attenuated form, leading to an average of 519 kg per metric ton of pig iron in the Community.

The decrease in pig iron production and specific coke consumption by the Community steel industry in 1975 led to a reduction in coke consumption of some 23% or 15 million metric tons (Table 6). The drop was greatest in Belgium, Luxembourg and Germany where it was of the order of 30%.

The above hypotheses regarding production levels and specific coke consumption for 1976 result in estimated total coke consumption by the Community steel industry of some 58 million metric tons. This represents an increase of 11% or close on six million metric tons over 1975 spread over all Community countries.

Like the steel industry, the other markets for coke also contracted substantially in 1975 as against the previous year (Table 7). However, unlike in the case of the steel industry, no recovery can be foreseen for 1976 and there may be a further contraction of the domestic market unless there is a reversal of the recent succession of mild winters.

2. POWER STATIONS

(Table 8)

For the first time in a quarter of a century, 1975 has witnessed a decline in absolute terms in electricity consumption in some member countries and, in the remainder, the rise has been far below the previous average annual rate of 6 to 7%.

The degree to which this development is due to the economic recession or to deliberate measures designed to economize energy cannot be established with precision. However, it is likely that the recession has played by far the larger part as the main drop in demand for electricity has been by industry.

Total coal consumption by power stations in the Community was around 100 mtce in 1975, a reduction of about 3 mtce from the previous year. However, when account has been taken of the fact that, due to the coal strike, power station coal-burn in the UK was abnormally low in 1974, a much more serious situation emerges than is suggested by a decrease of some 3% for the Community as a whole. Apart from the special case of the UK, there have been no significant changes in coal-burn in the Community except in Germany, where it decreased by over 9 mtce from 34 mtce in 1974 to 25 mtce in 1975, a drop of close on 27%.

The exceptional development in the German electricity generating industry in 1975, despite legislation designed to support average annual coal-burn in power stations at around 30 to 33 mtce, has been due to a combination of the following factors:

— a larger drop in electricity demand than the average for the Community as a whole;

— the maintenance of lignite-burn in the face of falling overall demand for electricity;

— the entry into operation of two new nuclear stations, representing a total of 1950 MW;

— the entry into operation of new gas-fired capacity stations representing 2213 MW and the existence of contracts for natural gas available at very attractive prices.

In 1976, electricity demand will probably increase by some 2·5 to 5% over 1975. However, coal-burn for electricity generation is likely to rise by some 7% to about 107 mtce, its highest level since 1973. But this improvement must be set against the abnormally low coal-burn in the UK in 1974 due to the coal strike and in Germany in 1975 due to the factors mentioned above.

As a result of measures taken by the government, the increase will be largest by far in Germany, amounting to about 5 mtce, followed by 1 mtce in the UK and 0·5 mtce in France. In addition, there may be increases in some other member countries not yet definitely known and not included in the 107 mtce. Furthermore, German power stations have agreed to accept 2 mtce in 1976 for stocking.

In 1975, lignite consumption by power stations, mostly in the Cologne/Aachen area of Germany, was about 32 mtce, about the same as in 1974. The situation is expected to be similar in 1976, but if a revival in electricity demand should warrant it, lignite production for power stations could be raised to between 34 and 35 mtce.

During the latter part of 1974 and in 1975, the Council passed a series of resolutions to the effect that the Community's dependence on imported energy should be reduced and that its sources of imported primary energy should be diversified. Increased use of coal for electricity generation is an important element in the attainment of these objectives.

Considering that the increased coal-burn expected in 1976 represents no more than a reversion to the 1972 position and is due largely to short-term measures by member governments, the current picture gives grounds for serious concern. The uncertainties of the primary energy market affecting both coal and heavy fuel oil discourage investment in modernization, conversion to solid fuels and construction of new coal-fired capacity which is likely to be required in the 1980s.

Both the electricity generating and the coal mining industry need an energy policy framework within which to formulate their plans.

3. VARIOUS INDUSTRIES

(Table 9)

Outside the steel industry and electricity generation, the industrial use of coal and coke is confined to a small sector. It has some importance in the UK, in Germany and France, but is very small in the other member countries.

Total consumption of coal and coke by this sector was slightly more than 18 million metric tons in 1975, a drop of over 20% compared to 1974. With general economic revival in 1976, consumption will probably rise to somewhere between 19 and 20 million metric tons.

The domestic market for solid fuels has shrunk from 48 mtce in 1974 to about 41 mtce in 1975, and indications suggest that the market will contract by some 1 to 2 mtce to around 39 mtce in 1976, about 22·5 mtce of which will be coal.

4. DOMESTIC

(Table 10)

In spite of the developments in the oil market triggered off by the war in the Middle East in the autumn of 1973, the contraction of the domestic market for coal, coke and lignite briquettes continued in 1974 at a rate of 9% and accelerated to 15% in 1975, due partly to mild winters, and partly to some running down of distributed stocks built up in 1974. More permanent reasons for this decline have been the increasing availability of cleaner and more convenient forms of heating, by oil, electricity and, latterly, natural gas, and perhaps, to a slight extent, official encouragement of economy measures and better insulation of premises.

Developments in the UK have followed closely similar percentage trends as in the Community as a whole. The strike in the coal industry early in 1974 does not appear greatly to have affected the picture, probably due to stocks held by merchants and consumers, with the result that the comparison between 1974 and 1975 in the statistical table requires no special comment.

5. EXPORTS TO THIRD COUNTRIES

Coal exports to third countries, which had reached their lowest point in 1973 at less than one million metric tons, have since 1974 been in the region of two million metric tons per annum. The increase is primarily due to coking coal deliveries from the Ruhr to the US and Japanese steel industries.

Exports of coke to third countries, which had been fluctuating between 2·5 and four million metric tons per annum since 1960, rose to 6·3 million metric tons in 1974, primarily as a result of exceptional exports of 2·5 million metric tons of coke from the Ruhr to the United States. However, due to the world-wide reduction in the level of activity by the steel industry, these coke exports to non-European countries have been contracting since the beginning of 1975.

The Community's coke exports to third countries are thus once again concentrated on neighbouring European countries. They amounted to around 3·5 million metric tons in 1975, their average during the years 1960 to 1973, and are likely to remain at about the same level in 1976.

IV. COMMUNITY COAL PRODUCTION

1. PRODUCTION STATISTICS

Except for most of German production, the producer countries' statistics generally show coal output on a metric tons by weight basis (t = t) and not on a calorific value basis (tce). To allow comparisons with statistics published in the producer countries, production figures are, therefore, given in t = t, with their tce equivalent, when necessary.

(a) **Quantitative analysis of output** (Tables 11 and 12)

Community coal production in 1975 was about 257 million metric tons (237 mtce) an increase of 15 million metric tons or approximately 6% over 1974.

Statistically, the development of UK coal production in 1975 was different from that in the other member countries. Due to the coal strike in 1974, UK output that year had been exceptionally low at 109 million metric tons. With normal working throughout 1975, production recovered to 127 million metric tons, an increase of 18 million metric tons or approximately 16·5%, but this was still below output in 1973.

Coal production in Germany, France and Belgium dropped by a total of 3·2 million metric tons and a further decrease of 0·8 million metric tons is accounted for by the closure of the last pit in the Netherlands at the beginning of 1975. Accordingly, production in these four countries fell by a total of four million metric tons compared to 1974.

Taking account of the fact that in spite of some recovery of UK output from its low level the year before it had not reached its 1973 volume, the year 1975 must be described as characterized by a slight tendency to falling output by the coal industries of all member countries.

Current estimates of Community coal output for 1976 are that this will be of the same order of magnitude as in 1975, with slight increases in the UK and France, a small decrease in Germany resulting from short-time working and no change in Belgium.

(b) **Manpower and Productivity** (Tables 13 and 14)

The recruitment by the Community coal industries initiated in 1974 was continued into 1975 but has largely ceased in Germany and Belgium since the middle of the year.

The result, after allowing for natural wastage, has been a slight net increase in underground manpower in the Community in 1975 over 1974, particularly in the UK. Although this newly recruited manpower consisted in part of former miners, their training appears to have been a contributory cause of the fall in output per manshift throughout the Community's coal industries in 1975 compared to the previous year, ranging from 1·4% in France to 6·7% in Belgium.

In the case of the UK, the output per manshift figure for the whole year of 1974 has been distorted by the coal strike in February of that year and its aftermath. The monthly figures after May show a drop in productivity in 1975 as against 1974, comparable to that in the other Community coal industries.

Another cause for the fall in productivity has been the intensification of development work in pits, designed to increase their life or productive capacity beyond what had been previously planned. In this connection, the tendency to work less satisfactory coal faces during periods of high coal prices with a view to extending the reserves and hence the life of the pit also results in lower productivity.

On the other hand, major development work has only limited effects on coal mining productivity statistics for Belgium, Germany and the United Kingdom, as a large part of this work is generally undertaken by contractors with their own labour, whereas French statistics incorporate this element.

1976 is expected to see divergent trends in output per manshift. There is likely to be a further slight drop in Germany, a rise in the UK of about 3% and a larger rise in Belgium and France. The explanation for the large increases lies in further steps towards concentrating output in the more productive coalfields in the last two countries, including spurts in productivity usual before pits are closed, resulting from the concentration of manpower on current production.

2. FINANCIAL DEVELOPMENTS

(a) **Production costs and trading receipts** (Table 15)

Costs of production have risen substantially in 1975, due to wage increases of the order of 7 to 15% and to rises in the cost of materials. The

effects of these increases have been magnified by the drop in productivity described in the previous section.

The impact of these factors has raised production costs in the course of 1975 by 16% in Germany, by around 25% in Belgium and France and by 33% in the UK. For Germany and the UK, this represents a slowing down in cost escalation compared to 1974, when it was of the order of 24 and 43% respectively.

On the other hand, receipts in 1975 rose at a faster rate than costs, increasing by 21% in Germany, 29% in France and approximately 47% in Belgium and the UK. This has been the second consecutive year of revenues rising by percentages of this order of magnitude, except in the case of France where these had risen by some 54% in 1974. The reason for these buoyant revenues have been the price rises mentioned in Chapter V.

As a result of the growth of receipts outstripping rises in costs, there was an improvement in the financial position of the coal industry in all Community countries. Nevertheless, not all enterprises have been able to operate profitably.

The relationship of revenues to costs of production is most satisfactory in the UK coal industry averaged over the country as a whole, though there are wide regional differences in this respect. On the other hand, in spite of high world market prices for coking coals, problems of cash flow and costs arising from growing stocks of coal and coke have been increasing burdens on the financial position of the German coal industry in the course of 1975.

(b) **Financial interventions by Member States** (Table 16)

The improvement in the revenue/cost ratio of the Community coal industry mentioned above has allowed a further reduction in subsidies in 1975, thus continuing the previous year's reversal of a long-standing trend.

In this connection, it is of particular interest that whereas 79% of subsidies had to be devoted to meeting operating losses in 1973, only 38% were required for this purpose in 1975 — the remaining 62% were allocated to investment and to meeting continuing outgoings resulting from operations in the past.

3. DEVELOPMENTS IN PRODUCTIVE CAPACITY

(a) **Investment** (Table 17)

The investment plans by the Community's coal industries formulated in 1974 and described in the Commission's Report on the General Coal Market Situation for that year (OJ No C 116) are reflected in investments in productive capacity amounting to more than 500 million u.a. in 1975, compared to 324 million u.a. the previous year.

The rise in investment has been largest in Germany, followed by the UK, due primarily to the need to make up arrears in Germany where investment per ton of production during the previous years had been substantially lower. Investment has been largely concentrated in the Community's best coalfields such as in the Ruhr, in Lorraine and in the Midlands and Yorkshire coalfields in the UK.

Investment for 1976 is provisionally planned to be of the order of more than 500 million u.a., involving further rises in the UK and France, stabilization in Germany and a reduction in Belgium. However, of this total, around more than 100 million u.a. are still subject to final decisions.

(b) **Pit closures** (Table 18)

The fall in demand for coal in 1975 has been viewed by the Community's coal industries as a temporary, essentially cyclical, phenomenon. Accordingly, such adjustments to falling demand as have been made, have been of a temporary character such as short-time working.

There have been no pit closures in 1975 designed to adjust output to the market situation that year. The eight closures which have taken place have been for technical rationalization.

V. COAL PRICES

1. COAL PRICE DEVELOPMENTS

(Tables 19 and 20)

Prices of Community coals have risen in 1975, though at a slower rate than in 1974.

Tables 19 and 20 show price movements of selective comparable qualities of coal in various Community coalfields from January 1975 to January 1976, the first in national currencies and the second in dollars. In some cases, price rises in national currencies have been more than compensated by movements in the rate of exchange leading to price reductions in dollar terms. As percentages, the former have differed widely between various coalfields and types of coal.

There have been no price increases in Belgium and for French coking coal. Saar and Ruhr coking coal rose by 4·3 and 4·7% respectively, Lorraine steam coal by 17·4%, French Nord anthracite by 20% and UK steam and coking coals by about 30%. However, in spite of the large increase in UK prices in terms of sterling, these have (in terms of dollars) remained far below those of other community producers for comparable qualities, particularly as regards steam coal, but the differential has been narrowing compared to 1974.

2. COKING COAL

The medium price cif ARA for standard coking coal calculated by the Commission rose from $ 56·75 per metric ton in October 1974 to $ 63·80 in October 1975. This 12% increase compares to a doubling of prices during the same period 12 months earlier.

At current prices, a large part of Community coking coal production is competitive with third country coal imported under long-term contracts, at least in areas not too far from the point of production.

3. STEAM COAL

The slowing down in industrial activity has resulted on the one hand in a general drop in demand for primary energy and, on the other, in a surplus of heavy fuel oil and gas available at low prices. While this situation has led to a drop in coal sales it has so far exercised little or no influence on prices. Nevertheless, UK steam coal has remained competitive with heavy fuel oil.

However, this is not so in Germany where prices covering costs of production can be secured from electricity producers only through a surcharge on electricity tariffs destined to feed an equalization fund covering the difference between the cost of coal and that of other forms of primary energy. In France and Belgium, prices of indigenous coal are aligned on the prices of imported energy with a time lag of some months to a year; the alignment price in 1975 was of the order of $ 50 per tce. Losses resulting from sale prices below costs of production are at least partly made up through subsidies.

4. DOMESTIC SOLID FUELS

Price developments in this sector have been affected by the ready availability of alternative sources of energy at relatively low prices, particularly gas. Furthermore, as the cost of heating figures in official cost of living indices with important secondary effects, governments have tended to use their powers to keep down price increases in this sector.

5. OUTLOOK FOR 1976

Rising costs are leading the Community coal industry to attempt to raise prices although the market situation points in the opposite direction. The outcome will probably be some further rises, but these are likely to be moderate.

VI. COKE

1. DEVELOPMENT OF COKING CAPACITY

(Table 21)

The strong cyclical fluctuations in demand for metallurgical coke do not appear to have adversely affected investment in new coking capacity which stood at 90 million metric tons of coke per annum in 1974, at 91·5 million metric tons in 1975 and will reach 94 million metric tons in 1976.

This increase in capacity has resulted primarily from the construction of new cokeries on the sites of steel works in Germany, Italy and France, mainly on the coast. The steel industry is thereby raising its share of total coking capacity in the Community to about 50%.

2. COKE PRODUCTION AND COAL SUPPLIES TO COKERIES

(Tables 22 and 23)

Coke production has followed cyclical variations in demand to only a limited extend, adjustments having been largely through changes in coke stocks. Averaged over the Community, the reduction in demand for coke of some 18 million metric tons (− 21·4%) in 1975 was reflected in a fall in coke production of only 3·7 million metric tons (− 4·5%) to about 79 million metric tons, and involving a drop in the utilization of coking capacity from 92% to 86%.

The drop in production in 1975 has brought with it a reversal towards the pre-1974 pattern of coal supplies. During the steel industry boom in 1974, additional demand for coal by cokeries in the Community was met in two ways: through running down German coal stocks, and above all, through increased third country imports of coking coal. In 1975, both intra-Community deliveries and third country imports returned to their 1973 levels.

The reversal has been particularly marked in Belgium, the steel industry of which has been the most severely affected by the recession, resulting in a drop in coke production of over 28%. Two-thirds of the fall in intra-Community coal deliveries in 1975 apply to Belgium, and 80% of the drop in imports of coking coal from third countries. Italy, the largest coking coal importer in the Community, reduced its receipts of Community and third country coal in about equal proportions, while the drop in demand in France has largely been to the detriment of the French coal industry.

Production of coke in 1976 is likely to be around 77 million metric tons, slightly above expected demand including exports to third countries.

VII. TRADE IN COAL AND COKE

1. INTRA-COMMUNITY TRADE

(Tables 24 and 25)

Coal trade within the Community is primarily a matter of deliveries of German coking coal and coke for use by the French, Italian, Netherlands, Belgian, and Luxembourg steel industries, with total quantities fluctuating between 15 and 25 million metric tons. Quantities in the two to three million metric tons bracket are also delivered to other Community countries by the UK, mainly to power stations on the north German coast and for miscellaneous purposes to France, Belgium and the Netherlands.

As the German coal industry has large coke production and storage facilities, about one-third of German deliveries to other Community countries tend to be in the form of blast furnace

coke. These deliveries, and the stocks from which a substantial proportion were drawn, were, of the greatest importance to the steel industries of the abovementioned member countries during the boom year of 1974.

With the serious recession in the Community steel industries in 1975, deliveries of German coking coal and, particularly, of coke slumped heavily. German coke deliveries to other Community countries were some 40% lower in 1975 than the year before, while the drop in coal deliveries amounted to about 15% for all types.

Total trade within the Community was around 24·5 million metric tons in 1975, represented by some 17·8 million metric tons of coal and 6·7 million metric tons of coke. Estimates for 1976 are similar with, probably, some rise in the proportion of coke.

2. IMPORTS FROM THIRD COUNTRIES

(Tables 26 and 27)

In spite of the recession in 1975, coal imports from third countries into the Community showed a slight rise against the previous year. The explanation lies mainly in the time lag between the conclusion of contracts and their execution — unlike coal imports which adjusted themselves fairly rapidly to reduced requirements, imports of coal for power stations were higher in 1975 than in 1974 in spite of falling demand. This situation arose from contracts for power station coal concluded under the joint impact of the oil crisis and labour problems in parts of the Community's coal industry.

1976 will see a reversal of the rising import trend registered during the past two years. While in 1973, third country imports amounted to about 30 million metric tons, they rose to 38 million metric tons by 1974, reaching about 40 million metric tons in 1975 and are likely to drop to around 35 to 36 million metric tons in 1976.

Allowing for a one year delay, total imports of coal from third countries are dropping by about the same percentage as total Community coal and coke consumption. The latter was about 11% lower in 1975 than it had been in 1974 and imports will be about 11% lower in 1976 than they were the previous year.

About 70% of the Community's coal imports come from Poland and the US, the former providing slightly the larger quantities since 1973. During this same period, imports from Australia and South Africa have been acquiring growing importance. No significant changes in the proportions of coal supplied to the Community by various third countries are expected in 1976, but the share of power station coal is likely to drop.

Though less so than the previous year, world market coking coal prices continued their upward trend in 1975. Nearly all world market suppliers, including state trading countries, have closely followed the price trends of US coal, the market leader, as they tended to do late in 1973 and in 1974 regardless of existing long-term contracts.

VIII. COAL AND COKE STOCKS

(Table 28)

Stocks are a vital link in the chain between coal producers and consumers. They provide an essential element of flexibility, the great value of which has been demonstrated during each peak of economic activity, most recently in 1974.

Coal production is characterized by unusual inflexibility, whereas one of the industry's two main customers, the steel industry, is subject to wide swings in the level of activity. There are no comparable fluctuations in consumption by coal's other large customer, the electricity generating industry. Up to the end of 1974, varying levels of economic activity have been reflected in electricity demand to only a slight extent, and substitution by alternative fuels has been the main influence on the market for coal in this industry. Nevertheless, both markets are subject to cyclical fluctuations which give rise to questions regarding the distribution of the financial burdens of carrying stocks above operational requirements.

Unprecedented slow growth and, in some instances, actual contraction of demand for electricity in 1975, combined with substitution by other fuels described in the section on 'Coal sales to power stations' (III.2.) have led to shrinkage in demand for power station coal, particularly in Germany, which greatly exceeded forecasts. This, and the extremely severe downturn in the Community's steel industry, have led to a rapid rise in producers' stocks of coal and coke in the Community in 1975 to about $2^1/_2$ times their level at the end of 1974.

Coal and coke stocks have repeatedly shown their value as a flexibility factor when economic activity was at a high level, but they raise the following problems:

— negative influences on cash flow,

— financial charges,

— availability of stocking sites,

— costs of double handling,

— degradation due to weathering,

— psychological,

— environmental.

The problem of stocking sites is closely linked to that of the costs of double handling. To avoid the latter, it is highly desirable for stocks to be kept on the producer's, processor's or ultimate user's site rather than on special stocking sites. However, so long as the financial burden of stocking falls on the party keeping the stocks, all parties show natural resistance to maintaining stocks above the level needed to meet their operating requirements. Furthermore, large pithead stocks of coal or coke have a depressing psychological effect on the labour force in the coal mining industry—regardless of technical or financial considerations it is, therefore, undesirable for these to grow to levels giving rise to anxieties for the security of employment.

Various arrangements were introduced in 1975 or are being put into operation to encourage consumers to accept stocks above the level of their operational requirements. In the UK, such a scheme operates through excess stocks currently estimated at around 3·5 million metric tons having been accepted by power stations but not requiring payment until used, while the German electricity generating industry has agreed to accept and pay for two million metric tons in 1976 for stocking in excess of expected requirements.

In addition to such arrangements designed to induce consumers to stock above their operational requirements, the German government is introducing measures to finance up to 10 million metric tons of stocks of coal or coke as a federal reserve.

A high proportion of German stocks is kept in the form of blast furnace coke. The reason is that carbonization and the production of associated by-products is traditionally linked to the activities of the coal rather than the steel industry, with the incidental advantage that coke stocks are less liable to deteriorate through weathering than coal.

Stock movements in 1976 are likely to differ substantially from those in 1975.

Whereas coke producers' stocks, mainly in Germany, rose from four million metric tons at the end of 1974 to over 13 million metric tons a year later, they are expected to rise by only about a further three million metric tons in the course of 1976. This increase is likely to be confined entirely to Germany.

Producers' coal stocks, on the other hand, rose by 13 million metric tons during 1975, represented largely by rises of five million metric tons each in Germany and the UK and of some two million metric tons in France, to stand at a total of close on 24 million metric tons at the end of the year. For 1976, no further large increases in producers' coal stocks are to be expected except in the UK where these might grow by a further eight million metric tons.

As a result, producers' stocks of coal in the Community will probably stand at around 32 million metric tons at the end of 1976 and of coke at about 16 million metric tons.

The Commission is currently engaged in the formulation of proposals for assistance from Community funds towards the costs of producers' coal and coke stocks. Subject to agreement by the Council, the Commission intends to bring these measures into operation as soon as possible.

TABLE 1

Shares of the various forms of primary energy in gross internal energy consumption in %

1974	Coal and equivalent	Brown coal and equivalent	Oil and equivalent	Natural gas	Primary electricity	Other fuels	Total
Belgium	28·3	—	52·7	18·9	—	0·1	100·0
Denmark	10·6	—	89·4	—	—	—	100·0
Federal Republic of Germany	23·0	9·7	51·3	12·7	3·0	0·3	100·0
France	16·0	0·6	66·1	8·2	9·1	—	100·0
Ireland	8·9	16·0	72·3	—	2·8	—	100·0
Italy	6·7	0·3	72·7	12·4	7·7	0·2	100·0
Luxembourg	50·2	0·4	27·0	5·5	16·9	—	100·0
Netherlands	4·8	—	42·7	51·8	0·7	—	100·0
United Kingdom	33·5	—	47·8	14·3	4·4	—	100·0
Community	20·7	3·0	56·6	14·7	4·9	0·1	100·0
1975 [1]							
Belgium	23·9	—	52·8	19·9	3·4	—	100·0
Denmark	12·3	—	87·2	—	0·5	—	100·0
Federal Republic of Germany	19·4	10·0	51·5	14·1	4·7	0·3	100·0
France	15·8	0·4	63·5	9·5	10·8	—	100·0
Ireland	7·5	16·4	73·1	—	3·0	—	100·0
Italy	6·5	0·2	69·3	15·0	9·0	0·2	100·0
Luxembourg	42·6	—	31·9	8·5	17·0	—	100·0
Netherlands	4·1	—	39·2	55·5	1·2	—	100·0
United Kingdom	36·1	—	43·9	15·5	4·5	—	100·0
Community	19·9	3·1	54·7	16·2	6·0	0·1	100·0

[1] Percentages based on provisional figures rounded off to 100000.

TABLE 2

A. Gross domestic product in terms of volume

(% variation compared with previous year)

	1974	1975	1976
Belgium	3·9	− 2·5	2·1
Denmark	1·6	− 1·2	4·0
Federal Republic of Germany	0·6	− 3·6	4·0
France	3·8	− 2·1	4·1
Ireland	0·4	− 3·6	2·5
Italy	3·4	− 3·3	2·0
Luxembourg	3·5	− 7·7	2·1
Netherlands	2·8	− 1·7	2·6
United Kingdom	0·7	− 1·4	1·8
Community	2·0	− 2·6	3·2

B. Trend of industrial production

(% variation compared with the previous year)

	1974	1975	1976
Belgium	4·3	− 10·0	4·5
Denmark	− 0·4	− 6·0	4·5
Federal Republic of Germany	− 0·9	− 6·5	5·0
France	2·5	− 8·6	4·6
Ireland	2·5	− 8·7	2·0
Italy	3·5	− 10·0	2·0
Luxembourg	3·5	− 22·0	8·0
Netherlands	2·5	− 5·5	5·0
United Kingdom	− 3·4	− 4·4	1·9
Community	0·3	− 7·1	3·9

TABLE 3

Community's coal consumption by sector

(in 1 000 tce)

	1974 Actual	1975 Esti-mates	1976 Fore-casts	1975/1974 %	1976/1975 %
Coke-ovens	107 628	104 650	101 850	− 2·8	− 2·7
Thermal power stations	102 887	100 005	106 907	− 2·8	+ 6·9
Iron and steel industry	4 046	3 130	3 395	− 22·7	+ 8·5
Other industries	16 792	13 007	14 187	− 22·5	+ 9·1
Domestic heating	27 044	22 643	22 413	− 16·3	− 1·1
Briquettes	6 709	6 235	5 825	− 7·1	− 6·6
Gasworks	2 203	1 960	1 835	− 11·1	− 6·4
Consumption for production	2 127	1 855	1 905	− 12·8	+ 2·7
Others	2 090	1 410	1 490	− 32·5	+ 5·7
Total	271 526	254 895	259 807	− 6·2	+ 1·9

TABLE 4

Pig iron production

(in 1 000 metric tons)

	1974 Actual	1975 Esti-mates	1976 Forecasts		% 1975/1974	% 1976/1975
			Steel	Pig iron		
Belgium	13 152	9 340	13 000	10 400	− 29·0	+ 11·3
Denmark	—	—	1 000	—	—	—
Federal Republic of Germany	40 221	30 225	46 000	34 500	− 24·9	+ 14·1
France	22 517	18 080	23 000	19 205	− 19·8	+ 6·2
Ireland	—	—	100	—	—	—
Italy	11 761	11 205	22 500	13 500	− 4·8	+ 20·5
Luxembourg	5 468	4 035	5 300	4 505	− 26·2	+ 11·6
Netherlands	4 804	3 800	5 200	4 265	− 20·9	+ 12·2
United Kingdom	14 155	12 600	22 000	13 795	− 11·0	+ 9·5
Community	112 078	89 285	138 100	100 170	− 20·4	+ 12·2

TABLE 5

Specific coke input in blast furnaces

(kg per metric ton)

	1974 Actual	1975 Estimates	1976 Forecasts
Belgium	563	555	550
Federal Republic of Germany	517	500	490
France	552	545	540
Italy	499	500	495
Luxembourg	538	515	515
Netherlands	470	480	480
United Kingdom	596	575	575
Community	537	525	519

TABLE 6

Consumption of coke-oven coke in the iron and steel industry

(in 1 000 metric tons)

	1974 Actual	1975 Esti-mates	1976 Fore-casts	1975/1974 %	1976/1975 %
Belgium	8 277	5 755	6 520	− 30·5	+ 13·3
Denmark	..	65	65	—	—
Federal Republic of Germany	24 053	17 245	19 350	− 28·3	+ 12·2
France	13 536	10 590	11 150	− 21·8	+ 5·3
Ireland	..	10	10	—	—
Italy	6 664	6 235	7 330	− 6·4	+ 17·6
Luxembourg	3 209	2 255	2 520	− 29·7	+ 11·7
Netherlands	2 495	2 015	2 255	− 19·2	+ 11·9
United Kingdom	9 720	8 400	9 180	− 13·6	+ 9·3
Community	67 954	52 570	58 380	− 22·7	+ 11·0

TABLE 7

Community coke-oven coke consumption by sector

(in 1 000 metric tons)

	1974 Actual	1975 Esti-mates	1976 Fore-casts	1975/1974 %	1976/1975 %
Iron and steel industries	67 961	52 570	58 380	− 22·7	+ 11·0
Other industries	6 225	5 331	5 381	− 14·4	+ 0·9
Domestic heating	8 090	6 572	6 161	− 18·8	− 6·3
Others	1 098	1 037	1 027	− 5·6	− 1·0
Total	83 374	65 510	70 949	− 21·4	+ 8·3

TABLE 8

Fuel consumption by conventional power plants and coverage of requirements in %

(in 1 000 tce)

	1974		1975		1976	
	Actual	%	Estimates	%	Forecasts	%
Belgium						
Coal	2 682	18·7	2 398	20·6	2 400	20·6
Lignite	—	—	—	—	—	—
Oil products	6 381	44·5	4 923	42·2	4 938	42·4
Natural gas	3 827	26·7	3 263	28·0	3 219	27·6
Other fuels	1 438	10·1	1 085	9·2	1 086	9·4
Total	14 328	100·0	11 669	100·0	11 643	100·0
Denmark						
Coal	2 081	32·4	2 107	32·9	2 271	34·0
Lignite	—		—		—	
Oil products	4 343	67·6	4 293	67·1	4 400	66·0
Natural gas	—		—		—	
Other fuels	—		—		—	
Total	6 424	100·0	6 400	100·0	6 671	100·0
Federal Republic of Germany						
Coal	34 339	35·6	25 157	28·5	30 000	33·7
Lignite	29 761	30·9	30 086	34·0	30 786	34·6
Oil products	9 639	10·0	8 171	9·2	7 586	8·5
Natural gas	16 739	17·4	19 429	22·0	15 028	16·9
Other fuels	5 887	6·1	5 586	6·3	5 600	6·3
Total	96 365	100·0	88 429	100·0	89 000	100·0
France						
Coal	8 487	23·3	8 000	24·4	8 500	24·7
Lignite	1 077	3·0	1 025	3·1	1 100	3·2
Oil products	20 844	57·4	17 818	54·2	18 572	53·9
Natural gas	3 182	8·8	3 550	10·8	3 800	11·0
Other fuels	2 747	7·5	2 450	7·5	2 500	7·2
Total	36 337	100·0	32 843	100·0	34 472	100·0
Ireland						
Coal	35	1·3	35	1·4	36	1·3
Lignite and peat	824	31·6	814	31·6	857	32·1
Oil products	1 753	67·1	1 729	67·0	1 779	66·6
Natural gas	—		—		—	
Other fuels	—		—		—	
Total	2 612	100·0	2 578	100·0	2 672	100·0
Italy						
Coal	936	2·9	670	2·2	1 000	3·2
Lignite	388	1·2	521	1·7	536	1·7
Oil products	28 427	87·1	25 583	83·3	24 621	79·0
Natural gas	1 306	4·0	2 403	7·8	3 414	10·9
Other fuels	1 581	4·8	1 551	5·0	1 614	5·2
Total	32 638	100·0	30 728	100·0	31 185	100·0

TABLE 8 *(cont'd)*

Fuel consumption by conventional power plants and coverage of requirements in %

(in 1 000 tce)

	1974		1975		1976	
	Actual	%	Estimates	%	Forecasts	%
Luxembourg						
Coal	19	3·4	14	3·2	14	3·2
Lignite	—		—		—	
Oil products	153	27·8	129	29·0	129	29·9
Natural gas	51	9·3	46	10·4	43	10·0
Other fuels	327	59·5	255	57·4	246	56·9
Total	550	100·0	444	100·0	432	100·0
Netherlands						
Coal	324	1·9	214	1·3	186	1·1
Lignite	—		—		—	
Oil products	1 405	8·3	1 500	9·1	1 829	10·7
Natural gas	14 643	86·2	14 227	86·1	14 536	84·7
Other fuels	605	3·6	583	3·5	600	3·5
Total	16 977	100·0	16 524	100·0	17 151	100·0
United Kingdom						
Coal	53 984	63·3	61 410	75·0	62 500	75·8
Lignite	—		—		—	
Oil products	26 943	31·6	17 083	20·8	17 843	21·6
Natural gas	3 562	4·2	2 614	3·2	1 214	1·5
Other fuels	845	0·9	821	1·0	900	1·1
Total	85 334	100·0	81 928	100·0	82 457	100·0
Community						
Coal	102 887	35·3	100 005	36·8	106 907	38·8
Lignite and peat	32 050	11·0	32 446	12·0	33 279	12·1
Oil products	99 888	34·3	81 229	29·9	81 697	29·6
Natural gas	43 310	14·8	45 532	16·8	41 254	15·0
Other fuels	13 430	4·6	12 331	4·5	12 546	4·5
Total	291 565	100·0	271 543	100·0	275 683	100·0

TABLE 9

Coal and coke-oven coke consumption in the various industries (1)

(not including power stations)

(in 1 000 metric tons)

	1974 Actual	1975 Estimates	1976 Forecasts	1975/1974 %	1976/1975 %
Belgium	902	810	830	− 10·2	+ 2·5
Denmark	572	525	500	− 8·2	− 4·8
Federal Republic of Germany	6 004	4 000	4 100	− 33·3	+ 2·5
France	3 447	2 700	3 000	− 21·7	+ 11·1
Ireland	85	80	80	− 5·9	—
Italy	817	660	750	− 19·2	+ 13·6
Luxembourg	3	3	3	—	—
Netherlands	290	260	255	− 10·3	− 1·9
United Kingdom	10 897	9 300	10 050	− 14·7	+ 8·1
Community	23 017	18 338	19 568	− 20·3	+ 6·7

(1) Coke-oven coke assigned a value of unity.

TABLE 10

Deliveries of solid fuels for domestic heating

(including issues to mineworkers)

(in million tce)

	1974 Actual	1975 Estimate	1976 Forecasts	1975/1974 %	1976/1975 %
Belgium	3·3	2·7	2·5	− 17·3	− 9·5
of which: coal	2·7	2·3	2·1	− 16·0	− 7·8
briquettes	0·5	0·3	0·3	− 27·2	− 19·1
coke	0·1	0·1	0·1	—	− 17·6
Denmark	0·2	0·2	0·2	− 16·3	− 5·9
Federal Republic of Germany	12·0	9·7	9·1	− 19·0	− 6·3
of which: coal	2·4	1·9	1·8	− 18·8	− 5·3
briquettes	2·0	1·6	1·5	− 18·9	− 4·9
coke	3·8	2·9	2·8	− 23·7	− 5·1
lignite	3·8	3·3	3·0	− 14·5	− 7·7
France	8·2	7·7	6·5	− 6·5	− 15·0
of which: coal	4·3	3·8	3·5	− 10·7	− 7·9
briquettes	3·3	3·3	2·7	− 2·3	− 18·8
coke	0·4	0·4	0·2	+ 2·2	− 51·2
lignite	0·2	0·2	0·1	− 0·6	− 14·3
Ireland	1·5	1·4	1·3	− 8·1	− 1·5
of which: coal	0·6	0·6	0·6	− 2·4	− 3·3
peat and briquettes	0·9	0·8	0·7	− 12·2	—
Italy	0·8	0·5	0·5	− 36·4	− 1·0
of which: coal	0·3	0·2	0·2	− 36·6	—
briquettes	0·1	0·1	0·1	− 1·4	− 14·3
coke	0·4	0·2	0·2	− 45·2	+ 7·9
Luxembourg	0·1	0·1	0·1	—	—
Netherlands	0·3	0·2	0·2	− 48·6	− 6·1
United Kingdom	21·6	18·1	18·8	− 15·9	+ 3·6
of which: coal	16·4	13·6	14·0	− 17·0	+ 2·9
briquettes	1·2	1·0	1·4	− 13·9	+ 34·8
coke	4·0	3·5	3·4	− 11·3	− 2·9
Community	48·0	40·6	39·2	− 15·5	− 3·4
of which: coal	27·1	22·7	22·4	− 16·3	− 1·0
briquettes	7·1	6·4	6·0	− 10·8	− 6·5
coke	8·8	7·2	6·8	− 17·8	− 6·4
lignite and peat	5·0	4·3	4·0	− 13·9	− 6·6

TABLE 11

Hard coal production by areas

(in 1 000 metric tons national series)

	1974	1975 Provisional	1976 Forecasts
Campine	6 073	5 971	6 250
Sud	2 038	1 508	1 250
Belgium	8 111	7 479	7 500
Ruhr (1)	78 171	76 480	74 500
Aachen (1)	5 827	5 700	5 500
Niedersachsen (1)	1 948	1 800	1 900
Saarland	8 930	8 800	8 600
Federal Republic of Germany	94 876	92 780	90 500
Nord/Pas-de-Calais	9 011	7 700	7 250
Lorraine	9 066	10 014	11 200
Centre-Midi	4 818	4 700	4 600
France	22 895	22 414	23 050
Ireland	68	65	60
Italy	—	—	—
Netherlands	758	—	—
Scotland	8 671	9 900	—
North East	12 876	14 800	—
Yorkshire	28 047	32 700	—
North West	10 877	12 300	—
Midlands	30 898	37 000	—
South Wales	7 414	8 600	—
Kent	648	700	—
Licensed mines } Opencast }	9 814	11 200	—
United Kingdom	109 245	127 200	129 500
Community	235 953	250 658	250 610

(1) Series in tce.

TABLE 12

Hard coal production

(in 1 000 tce)

	1974 Actual	1975 Provisional	1976 Forecasts	Change in %	
				1975/1974	1976/1975
Belgium	7 387	6 850	6 850	− 7·8	—
Federal Republic of Germany	96 011	93 946	91 600	− 2·2	− 2·5
France	20 820	20 450	21 000	− 1·8	+ 2·7
Ireland	68	65	65	− 4·4	—
Netherlands	742	—	—	− 100·0	—
United Kingdom	98 819	115 750	117 200	+ 17·1	+ 1·2
Community	223 847	237 061	236 715	+ 5·9	− 0·2

TABLE 13

Average number of miners working below ground

(in 1 000's)

	1974	1975	1976	Difference 1975/1974		Difference 1976/1975	
				1 000 men	%	1 000 men	%
Belgium	18·6	18·8	17·4	+ 0·2	+ 1·1	− 1·4	− 7·5
Federal Republic of Germany	109·3	109·9	108·0	+ 0·6	+ 0·6	− 1·9	− 1·7
France	42·0	40·7	38·4	− 1·3	− 3·1	− 2·3	− 5·7
Ireland	0·3	0·3	0·3	—	—	—	—
Netherlands	1·2	—	—	− 1·2	− 100·0	—	—
United Kingdom	169·2	172·7	170·5	+ 3·5	+ 2·1	− 2·2	− 1·3
Community	340·6	342·4	334·6	+ 1·8	+ 0·5	− 7·8	− 2·3

TABLE 14

Output per underground manshift

	In kg per manshift			Change (in %)	
	1974 Actual	1975 Esti-mates	1976 Fore-cast	1975/1974	1976/1975 Fore-cast
Belgium	2 597	2 424	2 600	− 6·7	+ 7·2 (1)
Federal Republic of Germany	4 196	4 061	3 950	− 3·2	− 2·3
France	2 799	2 761	3 000	− 1·4	+ 8·8 (1)
Ireland	..	..	..	..	..
Netherlands	4 219	—	—	—	—
United Kingdom	3 350	3 493	3 600	+ 4·3	+ 3·0

Output per underground manshift (per month) in United Kingdom	1974	1975
January	2 794	3 566
February	..	3 636
March	3 268	3 585
April	3 268	3 534
May	3 496	3 632
June	3 465	3 425
July	3 438	3 310
August	3 436	3 153
September	3 497	3 333
October	3 664	3 554
November	3 630	3 559
December	3 589	..
Total	3 350	3 493

(1) Target figures.

TABLE 15

Production costs and revenue (per metric ton)

(% variations according to data supplied in national currencies)

	Production costs		Revenue	
	1974/1973	1975/1974 (Provisional)	1974/1973	1975/1974 (Provisional)
Belgium	+ 16·2	+ 27·4	+ 44·0	+ 46·3
Federal Republic of Germany	+ 24·0	+ 15·9	+ 24·4	+ 20·8
France	+ 22·0	+ 24·9	+ 53·7	+ 28·7
United Kingdom	+ 43·2	+ 33·2	+ 41·1	+ 47·0

TABLE 16

State aids to the coal industry

(direct and indirect aids)

(in u.a. per metric ton produced)

	Direct aids (1)		Indirect aids		Total	
	1974	1975	1974	1975	1974	1975
Belgium	15·20	13·35	0·67	1·19	15·87	14·54
Federal Republic of Germany	2·98	3·43	1·04	0·09	4·02	3·52
France	10·95	7·80	0·31	0·16	11·26	7·96
United Kingdom	1·41	0·43	—	—	1·41	0·43
Community	3·51	2·58	0·49	0·08	4·00	2·66

(1) Including aids in respect of coking coal.

TABLE 17

Investments in coal production and preparation

(in millions EUR)

	1974	1975	1976 (1) Forecasts
Belgium	4·3	13·5	2·0
Federal Republic of Germany	106·6	233·6	134·7
France	16·4	21·0	33·2
United Kingdom	196·9	246·2	235·4
Total	324·2	514·3	405·3

(1) Excluding investments not formally decided or engaged.

TABLE 18

Pit closures

(in 1 000 metric tons)

	1975		1976	
	Number	1974 output	Number	1974 output
Belgium (Sud)	1	123	2	327
Federal Rep. of Germany:				
— (Ruhr)	—	—	2	2 462
— (Aachen)	1	837	—	
United Kingdom:				
— (Scottish)	1	100		
— (North East)	2	200		
— (South Wales)	3	200		
Total UK	6	500	..	..
Community	8	1 460	4 (1)	2 789 (1)

(1) Total excluding United Kingdom.

TABLE 19

Listed pithead prices for Community coal at 15 January 1975, 1 July 1975 and 15 January 1976

(in national currencies/metric ton)

Categories	Types	Date	Ruhr (DM)	Aachen (DM)	Saar (DM)	Belgium (Bfrs)	Nord (FF)	Lorraine (FF)	South Wales (£)	Scottish (£)	North Yorkshire (£)
Anthracite	Nuts 3	15. 1. 1975	207·00	—	—	3 125	292·50	—	25·34	—	—
	20/30 mm	1. 7. 1975	207·00	—	—	3 125	351·00	—	29·77	—	—
	$1^1/_2$" × $^3/_4$"	15. 1. 1976	219·00	—	—	3 125	351·00	—	29·77	—	—
Lean coal	Nuts 3	15. 1. 1975	199·00	198·00	—	2 970	—	—	21·06	—	—
	20/30 mm	1. 7. 1975	199·00	198·00	—	2 970	—	—	25·39	—	—
	$1^1/_2$" × $^3/_4$"	15. 1. 1976	211·00	205·00	—	2 970	—	—	25·39	—	—
Semi-bituminous	Nuts 4	15. 1. 1975	155·00	173·00	—	2 390	—	—	14·86	—	—
	10/20 mm	1. 7. 1975	155·00	173·00	—	2 390	—	—	18·80	—	—
	$^3/_4$" × $^3/_8$"	15. 1. 1976	167·00	181·00	—	2 390	—	—	18·80	—	—
Long flame	Nuts 2	15. 1. 1975	145·50	—	163·00	2 450	198·50	184·00	15·35	17·32	14·86
	30/50 mm	1. 7. 1975	145·50	—	163·00	2 450	—	216·00	19·39	22·54	19·49
	2" × 1"	15. 1. 1976	155·50	—	176·00	2 450	—	216·00	19·39	22·54	19·49
Long flame	Nuts 5	15. 1. 1975	145·50	—	154·00	2 450	194·50	160·00 (2)	—	16·14	13·39
	6/10 mm	1. 7. 1975	145·50	—	154·00	2 450	—	192·00 (2)	—	20·96	17·52
	$^3/_8$" × $^1/_4$"	15. 1. 1976	157·50	—	173·00	2 450	—	192·00 (2)	—	20·96	17·52
Coking coal	Medium	15. 1. 1975	158·00	155·00	172·50	2 500	360·00	310·00	20·08	19·19	16·04
	or high (3)	1. 7. 1975	158·00	160·00	172·50	2 500	360·00	310·00	27·17	25·39	21·26
	volatile	15. 1. 1976	165·50	167·50	180·00	2 500	360·00	310·00	27·17	25·39	21·26
Coke	Blast furnace	15. 1. 1975	246·00	237·00	276·00	4 300 (1)	530·00	461·00	36·56	35·58	35·09
	$^1/_2$"	1. 7. 1975	246·00	244·50	276·00	4 300 (1)	530·00	461·00	48·87	47·88	47·39
	> 40 mm	15. 1. 1976	258·00	257·00	286·00	3 700 (1)	530·00	461·00	48·87	47·88	47·39

(1) Zeebrugge large graded coke.
(2) Power stations: 232·90 to 241·56.
(3) High volatile.

TABLE 20

Listed pithead prices for Community coal at 15 January 1975, 1 July 1975 and 15 January 1976

(in $/metric ton)(1)(2)

Categories	Types	Date	Ruhr	Aachen	Saar	Belgium	Nord	Lorraine	South Wales	Scottish	North Yorkshire	Extreme prices		Difference (%)
												lowest	highest	
Anthracite	Nuts 3	15. 1. 1975	85·50	—	—	86·04	65·55	—	59·21	—	—	59·21	86·04	45
	20/30 mm	1. 7. 1975	87·94	—	—	88·65	86·88	—	65·43	—	—	65·43	88·55	35
	3/4" × 1 1/4"	15. 1. 1976	83·52	—	—	79·05	78·37	—	60·23	—	—	60·23	83·52	39
Lean coal	Nuts 3	15. 1. 1975	82·20	81·78	—	81·77	—	—	49·20	—	—	49·20	82·20	67
	20/30 mm	1. 7. 1975	84·54	84·11	—	84·26	—	—	55·81	—	—	55·81	84·54	51
	3/4" × 1 1/4"	15. 1. 1976	80·47	78·19	—	75·13	—	—	51·37	—	—	51·37	80·47	57
Semi-bituminous	Nuts 4	15. 1. 1975	64·02	71·46	—	65·80	—	—	34·72	—	—	34·72	71·46	106
	10/20 mm	1. 7. 1975	65·85	73·49	—	67·80	—	—	41·32	—	—	41·32	73·49	78
	0 × 3/4"	15. 1. 1976	63·69	69·03	—	60·46	—	—	38·04	—	—	38·04	69·03	82
Long flame	Nuts 2	15. 1. 1975	60·10	—	67·33	67·46	44·49	41·24	35·87	40·47	34·72	34·72	67·46	94
	30/50 mm	1. 7. 1975	61·81	—	69·24	69·50	—	53·47	42·62	49·54	42·84	42·62	69·43	63
	1 1/4" × 2"	15. 1. 1976	59·31	—	67·12	61·98	—	48·23	39·23	45·61	39·43	39·23	67·12	71
Long flame	Nuts 5	15. 1. 1975	60·10	—	63·61	67·46	43·59	35·86 (4)	—	37·71	31·27	31·27	67·46	116
	6/10 mm	1. 7. 1975	61·81	—	65·42	69·50	—	47·52 (5)	—	46·07	38·51	38·51	69·43	80
	0 × 3/8"	15. 1. 1976	60·07	—	65·98	61·98	—	42·87 (6)	—	42·41	35·45	35·45	65·98	86
Coking coal	Medium	15. 1. 1975	65·26	64·02	71·95 (3)	68·83	80·68	69·48 (3)	46·91	44·83 (3)	37·48	37·48	80·68	115
	or high (3)	1. 7. 1975	67·12	67·97	73·28	70·92	89·11	76·73	59·72	55·81	46·73	46·73	89·11	91
	volatile	15. 1. 1976	63·12	63·88	68·85	63·24	80·38	69·21	54·97	51·37	43·02	43·02	80·38	87
Coke	Blast furnace	15. 1. 1975	101·61	97·89	114·00	118·39	118·78	103·32	85·42	83·12	81·97	81·97	118·78	45
	> 1/2"	1. 7. 1975	104·50	103·87	117·25	121·99	131·19	114·11	107·42	105·24	104·16	103·87	131·19	26
	> 40 mm	15. 1. 1976	98·40	98·02	109·08	93·60	118·33	102·93	98·88	96·88	95·88	93·60	118·33	26

(1) Dollar exchange rate:

	DM	Index	Bfrs	Index	FF	Index	£	Index
2. 1. 1975	2 421	100	36·32	100	4 462	100	0·43	100
30. 6. 1975	2 354	97	35·25	97	4 040	91	0·45	105
2. 1. 1976	2 622	108	39·53	109	4 479	100	0·49	114

(2) Prices are not adjusted for quality differences.
(3) High volatile.
(4) For power stations = 52·20-54·14 $/metric ton.
(5) For power stations = 57·65-59·79 $/metric ton.
(6) For power stations = 52·00-53·93 $/metric ton.

TABLE 21

Coke-oven production capacity

(in million metric tons)

	Belgium	Federal Republic of Germany	France	Italy	Nether-lands	United Kingdom	Commu-nity
1974							
Colliery coke ovens	—	27·7	7·8	—	—	4·5	40·0
Iron and steel industry coke ovens	7·9	8·4	5·9	6·9	2·3	11·2	42·6
Independent coke ovens	0·5	—	—	2·5	0·7	3·6	7·3
Total	8·4	36·1	13·7	9·4	3·0	19·3	89·9
of which coastal coking plants	1·5	0·4	2·7	9·4	3·0	..	..
1975							
Colliery coke ovens	—	27·0	7·7	—	—	4·8	39·5
Iron and steel industry coke ovens	7·9	8·9	6·9	8·3	2·4	10·3	44·7
Independent coke ovens	0·5	—	—	2·5	0·7	3·6	7·3
Total	8·4	35·9	14·6	10·8	3·1	18·7	91·5
of which coastal coking plants	1·5	0·5	4·0	10·8	3·1	..	
1976							
Colliery coke ovens	—	27·3	7·6	—	—	4·7	39·6
Iron and steel industry coke ovens	8·2	9·3	7·0	9·0	2·5	11·2	47·2
Independent coke ovens	0·5	—	—	2·5	0·7	3·6	7·3
Total	8·7	36·6	14·6	11·5	3·2	19·5	94·1
of which coastal coking plants	1·6	0·5	4·0	11·5	3·2	..	

TABLE 22

Coke-oven coke

(in 1 000 metric tons)

	Coal deliveries to coking plants	Consumption of coal in coking plants	Production of coke-oven coke	
			1 000 metric tons	Variation in % versus previous year
1974 (actual)				
Belgium	10 468	10 517	8 049	+ 3·5
Federal Republic of Germany	44 720	44 607	34 960	+ 2·8
France	16 362	15 878	11 877	0·0
Italy	11 734	11 614	8 566	+ 11·6
Netherlands	3 369	3 369	2 683	+ 1·0
United Kingdom	21 643	21 643	16 298 (1)	− 8·3
Community	108 296	107 628	82 433	+ 0·8
1975 (estimated)				
Belgium	7 800	7 475	5 746	− 28·6
Federal Republic of Germany	45 000	45 270	34 820	− 0·4
France	15 500	14 890	11 448	− 3·6
Italy	11 100	10 725	8 250	− 3·7
Netherlands	3 250	3 450	2 650	− 1·2
United Kingdom	22 440	22 050	15 800 (1)	− 3·1
Community	105 090	103 860	78 714	− 4·5
1976 (forecasts)				
Belgium	8 850	8 850	6 800	+ 18·3
Federal Republic of Germany	44 000	41 500	32 000	− 8·1
France	14 500	14 500	11 200	− 2·2
Italy	11 500	11 500	8 800	+ 6·7
Netherlands	3 500	3 500	2 650	—
United Kingdom	22 000	22 000	15 750 (1)	− 0·3
Community	104 350	101 850	77 200	− 7·9

(1) Includes low-temperature coke.

TABLE 23

Coal supplies to coke ovens

(in 1 000 metric tons)

	National coal	Coal from other ECSC countries	Total ECSC coal	Coal from third countries	Total supplies
Belgium					
1973	5 062	1 833	6 895	2 981	9 876
1974	4 703	2 401	7 104	3 364	10 468
1975	4 475	1 750	6 225	1 575	7 800
Federal Republic of Germany					
1973	43 351	—	43 351	34	43 385
1974	44 655	4	44 659	61	44 720
1975	44 750	200	44 950	50	45 000
France					
1973	9 184	3 897	13 081	2 602	15 683
1974	8 402	4 083	12 485	3 877	16 362
1975 (1)	7 700	3 800	11 500	4 000	15 500
Italy					
1973	—	2 730	2 730	7 657	10 387
1974	—	3 249	3 249	8 485	11 734
1975	—	3 000	3 000	8 100	11 100
Netherlands					
1973	—	712	712	2 722	3 434
1974	—	736	736	2 633	3 369
1975	—	730 (1)	730	2 520	3 250
United Kingdom					
1973	22 509	200	22 709	1 000	23 709
1974	20 763	49	20 812	831	21 643
1975	21 587	50 (1)	21 637	803	22 440
Community					
1973	80 106	9 372	89 478	16 996	106 474
1974	78 523	10 522	89 045	19 251	108 296
1975	78 512	9 530	88 042	17 048	105 090

(1) Estimates.

TABLE 24

Trend of intra-Community trade in coal

(in 1 000 metric tons)

To \ From	Belgium	Denmark	Federal Republic of Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total
Belgium										
1974	—	—	4 512	108	—	—	—	300	243	5 163
1975	—	—	3 700	100	—	—	—	5	450	4 255
1976	—	—	4 050	100	—	—	—	—	325	4 475
Denmark										
1974	—	—	2	—	—	—	—	—	6	8
1975	—	—	10	—	—	—	—	—	—	10
1976	—	—	10	—	—	—	—	—	—	10
Federal Rep. of Germany										
1974	222	—	—	373	16	—	—	387	511	1 509
1975	300	—	—	450	—	—	—	75	670	1 495
1976	210	—	—	350	—	—	—	—	900	1 460
France										
1974	103	—	6 788	—	—	—	—	111	493	7 495
1975	200	—	5 950	—	—	—	—	50	800	7 000
1976	170	—	5 030	—	—	—	—	—	500	5 700
Ireland										
1974	—	—	49	—	—	—	—	—	83	132
1975	—	—	5	—	—	—	—	—	95	100
1976	—	—	—	—	—	—	—	—	80	80
Italy										
1974	—	—	3 425	44	—	—	—	—	51	3 520
1975	—	—	3 200	25	—	—	—	—	25	3 250
1976	—	—	3 435	40	—	—	—	—	25	3 500
Luxembourg										
1974	31	—	511	—	—	—	—	9	33	584
1975	5	—	515	5	—	—	—	—	—	525
1976	—	—	545	5	—	—	—	—	—	550
Netherlands										
1974	18	—	1 147	3	—	—	—	—	6	1 174
1975	30	—	700	—	—	—	—	—	350	1 080
1976	25	—	770	5	—	—	—	—	200	1 000
United Kingdom										
1974	2	—	68	1	7	—	—	29	—	107
1975	—	—	50	—	—	—	—	—	—	50
1976	—	—	50	—	—	—	—	—	—	50
Total deliveries										
1974	376	—	16 502	529	23	—	—	836	1 426	19 692
1975	535	—	14 130	580	—	—	—	130	2 390	17 765
1976	405	—	13 890	500	—	—	—	—	2 030	16 825

TABLE 25

Trend of intra-Community trade in coke

(in 1 000 metric tons)

To \ From	Belgium	Denmark	Federal Republic of Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total
Belgium										
1974	—	—	553	423	—	4	—	198	156	1 334
1975	—	—	200	250	—	—	—	200	150	800
1976	—	—	150	200	—	—	—	200	50	600
Denmark										
1974	—	—	54	54	—	—	—	—	1	109
1975	—	—	20	40	—	—	—	—	40	100
1976	—	—	20	40	—	—	—	—	40	100
Federal Rep. of Germany										
1974	55	—	—	293	—	—	—	46	145	539
1975	50	10	—	90	—	—	—	70	280	500
1976	60	10	—	210	—	—	—	75	100	455
France										
1974	147	—	3 806	—	—	77	—	385	32	4 447
1975	90	—	2 060	—	—	40	—	300	—	2 490
1976	125	—	2 450	—	—	50	—	275	30	2 930
Ireland										
1974	—	—	—	—	—	—	—	1	8	9
1975	—	—	10	—	—	—	—	—	—	10
1976	—	—	—	—	—	—	—	—	10	10
Italy										
1974	—	—	19	45	—	—	—	—	14	78
1975	—	—	70	45	—	—	—	—	30	145
1976	—	—	75	—	—	—	—	—	—	75
Luxembourg										
1974	118	—	2 998	41	—	—	—	8	—	3 165
1975	110	—	2 125	25	—	—	—	—	—	2 260
1976	110	—	2 390	30	—	—	—	—	—	2 530
Netherlands										
1974	38	—	488	19	—	—	—	—	213	758
1975	20	—	320	25	—	—	—	—	—	365
1976	20	—	360	20	—	—	—	—	—	400
United Kingdom										
1974	2	—	—	1	—	—	—	—	—	3
1975	—	—	—	—	—	—	—	—	—	—
1976	—	—	—	—	—	—	—	—	—	—
Total deliveries										
1974	360	—	7 918	876	—	81	—	638	569	10 442
1975	270	10	4 805	475	—	40	—	570	500	6 670
1976	315	10	5 445	500	—	50	—	550	230	7 100

TABLE 26

Imports of coal from third countries

A. According to country of destination

(in million metric tons)

	1974 Actual	1975 Estimated	1976 Forecasts
Belgium and Luxembourg	4·3	3·0	2·2
Denmark	3·5	3·5	3·0
Federal Republic of Germany	4·8	5·3	4·7
France	8·8	11·2	9·0
Ireland	0·8	0·8	0·7
Italy	9·3	9·1	9·5
Netherlands	3·0	2·7	2·9
United Kingdom	3·5	4·5	3·5
Community	38·0	40·1	35·5

B. According to country of origin

(in million metric tons)

	1974 Actual	1975 Estimated	1976 Forecasts
USA	12·7	13·7	11·4
Poland	15·3	14·1	13·9
USSR	4·1	3·7	2·5
Australia	3·8	5·6	4·2
South Africa	1·3	1·9	2·5
Others	0·8	1·1	1·0
Total	38·0	40·1	35·5

TABLE 27

Community imports in 1975

(in million metric tons)

	USA	Poland	USSR	Austra-lia	South Africa	Others	Total
Belgium	0·6	1·5	0·2	0·2	0·4	0·1	3·0
Denmark		3·0	0·3			0·2	3·5
Federal Republic of Germany	2·6	1·8	0·1	0·2	0·4	0·2	5·3
France	3·6	3·4	1·7	1·3	0·9	0·3	11·2
Ireland	0·1	0·7	—	—	—	—	0·8
Italy	4·0	2·6	1·4	1·0	0·1	—	9·1
Netherlands	1·1	1·0	—	0·5		0·1	2·7
United Kingdom	1·8	0·1	—	2·4	—	0·2	4·5
Community	13·7	14·1	3·7	5·6	1·9	1·1	40·1

NB: Totals have not been rounded off.

TABLE 28

Community producers' stocks of coal and coke-oven coke

(in 1 000 metric tons)

	Belgium	Federal Republic of Germany (1)	France	Ireland	Italy	Nether-lands	United Kingdom	Commu-nity
End 1974								
Hard coal	244	1 467	3 236	20	—	—	5 979	10 946
Coke	283	1 678	278	—	748	9	974	3 970
Total (A)	612	3 649	3 597	20	972	12	7 245	16 107
End 1975								
Hard coal	805	6 680	5 470	20	—	—	10 700	23 675
Coke	150	8 800	1 100	—	1 350	15	1 700	13 115
Total (B)	1 000	18 120	6 900	20	1 755	20	12 910	40 725
End 1976								
Hard coal	285	6 500	6 795	20	—	—	18 355	31 955
Coke	150	11 810	1 030	—	1 320	15	2 070	16 395
Total (C)	480	21 850	8 135	20	1 715	20	21 045	53 265
Difference (B) − (A)	+ 388	+ 14 471	+ 3 303	—	+ 783	+ 8	+ 5 665	+ 24 618
Difference (C) − (B)	− 520	+ 3 730	+ 1 235	—	− 40	—	+ 8 135	+ 12 540

NB: Totals A, B, C: value in terms of coal equivalent for coke: factor 1·3.
(1) National series.

Balance of supply and demand: hard coal 1976

(in 1 000 metric tons - national series)

	Belgium	Denmark	Federal Republic of Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Community
1. Production	7 500		90 500	23 050	60	—	—	—	129 500	250 610
2. Pitch for patent fuels + correction for recovered slurries	650		6 700	1 300	—	—	—	—	500	9 150
3. Imports from third countries	2 125	3 000	4 700	9 000	700	9 515	20	2 950	3 500	35 510
4. Receipts from other ECSC countries	4 475	10	1 460	5 700	80	3 500	550	1 000	50	(16 825)
5. Total availabilities	14 750	3 010	103 360	39 050	840	13 015	570	3 950	133 550	295 270
6. Inland demand:										
(a) Power stations at mines	420	—	9 500	5 100	—	—	—	—	300	15 320
(b) Public power stations	2 470	2 370	21 100	7 000	50	1 000	—	150	75 000	109 140
(c) Coking plants	8 850	—	41 500	14 500	—	11 500	—	3 500	22 000	101 850
(d) Iron and steel industry	185	—	1 100	2 200	—	25	555	—	350	4 415
(of which power stations)	(20)	(—)	(800)	(200)	(—)	(—)	(—)	(—)	(—)	(1 020)
(e) Other industries	510	500	7 800	2 000	80	150	2	35	9 650	20 727
(of which power stations)	(40)	(—)	(5 200)	(300)	(—)	(—)	(—)	(—)	(1 000)	(6 540)
(f) Domestic heating	2 025	65	1 200	3 300	580	180	13	150	12 000	19 513
(g) Miscellaneous:										
(1) Issues to workers	100	—	600	200		—	—	—	2 000	2 900
(2) Patent fuel plants	225	—	1 700	2 500		60	—	—	1 340	5 825
(3) Own consumption at mines	55	—	500	350		—	—	—	1 000	1 905
(4) Gasworks	—	75	1 700	—	60	—	—	—	—	1 835
(5) Railways	10	—	500	—		100	—	—	—	610
(6) Others	—	—	700	—	70	—	—	110	—	880
Total	14 850	3 010	87 900	37 150	840	13 015	570	3 945	123 640	284 920
7. Exports to third countries	15	—	1 750	75	—	—	—	5	225	2 070
8. Deliveries to other ECSC countries	405	—	13 890	500	—	—	—	—	2 030	(16 825)
9. Total requirements	15 270	3 010	103 540	37 725	840	13 015	570	3 950	125 895	286 990
10. Producers' stocks (beginning)	805	—	6 680	5 470	20	—	—	—	10 700	23 675
11. Additions to/withdrawal	− 520	—	− 180	+ 1 325	—	—	—	—	+ 7 655	+ 8 280
12. Producers' stocks (end)	285	—	6 500	6 795	20	—	—	—	18 355	31 955

Hard coal — intra-Community exchanges 1976

(in 1 000 metric tons)

To \ From	Belgium	Denmark	Federal Republic of Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total receipts
Belgium	—	—	4 050	100	—	—	—	—	325	4 475
Denmark	—	—	10	—	—	—	—	—	—	10
Federal Republic of Germany	210	—	—	350	—	—	—	—	900	1 460
France	170	—	5 030	—	—	—	—	—	500	5 700
Ireland	—	—	—	—	—	—	—	—	80	80
Italy	—	—	3 435	40	—	—	—	—	25	3 500
Luxembourg	—	—	545	5	—	—	—	—	—	550
Netherlands	25	—	770	5	—	—	—	—	200	1 000
United Kingdom	—	—	50	—	—	—	—	—	—	50
Total deliveries	405	—	13 890	500	—	—	—	—	2 030	16 825

Balance of supply and demand: coke-oven coke 1976

(in 1 000 metric tons)

	Belgium	Denmark	Federal Republic of Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Community
1. Production	6 800	—	32 000	11 200	—	8 800	—	2 650	15 750	77 200
2. Imports from third countries	—	20	700	—	—	35	—	—	—	755
3. Receipts from other ECSC countries	600	100	455	2 930	10	75	2 530	400	—	(7 100)
4. Total availabilities	7 400	120	33 155	14 130	10	8 910	2 530	3 050	15 750	77 955
5. Inland demand:										
(a) Iron and steel industry	6 520	65	19 350	11 400	10	7 330	2 525	2 250	9 300	58 750
(b) Other industries	360	—	1 500	1 300	—	600	1	220	1 400	5 381
(c) Domestic users	60	45	1 500	150	—	200	4	8	3 400	5 367
(d) Miscellaneous: — issues to workers	10	—	730	50	—	5	—	—	—	795
— own consumption	—	—	170	400	—	55	—	—	180	805
— others	—	—	150	—	—	—	—	2	70	222
Total	6 950	110	23 400	13 300	10	8 190	2 530	2 480	14 350	71 320
6. Exports to third countries	135	—	1 300	400	—	700	—	20	800	3 355
7. Deliveries to other ECSC countries	315	10	5 445	500	—	50	—	550	230	(7 100)
8. Total requirements	7 400	120	30 145	14 200	10	8 940	2 530	3 050	15 380	74 675
9. Producers' stocks (beginning)	150	—	8 800	1 100	—	1 350	—	15	1 700	13 115
10. Additions/withdrawal from producers' stock	—	—	+ 3 010	− 70	—	− 30	—	—	+ 370	+ 3 280
11. Producers' stocks (end)	150	—	11 810	1 030	—	1 320	—	15	2 070	16 395

Coke-oven coke — intra-Community exchanges, 1976

(in 1 000 metric tons)

From / To	Belgium	Denmark	Federal Republic of Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total receipts
Belgium	—	—	150	200	—	—	—	200	50	600
Denmark	—	—	20	40	—	—	—	—	40	100
Federal Republic of Germany	60	10	—	210	—	—	—	75	100	455
France	125	—	2 450	—	—	50	—	275	30	2 930
Ireland	—	—	—	—	—	—	—	—	10	10
Italy	—	—	75	—	—	—	—	—	—	75
Luxembourg	110	—	2 390	30	—	—	—	—	—	2 530
Netherlands	20	—	360	20	—	—	—	—	—	400
United Kingdom	—	—	—	—	—	—	—	—	—	—
Total deliveries	315	10	5 445	500	—	50	—	550	230	7 100

Balance of supply and demand: Patent fuel, 1976

(in 1 000 metric tons)

	Belgium	Denmark	Federal Republic of Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Community
1. Production	255		1 750	2 750		60			1 375	6 190
2. Imports from third countries	—	—	—	—	—	—	—	—	25	25
3. Receipts from other ECSC countries	50	—	5	45	—	10	—	10	130	(250)
4. Total availabilities	305	—	1 755	2 795	—	70	—	10	1 530	6 215
5. Inland demand:										
(a) Own consumption	5	—	25	10	—	—	—	—	5	45
(b) Issues to workers	—	—	—	—	—	—	—	—	—	—
(c) Domestic uses	270	—	1 545	2 655	—	65	—	10	1 385	5 930
(d) Other industries	10	—	10	5	—	5	—	—	125	155
(e) Miscellaneous	—	—	—	20	—	—	—	—	—	20
Total	285	—	1 580	2 690	—	70	—	10	1 515	6 150
6. Exports to third countries	—	—	50	5	—	—	—	—	10	65
7. Deliveries to other ECSC countries	20	—	125	100	—	—	—	—	5	(250)
8. Total requirements	305	—	1 755	2 795	—	70	—	10	1 530	6 215

Patent fuel — intra-Community exchanges 1976

(in 1 000 metric tons)

From / To	Belgium	Denmark	Federal Republic of Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total receipts
Belgium	—	—	50	—	—	—	—	—	—	50
Denmark	—	—	—	—	—	—	—	—	—	—
Federal Republic of Germany	5	—	—	—	—	—	—	—	—	5
France	5	—	40	—	—	—	—	—	—	45
Ireland	—	—	—	—	—	—	—	—	—	—
Italy	—	—	10	—	—	—	—	—	—	10
Luxembourg	—	—	—	—	—	—	—	—	—	—
Netherlands	5	—	—	—	—	—	—	—	5	10
United Kingdom	5	—	15	110	—	—	—	—	—	130
Total deliveries	20	—	115	110	—	—	—	—	5	250

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