

**COMMISSION OF THE EUROPEAN COMMUNITIES**

SEC(94) 448 final

Brussels, 22.03.1994

**COMMISSION REPORT**

**THE MARKET FOR SOLID FUELS IN THE COMMUNITY  
IN 1993 AND THE OUTLOOK FOR 1994**

## CONTENTS

I. INTRODUCTION	3
II. SUMMARY	4
III. ECONOMIC SITUATION IN THE COMMUNITY IN 1993 AND THE OUTLOOK FOR 1994	7
IV. DEVELOPMENT OF COMMUNITY ENERGY MARKETS	9
V. DEMAND FOR SOLID FUELS	13
Deliveries of hard coal	13
Coke-making	15
Power stations	16
Other industries	19
Domestic use	20
Deliveries of lignite and peat	21
VI. COMMUNITY SOLID FUEL PRODUCTION	22
Hard coal	22
Lignite and peat	25
Coke	25
Labour and productivity	26
State aids	28
Investment trends	30
VII. SOLID FUEL PRICES	31
Exchange rate	31
Trend of imported coal prices	31
(a) coking coal	32
(b) steam coal	33
VIII. TRADE IN SOLID FUELS	34
World trade and production	34
Community trade with third countries	36
Intra-Community trade	39
IX. STOCKS	40
X. CONCLUSIONS	42
ANNEXES	45

## LIST OF TABLES

- 1 Gross internal energy consumption
- 2 Share of solid fuels in gross internal energy consumption
- 3 Community hard coal deliveries by sector and by country
- 4 Coke delivery by sector and by country
- 5 Deliveries of hard coal to coking plants
- 6A Deliveries of hard coal to power stations
- 6B Deliveries of solid fuels to public and pithead power stations (excluding power industries)
- 7 Hard coal and coke deliveries to other industries (excluding power stations)
- 8 Deliveries of solid fuels to the domestic sector (workers included)
- 9 Deliveries of lignite and peat by sector and by Member State
- 10 Hard coal production by area
- 11A Coke production
- 11B Coking plant capacity distribution
- 12A Personnel employed underground
- 12B Output per man/hour underground
- 13 Investments in the coal industry (coal extraction and preparation)
- 14 Exchange rate US \$ : European currencies
- 15A Average CIF prices for coal imported from third countries
- 15B Coking coal imports
- 15C Average price for imported steam coal
- 16 World coal production and trade
- 17 Hard coal from third countries
- 18 Hard coal from third countries
- 19A Hard coal intra-Community exchanges 1994
- 19B Hard coal intra-Community exchanges 1993
- 20A Coke intra-Community exchanges 1994
- 20B Coke intra-Community exchanges 1993
- 21 Stocks of hard coal and coke
- 22 Hard coal balance sheet for 1994
- 23 Hard coal balance sheet for 1993
- 24 Coke balance sheet 1994
- 25 Coke balance sheet 1993
- 26 Lignite and peat balance sheet for 1994
- 27 Lignite and peat balance sheet for 1993

**THE MARKET FOR SOLID FUELS IN THE COMMUNITY  
IN 1993 AND THE OUTLOOK FOR 1994**

**I. INTRODUCTION**

1. *Article 46 of the ECSC Treaty states that, to provide guidance on the course of action to be followed by all concerned, and to determine its own course of action, the Commission must conduct a study of market and price trends.*

*Amongst other things, this includes periodic reports on the solid fuel market and short-term forecasts. Each December the Consultative Committee of the ECSC receives a summary report covering the current year and giving the initial forecasts for the next. The main market report is then written early in the new year, presented to the Consultative Committee at its March/April meeting, and published in May or June. Later, in September, the Consultative Committee is presented with a revised version of the report, which is then published in the last quarter of the year.*

2. *This report analyses the situation of the Community solid fuel market in 1993, makes forecasts for 1994 and gives corrected and updated data for 1992.*

*The data for 1992 and 1993 is that available in January 1994. The forecasts for 1994 were made by the Member States at the end of 1993 and updated as far as possible at the time of writing.*

3. *Figures for the first time refer to the whole Community (including the new German Länder).*

## II. SUMMARY

4. *On average, economic growth in 1993 in the European Community is now estimated to have declined by half a percent. A slow and moderately paced recovery is expected from mid-1994 onwards, resulting in an overall growth rate of 1¼% in 1994.*
5. *According to the latest figures available for 1993 (covering the first ten months of the year), the Community's gross inland energy consumption is estimated to have fallen by more than 1%. This fall has mainly affected solid fuels and, to a much lesser extent, oil and is due to the decline in economic growth.*

*For 1994, total primary energy consumption could increase by between 1% and 1.5% as result of the anticipated moderate recovery of the economy.*

6. *Community hard coal production continues to decline steadily, as a result of the restructuring and rationalisation policies adopted by the Member States. In 1993, total production is estimated to have been 160.3 Mt as compared with 184.6 Mt in 1992 (-24.3 Mt or -13.2%). For 1994, similar developments are expected, with a drop in production of at least 17.9 Mt (approximately -11.2%) with respect to 1993.*

*Similarly, lignite and peat production continues to decrease. Production in 1993 is estimated to have been 302.1 Mt and the forecasts for 1994 point to a small drop of 2.2 Mt to a total of around 300.0 Mt. These falls are the result of the restructuring of the lignite industry in Germany, particularly in the new Länder.*

*Community coke production continues to fall, partly as a result of cutbacks in the steel industry and partly as result of the technological changes introduced into steel production. Coke production in 1993 is estimated to have been 39.5 Mt, compared with 44.1 Mt in 1992, and the forecast for 1994 is for some 37.8 Mt.*

7. *In 1993, for the first time since 1987, total imports of hard coal from third countries have declined with respect to the previous year. Total imports are estimated to have been 116.2 Mt, which is 20.2 Mt (14.8%) less than in 1992. For 1994, hard coal imports could again decrease, with an anticipated drop of 1.8 Mt (-1.6%), to a new total of 114.4 Mt.*
8. *Deliveries of hard coal in the Community fell significantly in 1993 compared to 1992. Internal deliveries accounted for 275.2 Mt, which is 39.2 Mt lower than that for the previous year. This is one of the lowest figure ever registered in the Community.*

*For 1994, the volume of internal deliveries is expected to fall again by 15.6 Mt to 259.6 Mt.*

*A large proportion of this fall in deliveries is due to the lower demand from the electricity generating industry, which is mainly the result of the dramatic changes in the United Kingdom. In the rest of the Community there is a certain stability.*

*9. Imported hard coal prices were lower during 1993 than 1992. The average guide price of coking coal for the fourth quarter of the year dropped from 57.3 US dollars/tonne in 1992 to 55.0 US dollars/tonne in 1993. The CIF price of steam coal imported from third countries was 47.98 US dollar/tce in the third quarter of 1993, compared with 52.36 US dollars/tce for the same period in 1992. However, the depreciation of the Community currencies with respect to the US dollar (some 10%) has largely offset this decrease in prices.*

<b>COMPARISON OF THE MAIN FEATURES OF THE SOLID FUEL MARKET</b>					
<i>(million tonnes)</i>					
	<b>1992</b>	<b>1993</b>	<b>1994</b>	<b>1993/1992</b>	<b>1994/1993</b>
	<i>actual</i>	<i>estimates</i>	<i>forecast</i>	<i>(%)</i>	<i>(%)</i>
<b>HARD COAL</b>					
<i>Resources</i>					
- Production	184.6	160.3	142.3	-13.2	-11.2
- Recoveries	4.8	3.2	2.7	-33.7	-15.6
- Imports from third countries	136.3	116.2	114.4	-14.8	-1.6
<b>Total</b>	<b>325.7</b>	<b>279.6</b>	<b>259.4</b>	<b>-14.1</b>	<b>-7.2</b>
<i>Deliveries</i>					
- To coking plants	60.0	53.4	50.8	-11.0	-4.9
- To power stations*	211.4	181.6	168.5	-14.1	-7.2
- To others	43.0	40.2	40.3	-6.5	+0.1
- Exports to third countries	0.2	0.3	0.3	+28.0	-13.9
<b>Total</b>	<b>314.7</b>	<b>275.5</b>	<b>259.8</b>	<b>-12.4</b>	<b>-5.7</b>
<b>COKE</b>					
<i>Resources</i>					
- Production	44.1	39.5	37.8	-10.5	-4.4
- Imports from third countries	1.7	1.6	1.5	-1.0	-7.2
<b>Total</b>	<b>45.8</b>	<b>41.1</b>	<b>39.3</b>	<b>-10.1</b>	<b>-4.5</b>
<i>Deliveries</i>					
- To steel industry	39.4	35.9	34.8	-8.9	-3.0
- Other deliveries within the Community	4.8	4.5	4.3	-6.1	-4.4
- Exports to third countries	1.0	0.7	0.6	-32.6	-1.5
<b>Total</b>	<b>44.8</b>	<b>41.1</b>	<b>39.8</b>	<b>-8.3</b>	<b>-3.1</b>
<b>LIGNITE AND PEAT</b>					
<i>Resources</i>					
- Production and imports	324.9	305.2	303.0	-6.1	-0.7
<i>Deliveries</i>					
- To briquetting plants	43.6	46.2	45.5	+5.9	-1.5
- To power stations	258.9	235.4	237.3	-9.1	+0.8
- Others (including exports to third countries)	21.6	23.5	20.2	+8.6	-14.0
<b>Total</b>	<b>324.1</b>	<b>305.1</b>	<b>303.0</b>	<b>-5.9</b>	<b>-0.7</b>

(1) Note that the sums may not add up due to rounding.

\* Including industrial power stations

### III. ECONOMIC SITUATION IN THE COMMUNITY IN 1993 AND THE OUTLOOK FOR 1994(1)

10. *The economic slowdown in the Community, which started in the middle of 1990, gave way to an outright recession from the second half of 1992 onwards which intensified during the first half of 1993. Although the decline in economic activity levelled off since the middle of 1993, a recovery is not yet on the horizon. In effect, since mid-1993 incoming information has sent mixed signals. The encouraging signs of slightly improving economic indicators (capacity utilisation, export expectations, etc.) contrast with probably worse GDP growth figures for the last quarter of 1993 compared to the previous two quarters. In addition, expectations are for weak output growth in the first quarter of 1994 as, in a number of countries, new tax measures become effective. The emergence of more solid rates of increase of GDP of one and a half percent or more is not anticipated before the second half of 1994 and beyond.*

*Such a growth profile translates into average yearly figures of real GDP growth of minus half a percent in 1993 and 1 1/4% in 1994.*

11. *Domestic demand in particular was weak in 1993, posting a decline of about 1 1/4 percent. Its impact on overall GDP growth was, however, substantially mitigated by the strong positive contribution of net exports, as the fall in imports was much stronger than the fall in exports. Private consumption fell in 1993 for the first time in Community history, namely by a quarter percent, mainly because of the erosion of real disposable income following low pay rises, rising unemployment and increases in taxation and social security contributions. Investment continued to fall for the third consecutive year, recording a contraction of 4 1/2 percent in 1993.*

12. *The recession had severe ramifications for the labour market and amplifies the deterioration of the Community's budgetary position. Employment is estimated to have fallen by almost 2% last year, while the rate of unemployment rose by one percentage point to an annual average of 10 1/2%, approximating the previous peak reached in 1985. In the Community as a whole, general government net borrowing widened to close to 6 1/2 percent of GDP in 1993, against 5 percent in 1992. This deterioration is the net outcome of several, partially offsetting factors. Adverse cyclical influences and discretionary demand stimuli in some countries have been contributing to a widening*

---

(1) Based on Commission forecasts of November 1993.

*of budget deficits. On the other hand, falling interest rates and fiscal consolidation efforts in other countries have curtailed the worsening trend to some extent.*

*13. Prospects for a recovery crucially depend upon a further monetary easing and the self-stabilising properties of market economies, as private-sector confidence picks up. However, any upswing will probably be slow and moderate in strength because of the following growth constraints: tight monetary conditions, weak competitive position, rising unemployment, depressed business and consumer confidence and, more recently, announced or projected fiscal consolidation efforts.*

*14. The expected pick-up in economic activity is likely to be driven by investment and exports. In 1994, private consumption will remain weak, albeit returning to a positive growth rate of about half a percent. Investment is expected to grow by 2% in 1994, while exports could show an increase of about 3 1/2% ( compared with the falls of about 4 1/2% and 2% respectively last year). But the effect of the expected one percent increase in domestic demand on GDP growth for 1994 will be dampened by the expected smaller contribution of the foreign balance than a year earlier.*

*Unfortunately, the expected pace of the upturn is insufficient to avoid a further fall in employment and a corresponding rise in the rate of unemployment in 1994. Employment may fall further by half a percent , while the rate of unemployment will continue to rise to slightly more than 11% on average for 1994. Only a marginal improvement is expected on the fiscal front in 1994, with the budget deficit coming down to around 6% of GDP for the Community as a whole.*

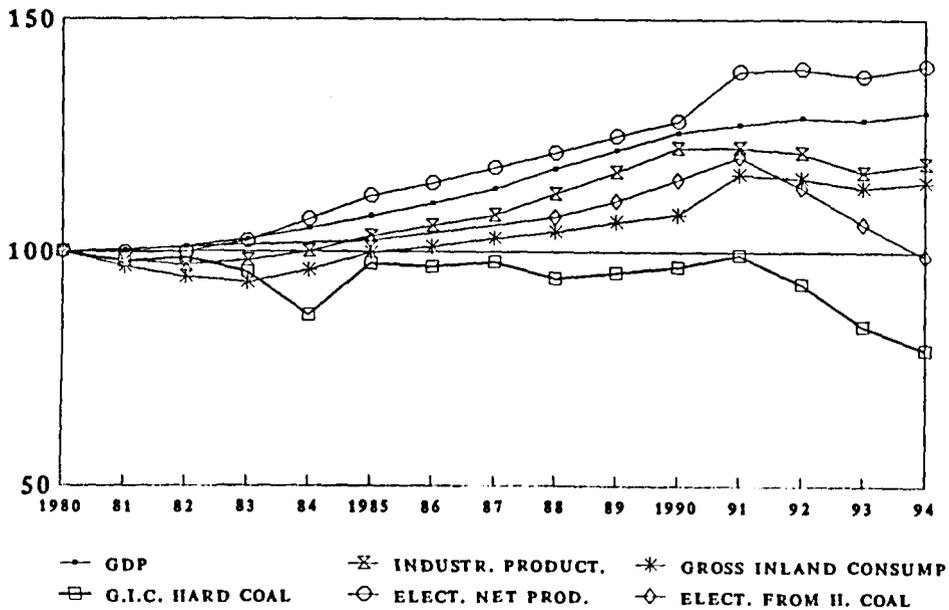
*The only bright spot concerns inflation as visible progress was achieved in 1993 and further downwards pressure is expected in 1994. Under the combined impact of recessionary forces and the tight stance of monetary policy, inflation (deflator of the private consumption) edged down from 4.6% in 1992 to around 3.8% in 1993 and could fall further to 3 1/4% in 1994. Enhanced moderation in wage developments as well as success in preventing a resurgence of inflationary pressures in those countries whose currencies depreciated in the wake of the September 1992 ERM turmoil largely account for the better-than-expected inflation performance in 1993.*

#### IV. DEVELOPMENT OF THE COMMUNITY ENERGY MARKETS

15. According to the data available at the time of writing (covering the first 9 or 10 months of 1993), total primary energy demand in terms of gross inland consumption, in the Community, during 1993 is likely to have decreased by more than 1% compared to 1992. The Commission services are still working on the forecasts for 1994 but, bearing in mind the expected recovery of the economy, energy demand could increase by between 1 and 1.5%.

16. Crude oil CIF prices for imports into the Community decreased by some 12% during 1993 compared to 1992. The average imported crude oil price for 1993 is likely to have been around 16.2 US dollars/barrel, according to the first estimates, against 18.4 US dollars/barrel during 1992.

TRENDS OF VARIOUS PARAMETERS  
ENERGY - ECONOMY (1980 = 100)

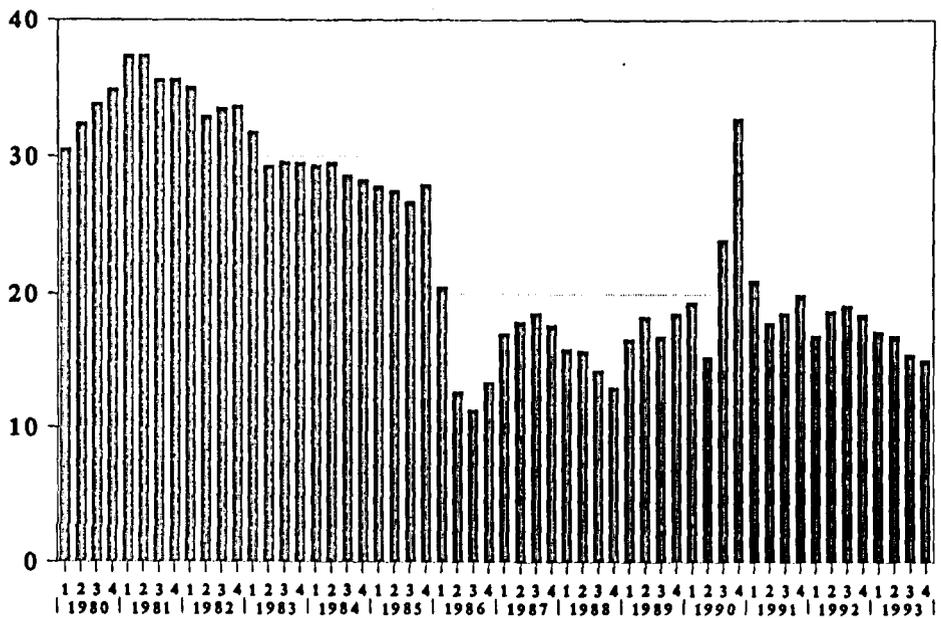


\* G.I.C.: GROSS INLAND CONSUMPTION  
\*\* INCLUDING NEW GERMAN LÄNDER FROM 1991

17. The main factor which explains the changes in the growth of demand between 1991 and 1993 is the decrease in economic growth and, therefore, in industrial production (which may have decreased by about 3% during 1993 compared to the already disappointing performances of 1991 and 1992).

18. The demand for oil, in terms of total inland deliveries, increased by 1.3% during 1992 but may have dropped by some 1% in 1993. This decrease is largely due to the lower demand for heavy fuels due to the lower industrial demand.

### IMPORTED CRUDE OIL US\$/barrel



19. Demand for natural gas is expected to have increased by some 4% during 1993, due mostly to the higher demand from power stations.

20. The total demand for solid fuels, in terms of gross inland consumption, may have declined by 10% during 1993 compared to 1992. Of this, some 80% was accounted for by hard coal and the rest by lignite. For 1994, a further decline of some 4% is expected.

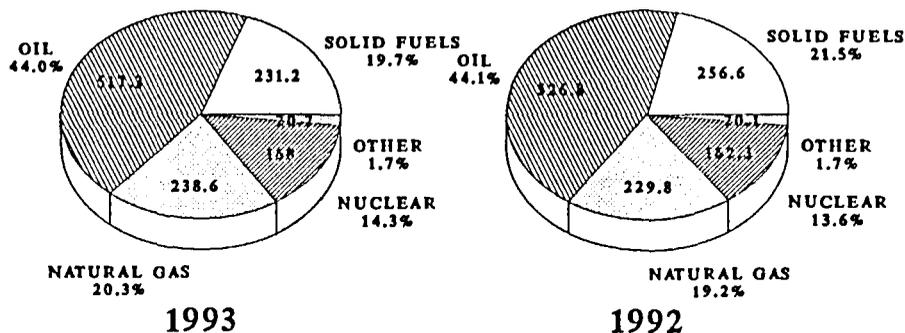
The demand for hard coal may have fallen by some 11% during 1993. This fall is more noticeable since it follows the 5% drop registered in 1992 from the peak reached in

1991 (which was the highest total since 1982). Demand from all the consuming sectors decreased significantly during 1993 and 1994 is expected to show a further decrease of 6%, principally as a result of the decrease in demand from the power stations and the steel industry.

With respect to lignite, the overall figures are seriously affected by the restructuring of the lignite industry in the new German Länder. However it is anticipated that the decrease will now bottom out. Total Community demand is therefore expected to have fallen by 5.9% in 1993 and by only fall by a mere 0.7% in 1994.

### SHARE OF THE VARIOUS FORMS OF ENERGY GROSS INLAND CONSUMPTION (Mtoe)

---



21. Electricity demand, measured by the gross inland consumption, has probably decreased by more than 1% in 1993. This trend could be reversed during 1994 as a result of the expected moderate economic recovery.

The production of nuclear electricity may have increased by some 5% in 1993, largely as a result of higher production in France and in the United Kingdom This would represent a displacement of some 8.5 Mt of hard coal.

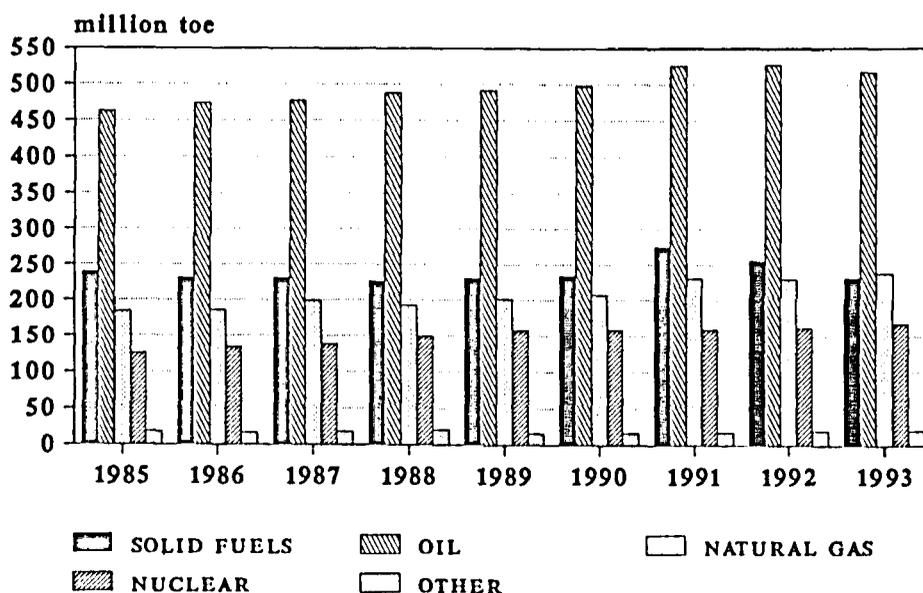
Hydro-electric production, on a Community level, may have seen no significant change during 1993 with respect to the previous year. However by individual countries there have been wide variations.

Production of electricity by conventional thermal power stations may have finally decreased in 1993 by more than 5%. Demand for hard coal from power stations has been affected by the decrease in the total electricity produced, but also by the increasing production from nuclear and natural gas.

22. With respect to energy supply, total Community energy production in 1993 has probably decreased by 6 Mtoe to 599 Mtoe, mainly as a result of the decrease in production of solid fuels.

Total net imports probably represented about 51.8% of total apparent gross consumption in 1993.

### PRIMARY ENERGY BALANCE GROSS INLAND CONSUMPTION



\* Including new German Länder from 1991

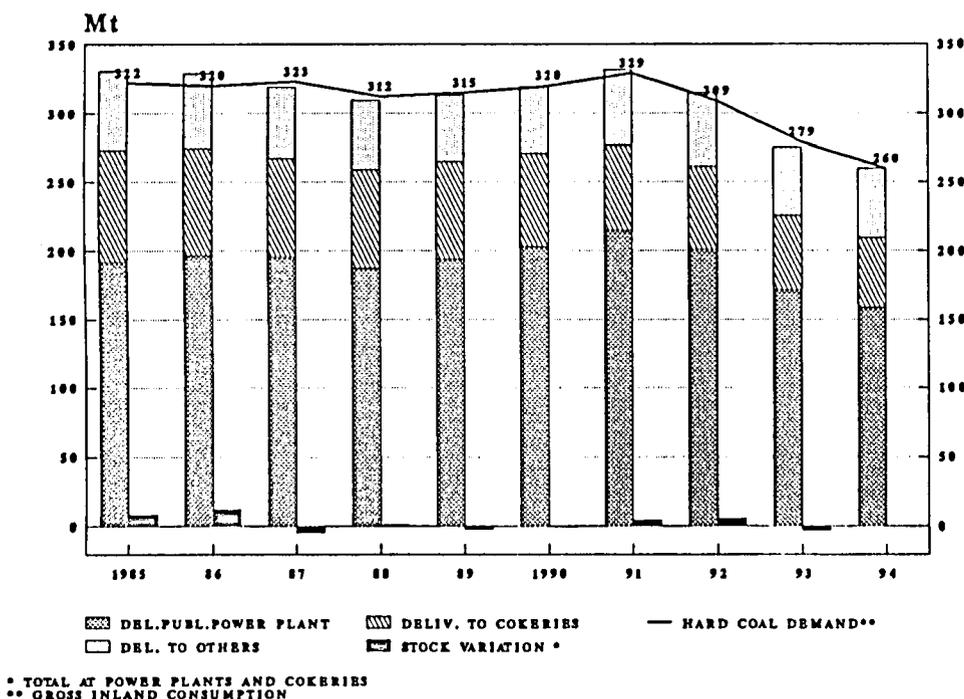
## V. DEMAND FOR SOLID FUELS

### Deliveries of hard coal (Table 3)

23. Deliveries of hard coal in the Community fell significantly in 1993 compared to 1992. Internal deliveries were 275.2 Mt, which is 39.2 Mt (-12.5%) lower than that for the previous year, according to the latest estimates. This is one of the lowest figure ever registered in the Community.

Deliveries to all sectors have seen a decline, with the only exception being deliveries of thermal coal to the steel-making industry. In absolute terms, the main decreases were in the deliveries to the electricity generating industry (down 29.8 Mt, or -14.1%), deliveries to the cokerries (down 6.6 Mt, or -11.0%), deliveries to the "other industries" (down 1.9 Mt, or -8.9%; excluding their own power-generating requirements) and deliveries to the domestic heating sector, down by some 0.9 Mt (or -8.6%).

### TREND IN HARD COAL DELIVERIES

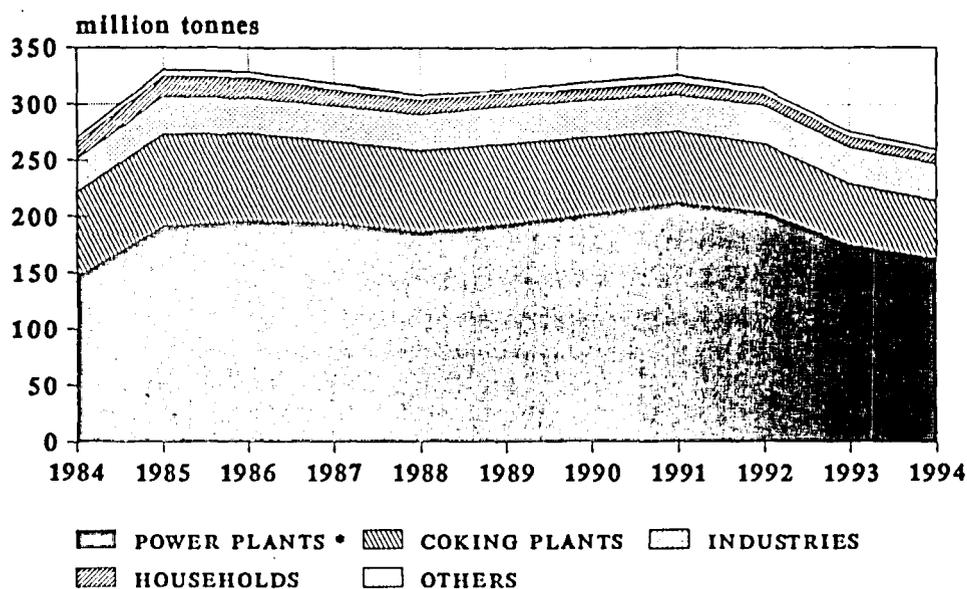


The share of hard coal deliveries for electricity generation has moved down from 67.2% of total deliveries during 1992 to slightly less than 66% in 1993. However, it should be noted that the deliveries to the main sectors, which are electricity generation (including colliery and industrial power stations) and cokerries, still account for some 85.4% of the total.

The countries with the most significant decreases were the United Kingdom with a drop of 19.5 Mt (-19.2%), followed by France with a decrease of 9.0 Mt (-29.0%), Germany with a fall of 6.7 Mt (-8.2%), and Denmark and Spain with a drop of 1.6 Mt (-13.1%) and 1.1 Mt (-3.2%) respectively. On the other hand, only three countries saw any increase, but altogether only account for 1.1 Mt.

24. For 1994 the volume of internal hard coal deliveries in the whole Community is expected to fall again by 15.6 Mt (-5.7%), compared to the 1993 figures, to reach 259.6 Mt. By sector, the forecasts are for a generalised decrease, with the only exception being deliveries of thermal coal to the steel industry for PCI (Pulverised Coal Injection) purposes and deliveries to "other industries" which are expected to remain roughly steady. The most significant fall is forecast for electricity generation, with a decrease of 13.1 Mt (-7.2%) to 168.5 Mt, followed by deliveries to cokeries with a drop of 2.6 Mt (-4.9%) to some 50.8 Mt.

## INLAND DELIVERIES OF HARD COAL



\* Public and pithead power stations

\*\* Including new German Länder from 1992

*A comparison with 1993, by country, reveals no major variations forecast, with the exception of the anticipated decreases in the United Kingdom (-15.2 Mt; -18.5%) and in Germany (-2.0 Mt; -2.6%). On the other hand, the Netherlands is expected to increase its deliveries by 1.2 Mt (+9.2%). Other variations are less than 1 Mt.*

#### *Coke-making (tables 4 and 5)*

*25. Since the beginning of 1991, the steel industry has been going through a difficult period during which the market conditions have significantly deteriorated.*

*As with energy demand, the downturn in this market is partly caused by the weakness of the general economic situation, which has led to a contraction in the demand for steel.*

*26. Crude steel production in 1993 may have reached some 132.4 Mt, which represents an increase of 0.3 Mt on 1992. However, during the same period, real steel consumption is likely to have fallen further by around 7%.*

*The very sharp increase in exports to China have helped, to some extent, to revive Community production and imports were less significant in the Community market.*

*27. With the modest growth expected in the European economies in 1994, together with the recovery in the United States and the poor economic performance of the Japanese economy, no significant improvement in the situation can be expected in the first half of the year. However, a slight improvement might come about in the second half of 1994 alongside a better-targeted industrial activity and an upswing in exports. Thus, for 1994 as a whole, there might be a stabilisation of consumption at 116.5 Mt, a decrease of around 13% in exports and a cut in production totalling 126.5 Mt (which is 4.4% down on the 1993 figure).*

*28. In recent years, about 90% of the coke consumed in the Community has gone to the steel industry, mainly for use in the blast-furnaces. However, the running of these furnaces has undergone a number of technical modifications and improvements which have tended to reduce the amount of coke required for the production of pig-iron. Cheaper and lower quality steam coal is now increasingly being injected into the blast furnaces. This has the advantage of not being burdened with the relatively high costs involved in producing coke. This evolution, together with other techniques being used*

to increase the efficiency of the blast-furnaces, has already resulted in a substantial reduction of the specific consumption of coke per tonne of pig iron.

The slow-down of activity in the Community's steel industry, together with the considerable changes which are taking place in steel-making technology, are leading to reduced requirements for coke and hence for coking coal, as well as to a lower input of coal per unit of steel output. Coal usage in this sector will therefore continue to be curtailed and only deliveries of steam coal for injection into blast furnaces, as a partial substitute for coke, will increase in the coming years.

29. Deliveries of coke to steel plants have decreased by 3.5 Mt (-8.9%) in 1993, compared to 1992, to a level of 35.9 Mt. For 1994, no changes with respect to the trend observed in 1993 are expected since deliveries are forecast to be some 1.1 Mt down (-3.0%) at 34.8 Mt. However, it should be highlighted that the forecast decrease is some three times lower than that registered for 1993.

30. The remaining internal coke deliveries totalled barely 4.5 Mt in 1993, which represents a drop of 0.3 Mt with respect to the previous year (-6.1%). Exports also slightly declined (-3.0%). For 1994, all the indicators points to a further decrease of about 4.4% to 4.3 Mt.

#### Power stations (Tables 6A and 6B)

31. On the basis of the information available at the time of writing, the drop in demand in the whole Community for electricity, in terms of gross inland consumption, may have been higher than 1% in 1993.

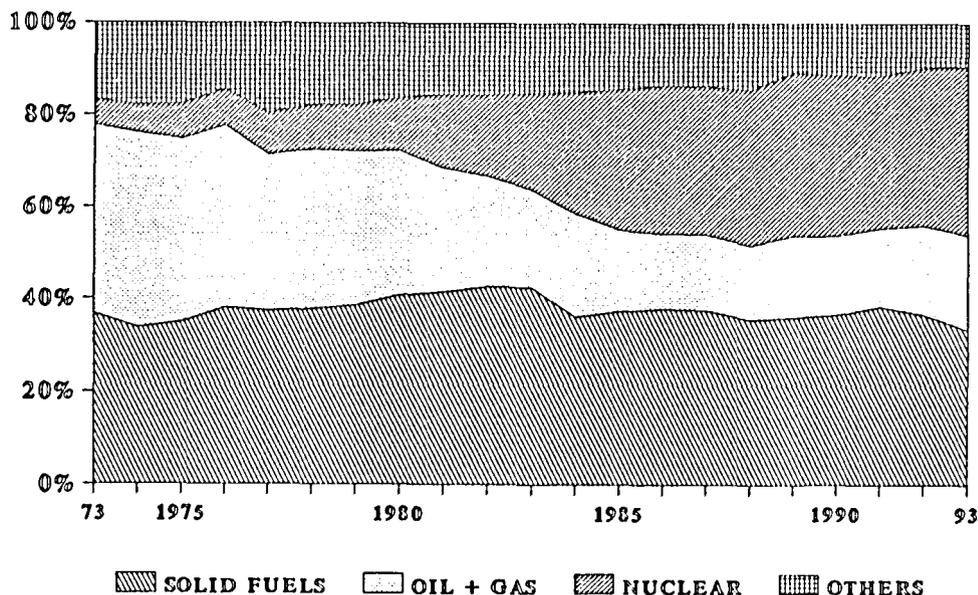
By sources, nuclear generation may have grown by some 5%, whilst that generated by conventional power stations may have decreased by same proportion.

On the other hand, hydro-electric generation may have seen little significant change with respect to the previous year, although with notable variations between individual countries. In fact, the increases accounted for in Spain and Portugal have been offset by the decreases in France and Italy.

As an example, the above-mentioned variations in electricity demand and in nuclear generation would represents almost 7 Mt less coal if the lower demand had exclusively affected the hard coal-fired plants, and 8,5 Mt less coal if the nuclear had displaced

coal. In addition, generation from gas-fired plants could have increase by an equivalent of 13 Mt of coal.

### ELECTRICITY GENERATION BY SOURCE



\* Including new German Länder from 1991

With respect to the conventional power stations, the electricity generated from hard coal may have decreased by more than 8% whilst that from lignite by around 5%. On the other hand, electricity generated from the gas-fired power stations may have increased by some 8%.

32. The most recent yearly figures concerning the share of the different energy sources used for the generation of electricity ( including auto-producers), for the whole Community, are those for 1992:

SOURCE	%	%
HYDRO	9.6	
NUCLEAR	34.4	
CONVENTIONAL	55.9	
of which:		
Hard coal		47.9
Lignite		17.5
Liquid fuels and refinery gases		19.0
Natural gas and gasworks gas		12.2
Others ( including coke oven and blast furnace gas)		3.4
OTHERS	0.2	

33. In 1993, hard coal deliveries to public power stations were down by 29.1 Mt (-5.1%) on the previous year at 171.9 Mt. By Member State, only the Netherlands, Portugal and Greece saw a certain increase in deliveries (altogether in the order of 1.0 Mt). On the other hand, the biggest decreases in absolute terms are expected to have been in the United Kingdom (19.0 Mt), in France (7.3 Mt), in Germany (1.2 Mt) and in Denmark (1.0 Mt).

Moreover, during 1993, stocks at the public power stations have only decreased by 1.0 Mt to reach a new level of 73.8 Mt (by the end of October 1993), compared to 74.9 Mt in 1992. The main variations in stocks were in the United Kingdom (1.1 Mt down), Germany (some 1.1 Mt down) and in France (more than 1 Mt up).

Examining those countries with the highest variations in hard coal deliveries to public power stations, the following can be noted:

- In the United Kingdom, deliveries of hard coal to the electricity generating industry over the last few years have been at a higher pace than the consumption, to the extent that stocks have risen substantially to the current level of more than 31.4 Mt (in November 1993). Based on the latest information available at the time of writing (the first nine months of the year), the estimated drop in electricity demand of the order of some 2.8%, together with the improvements in the nuclear electricity generation of around 17%, have led to a displacement of almost 2.5 Mt and 3.0 Mt of hard coal respectively. Also, natural gas consumption has significantly increased in the order of some 8 Mtoe, with respect to the previous year, which would be the equivalent of some 13 Mt of coal.

- In France, total electricity demand may have slightly decreased in 1993 with respect to the previous year. On the other hand, electricity generated from nuclear plant could have increased by some 8%, which represents roughly the displacement of some 6.5 Mt of coal.

- In Germany, 1992 had seen an increase of some 0.8 Mt in stocks of hard coal at the power plants. In 1993, whilst deliveries may have decreased by 1.2 Mt, stocks at the power plants may also have decreased in the same proportion, as compared to 1992. If so, this would mean that, despite a drop in hard coal deliveries, the real levels of coal consumption in the power plants may have been higher in 1993 than in 1992.

34. For 1994, the forecasts for hard coal deliveries to the public utilities for the Community as a whole point to a new drop of 13.2 Mt (-7.7%).

*This fall is mostly due to the changes in the United Kingdom's electricity generation industry, with expanding programmes of natural gas-fired plants to the detriment of coal-fired plants. Total deliveries in the United Kingdom are forecast to decrease by 15 Mt (-25%) to some 45 Mt during 1994.*

*When excluding the United Kingdom from the picture, total deliveries to the remaining Community countries are forecast to increase by 1.8 Mt (1.6%). The main increases are forecast in the Netherlands (+1.7 Mt; or +22.0%) and in France (+1.0 Mt; or +25.0%). Other variations are usually no higher than 0.5 Mt.*

*35. With respect to deliveries to collieries power stations and auto-producers, total hard coal deliveries may have fallen by 0.6 Mt (-6.1%) during 1993 to a total of 9.7 Mt. Deliveries for 1994 could remain steady or slightly increase.*

#### *Other industries (Table 7)*

*36. "Other industries" covers a variety of industries. The most important for the potential consumption of hard coal is the cement industry and, to a lesser extent, the chemical, sugar, paper and ceramic industries.*

*However, the negative growth of the Community in 1993, which has led to a decrease in the general industrial activity, and the low prices for alternative fuels such as oil and natural gas could be the reason for a loss of penetration for coal in this sector.*

*For the Community as a whole, hard coal deliveries to this sector, excluding own power generation, may have fallen by some 1.8 Mt (-8.9%) in 1993, when compared to 1992, to a new level of 18.9 Mt. This decrease is fairly general for all of the Community countries, to a greater or lesser extent, although the sharpest decreases in absolute terms have been recorded in Spain, Germany and Denmark in relation to the previous year.*

*37. In 1994, the volume of hard coal deliveries to this sector is expected to stabilise or to increase slightly, since the forecasts are for a very small increase of 0.4%. The main increase is anticipated in Spain (+0.7 Mt; +36.5%).*

Domestic use (Table 8)

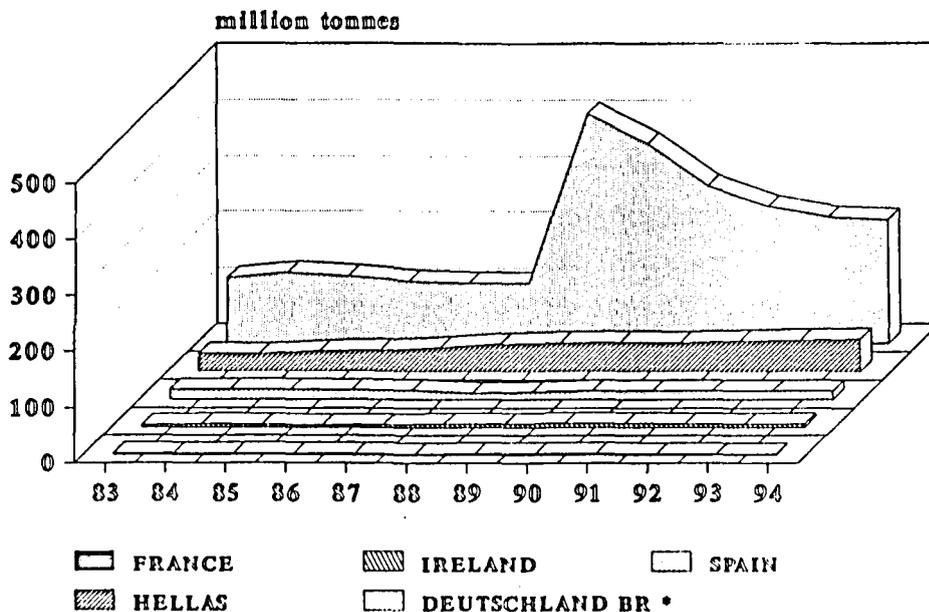
38. The fall in consumption of solid fuels in this sector is undoubtedly one of the most pronounced. This market is declining steadily and is showing no signs of stability in the near future. The loss of sales is not due solely to the weather conditions of recent years and the competitive prices for alternative fuels but also, in many cases, to environmental regulations which tend to discourage the use of solid fuels, especially in urban areas, in favour of other fuels considered to be more environmentally friendly.

Deliveries of hard coal for domestic consumption, including supplies to miners' families, fell to 9.3 Mt in 1993 from 10.2 Mt in 1992 (which represents a fall of some 8.6%).

Patent fuel, coke and lignite briquette deliveries also continue to decline steadily.

Total solid fuels deliveries to this sector, including hard coal, patent fuels, coke and lignite and peat briquettes, were 21.9 Mt in 1993, as against 23.8 Mt in 1992 (down some 8.3%) and a further reduction to 1.0 Mt is forecast for 1994.

**DELIVERIES OF LIGNITE AND PEAT**



\* Including new German Länder from 1989

### ***39. Deliveries of lignite and peat (Table 9)***

*Total internal deliveries of lignite and peat decreased during 1993 to a new total of 305.1 Mt, which is some 19.0 Mt down on the previous year. This was largely due to the decrease in deliveries to power stations (-23.5 Mt), since deliveries to briquetting plants and other sectors rose by 2.6 Mt and 1.9 Mt respectively to a total of 46.2 Mt and 23.5 Mt.*

*The main decrease of 19.9 Mt was seen in Germany, of which some 12.2 Mt corresponded to the new Länder and 7.8 Mt to the old Länder, due in a large extent to the lower demand from power plants. On the other hand Greece saw an increase in its total deliveries by some 1.5 Mt.*

*40. The forecasts for 1994 show that deliveries are likely to fall somewhat (2.1 Mt; -0.7%). This is mainly due to the anticipated decrease in demand from the "others" sector and the briquetting plants in Germany (by around 3.3 Mt and 0.7 Mt respectively). On the other hand, the demand from the utilities in Greece could increase by 1.9 Mt during 1994. No changes are forecast in the other Member States with respect to 1993.*

## VI. COMMUNITY SOLID FUEL PRODUCTION

### Hard coal (Table 10)

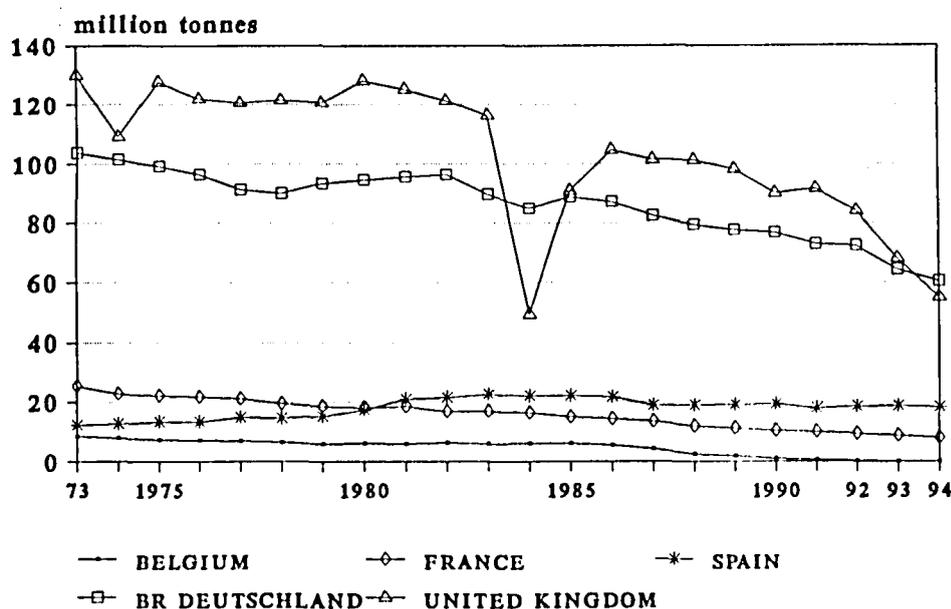
41. Community hard coal production in 1993 continued to be affected, to varying degrees, by the Member States' policies to restructure, rationalise, modernise and improve their competitiveness. Production decreased by 24,3 Mt (-13.2 %) in 1993, with respect to the previous year, to 160.3 Mt.

The most significant changes for individual countries were to be seen in the United Kingdom with a drop in production of some 15.9 Mt (-18.9%), followed by Germany with a decrease of 7.9 Mt (-10.9%) and France with a drop of 0.6 Mt (-6.8%). On the other hand, hard coal production in Spain may have rise by 0.2 Mt, due mainly to the increased production from the open cast mines which more than offset the fall in underground production.

42. 1994 is likely to see similar developments with a drop in total Community production of some 17.9 Mt (-11.2%), with respect to 1993, to attain 142.3 Mt.

Once again, the most significant decrease is expected in the United Kingdom with 13.0 Mt (-19.1%), followed by Germany with around 3.9 Mt (-6%), France with 0.6 Mt (-7.1%) and, finally, Spain with 0.4 Mt (-2.2%).

### HARD COAL PRODUCTION

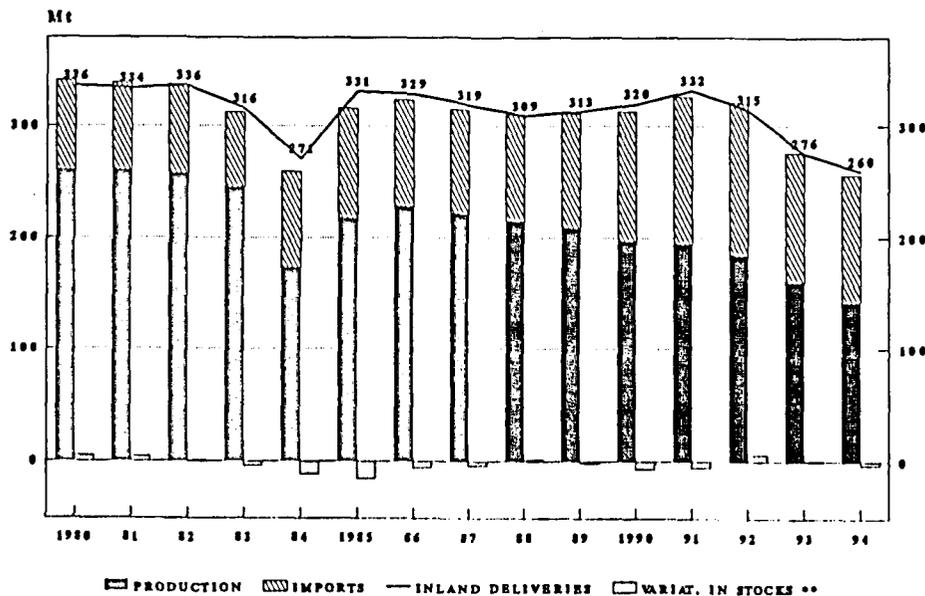


43. In the United Kingdom there were further pit closures under the restructuring programme which began in 1985. At the end of 1993, British coal had 22 pits in operation compared to 50 in October 1992 when British Coal announced the package of closures. More collieries are scheduled to be closed in the coming year, given the expected drop in production.

In early December 1993, the United Kingdom's Coal Bill was published. This can be interpreted as the official start of the process that will result in the eventual break-up of British Coal. Further restructuring will continue as the industry moves to compete with coal coming from the international market.

The privatisation legislation is currently being debated by the parliament. It is expected to be completed by mid-1994. This means that the whole United Kingdom coal industry should be in the private sector some time next year. It is expected that British Coal will be split into five separate regions: Scotland, the north east, Wales, Yorkshire and Midlands and that each of these will offered for sale.

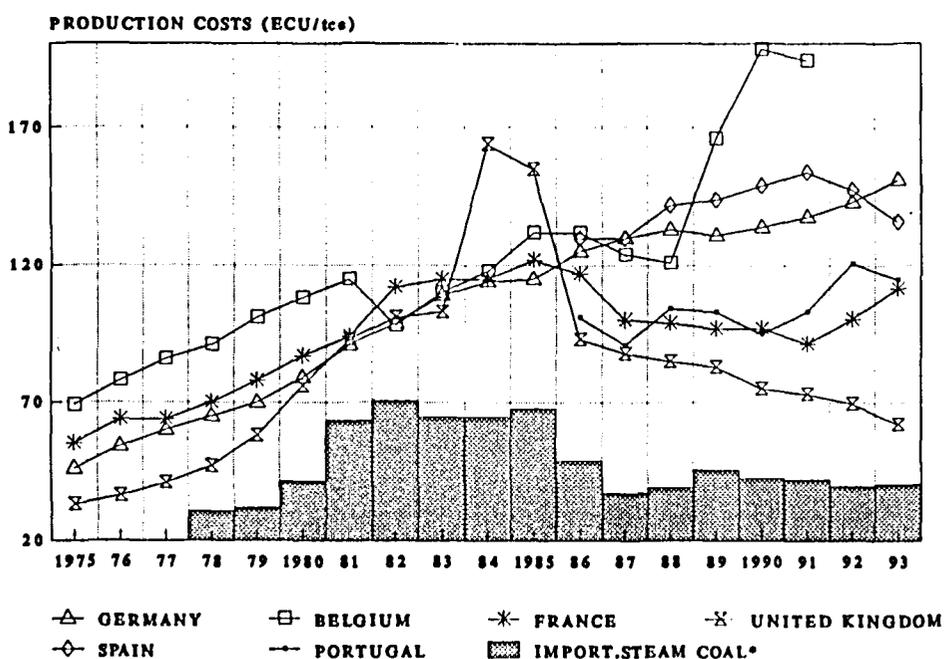
### TREND IN PRODUCTION AND IMPORTS OF HARD COAL



\* INCLUDING NEW GERMAN LÄNDER FROM 1991  
 \*\* AT COAL SUPPLIERS

44. In Spain further closures of underground mines and the restructuring of others took place during 1993 as result of the four year restructuring plans which ended on 31 December 1993 and which affected both the private and public coal mining sectors. The three year plan allowed approximately the same level of total output to be maintained, despite the fact that almost 100 pits were closed and some 12000 to 13000 workers left the coal industry.

### COAL INDUSTRY COST TRENDS



\* CIF

45. Production cuts in Germany have principally affected the Ruhr and Aachen coalfields. In 1993, production in the Ruhr fell by 5.7 Mt (-10.0%) compared to 1992, whilst the Aachen coalfield saw production fall by 1.8 Mt (-52.5%).

For 1994, the expected cutbacks will mostly affect the Ruhr coalfield (-3.4 Mt; or -6.7%). The "Monopol" mine will close, cutting 1 Mt production, whilst the "Heinrich Robert" and "Hugo/Consolidation" mines will partially close, cutting a further 1 Mt each.

### Lignite and peat (Tables 9, 26 and 27)

46. Lignite production and consumption are intimately linked to the generation of electricity (some 77% of available resources for the whole Community, and 89% when excluding the new German Länder). Lignite production in 1993 is estimated to have been some 302.1 Mt, which is 18.9 Mt (-5.9%) less than in the previous year. This is due to lower production in Germany (-19.2 Mt), since Greece may have increased production by almost 1 Mt.

For 1994, total lignite production is forecast to decrease by 2.2 Mt (-0.7%) to around 300.0 Mt. Only Greece expects to increase lignite production by 2.0 Mt to attain 58 Mt, whilst Germany believes that its lignite production will fall by some 4.1 Mt to reach 218.5 Mt.

47. The production of lignite briquettes in 1993 is estimated at 14.7 Mt, compared with 22.4 Mt in 1992. Germany produces around 97% of the total tonnage, of which roughly 2/3 are in the new Länder and the remaining 1/3 in the old Länder. For 1994, forecasts are for a small decrease (0.4 Mt) in comparison with previous years.

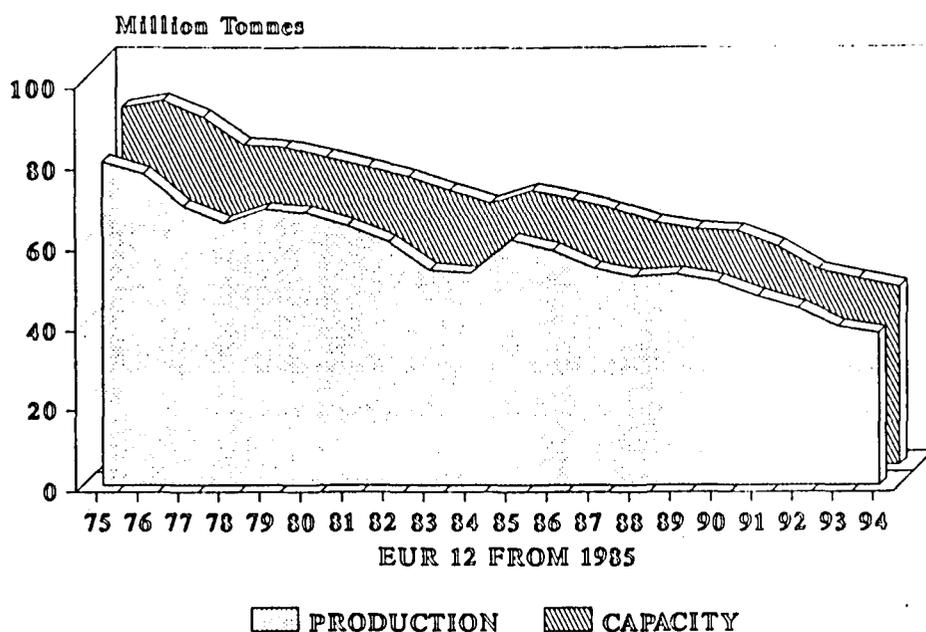
48. According to the forecasts for 1994, the lignite industry in the new German Länder is displaying signs that it is touching the bottom of the restructuring carried out since reunification.

To have an idea of the magnitude of the restructuring carried out over the last four years, it has to be pointed out that total production has been cut by 185.2 Mt and employment by 101,000. Employment in the industry at the end of 1993 is estimated at some 38,000.

### Coke (Tables 11A and 11B)

49. Total Community coke production capacity in 1993 is estimated to have totalled 47.0 Mt, as compared to 51.3 Mt in 1992, whilst the forecast for 1994 is for 45.8 Mt. On the other hand, actual coke production in 1993 was 39.5 Mt (-4.6 Mt; -10.5%). This continues the steady decline which has been observed over the past few years. For 1994, all indicators point to a further reduction of 1.7 Mt (-4.4%) to a total of 37.8 Mt. Moreover, the coke-production/nominal-capacity ratio is deteriorating from some 87% in 1992 to 84% in 1993 and 83% in 1994.

## COKE PRODUCTION AND CAPACITY



*With the reduction in activity in the steel industry, which absorbs some 90% of the coke available in the internal market, together with the structural and technological changes which are also taking place within the Community's steel industry, there will inevitably be a decline in the requirement for coke. It is not surprising therefore that coke production is in continuous decline.*

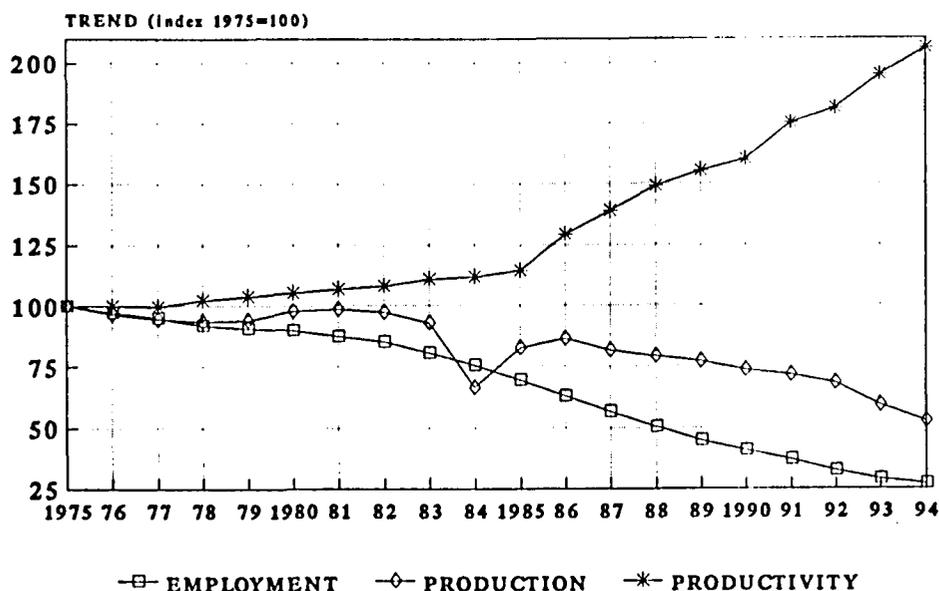
### Labour and productivity (Tables 12A and 12B)

50. *The annual average Community underground workforce fell once again by some 17,800 (or 12.1%) in 1993, compared to the 23,500 jobs lost in 1992, to a new total of around 129,600. Germany and the United Kingdom each accounted for roughly one third of the losses, and Spain for about a quarter of the losses.*

*The forecasts for 1994 point to new losses. However, at the time of writing it is extremely difficult to estimate the job losses at a Community level since this will be heavily influenced by the final outcome in the United Kingdom. However, bearing in mind the production forecasts for 1994, job losses could be at least of the order of some 10,000.*



## TREND OF THE COAL INDUSTRY (EUR-12) EMPLOYMENT, PRODUCTION AND PRODUCTIVITY



### State aids

52. *Financial aid from the Member States to the hard coal industry is discussed in a separate report, so only a brief summary of the financial aid to current production authorised by the Commission is given here.*

	TOTAL INTERVENTION (MECU)			INTERVENTION PER TONNE (ECU)		
	1991	1992	1993	1991	1992	1993
<i>Belgium</i>	61.2	40.9	-	96.7	187.6	-
<i>Germany</i>	4502.7	4497.7	4307.5	61.9	62.3	67.0
<i>France</i>	165.3	186.9	190.2	16.4	19.7	21.5
<i>Spain</i>	667.4	463.3	373.3	36.7	24.2	19.8
<i>Portugal</i>	4.5	5.8	6.4	19.4	26.4	29.1
<i>United Kingdom</i>	-	-	-	-	-	-
<i>Total</i>	5401.1	5194.6	4877.4	28.0	28.1	30.4

53. With respect to State aid to the coal industry, it should be noted that new State aid rules for the coal industry came into force on 1st January 1994 (Decision No 3632/93/ECSC<sup>(2)</sup>). These will expire on the 23 July 2002, at the same time as the ECSC Treaty itself.

The main principles and criteria which have inspired the new State aid Decision are :

- Firstly, to procure a degressivity of the aid given to the coal industry. This is to be achieved by making progress towards economic viability, in the light of the coal prices on the international markets;
- Secondly, to improve the transparency of the aid. This is addressed as much to identifying the aid as to the actual methods of financing and will be achieved, after a transitional period of not more than three years, by the inclusion of all aid in public budgets or strictly equivalent mechanisms.
- Thirdly, to provide a proper framework to enhance the restructuring plans;
- and finally, to obtain the inevitable capacity reductions whilst taking into account the necessity of addressing the social and regional problems associated with the restructuring process.

Therefore, only the following types of aid would be authorised under the new rules:

- operating aid;
- aid for the reduction of activity;
- aid to cover exceptional costs;
- aid for research and development;
- aid for environmental protection.

All the aid for current production by units and/or undertakings moving towards economic viability, in the long term, would be classified in the single category of "operating aid".

Member States which intend to grant operating aid to coal undertakings in the course of the period 1994 to 2002 shall to submit to the Commission, in advance, a modernisation, rationalisation and restructuring plan designed to improve the economic viability of the undertakings concerned by reducing production costs.

---

<sup>(2)</sup> O J. L 329 of 30.12.93, p. 12.

*Aid to cover the production costs of those undertakings which are unable to improve their economic viability could be granted if they are the subject of a closure plan with the deadline occurring before expiry of Decision. However, should such a closure come about after the expiry of the Decision, aid to cover production costs could only be authorised on exceptional social and regional grounds, and would nonetheless be the subject of a progressive and continuous activity-reduction plan entailing a significant reduction in capacity before the expiry of the Decision.*

**Investment trends (Table 13)**

*54. First estimates indicate a rise in investment compared to previous year. For the Community as a whole, investments are expected to have been some 730.3 MECU in 1993, which represents an increase of 11.9% in relation to the previous year. Whilst Germany increased its investment in 1993 by 157.2 MECU compared with the previous year, UK investment is expected to have fallen by 23.8 MECU.*

*For 1994 a decrease is forecast to 480.6 MECU. The biggest decreases, in absolute terms, are expected in Germany (down by 108.1 MECU) and, to a lesser extent, in the United Kingdom and Spain with drops of 73.1 and 66.8 MECU respectively.*

*The reasons for these decreases are linked to the closure, or planned closure, of many workings and cutbacks in production capacity. In other cases, they are due to the completion of large investment projects.*

## VII. SOLID FUEL PRICES

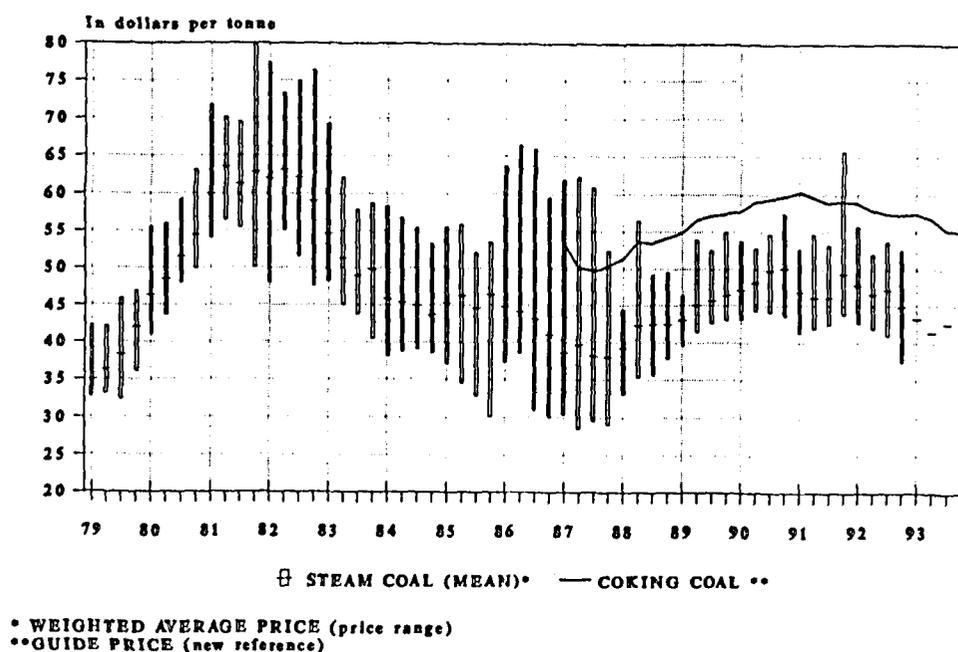
### Exchange rate (Table 14)

55. The value of the US dollar increased compared to Community currencies during 1993. This trend was the opposite to that displayed in 1992. The US dollar's average appreciation with respect to the ECU was of the order of some 10% in 1993 compared to 1992, with the biggest appreciation occurring during the fourth quarter of 1993.

### Trend of imported coal prices

56. World coal prices are continuing to fall steadily in real terms as a result of an oversupply on the market which has been aggravated by the lower demand caused by the economic stagnation.

### MEAN CIF PRICES FOR HARD COAL IMPORTED FROM THIRD COUNTRIES



This fall could have even been more accentuated, but for a certain disruption of exports from United States as result of the strike in the United States' coal industry. This resulted in a slight upward movement of prices in the second half of the year since it pushed some buyers to turn to other suppliers.

*The world coking coal trade has been affected in 1993 by the lower production levels of the Japanese steel industry and the poor performance of the Community's steel producers.*

*The world trade in steam coal, despite benefiting from the decline in output of a number of key coal producing countries, was affected by the decreased demand for imported coal in the Community and the weakening of the increase in demand from Japan which are the two most important importers of coal in the world.*

*57. Both coking coal and steam coal CIF prices declined during 1993 with respect to the prices quoted in the previous year. On average, CIF prices in US dollars for steam coal were 9.2% lower in the first three quarters of 1993 with respect to the same period in the previous year, whilst for coking coal qualities the average CIF prices for Community imports in 1993 were 3.0% lower than in 1992.*

*It is important to note that the ratio between coking coal and steam coal CIF prices for Community imports have risen from some 1.11 in 1992 to 1.19 for the first three-quarters of 1993.*

**(a) Coking coal (Tables 15A and 15B)**

*58. Coking coal prices on the international market have been declining since the peak reached in the first quarter of 1991. Information available on recent contracts for 1994 are for a certain discount with respect to 1993 prices, probably because demand in 1994 is not expected to increase.*

*59. The guide CIF price for the major Community ports calculated by the Commission for coking coal imported from the United States, Australia, Poland and Canada under medium- and long-term contracts started 1991 on a downward trend. This has continued during the whole of 1992 and 1993.*

*The guide price per standard tonne for the fourth quarter of 1993 dropped to 55.0 US dollars from the 57.3 US dollars figure reached for the same period in 1992, and from the figure of 60.40 US dollars for the first quarter of 1991.*

*Ocean freight rates, on a quarterly average, declined to a minimum of 6.2 US dollars in the third and fourth quarters of 1993, which is 0.2 US dollars lower than in the*

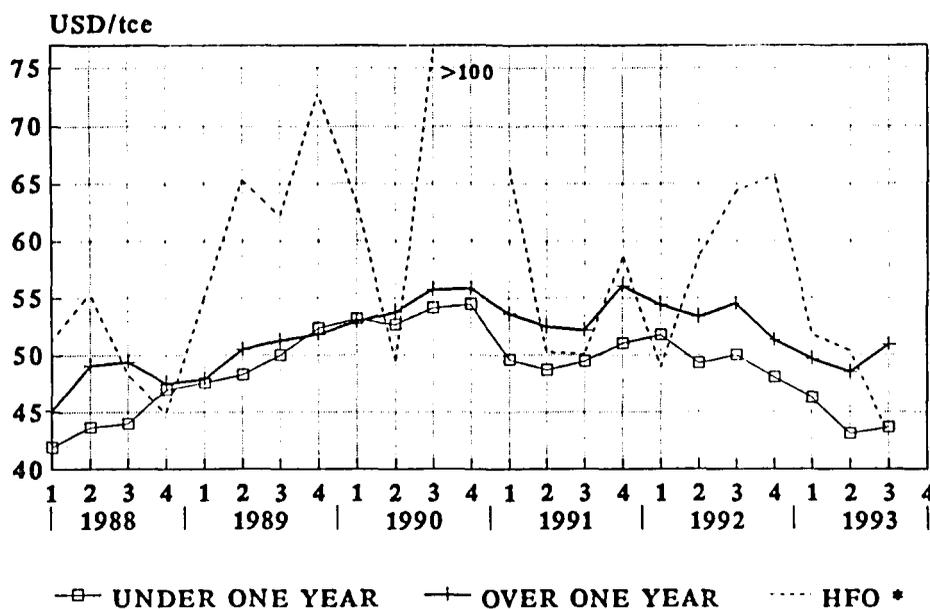
same period for the previous year. On average freight rates were some 6.4 US dollars per tonne in 1993 compared to 6.6 US dollars in 1992 and 8.23 US dollars in 1991.

60. The Commission's guide price calculation was altered on 1st January 1987 in order to adapt the reference quality to the average qualities of the coking coal currently being imported from non-Community countries. Nevertheless, in its publications, the Commission continues to indicate the old guide price that used the previous formula.

**(b) Steam coal (Tables 15A and 15C)**

61. In the third quarter of 1993 the average CIF price, at the major European ports, for steam coal imported from non-Community countries was 47.98 US dollars per tce, as compared with 52.36 US dollars for the same period during the previous year (a decrease of 8.4%). However, since the average US dollar exchange rates for the third quarter of 1993 were 0.82861 ECU and 0.72154 ECU for the third quarter 1992, the real price variation in Community currencies was, in fact, an increase of 5.2%.

**CIF PRICES FOR COAL IMPORTS - EUR 12  
CONTRACT PRICES FOR STEAM COAL**



\* Spot price Rotterdam; 3.5% sulphur

On average, for the first three quarters of 1993, CIF prices expressed in US dollars were 9.2 % lower than in 1992.

The Member States provided the Commission with the figures for steam coal imports in accordance with Decisions 77/707/ECSC and 85/161/ECSC.

## VIII. TRADE IN SOLID FUELS

### Hard coal: world trade and production

62. World hard coal production is estimated to be some 3.44 billion tonnes, which is slightly lower than the production reached during 1992. However, there were regional differences within this general trend.

Community production continued to decline along with that of the Eastern European coal-producing countries, mainly in the former Soviet Union, which are continuing with a general political reorientation and the reorganisation of the mining industry.

Countries with sustained growth in production, such as China, India and Indonesia and others, have roughly offset the falling production of those countries which are rationalising of their coal mining industries (particularly the Community) or which have reduced production, for socio-political reasons or as a result of labour troubles, or a combination of both (such as the CIS and the other Eastern European countries).

63. The world coal trade is triggered by import demand which has been growing steadily. 1993 has therefore been an exception to the trend that has been observed over the last decade, since the world coal trade is estimated to have decreased by 16 Mt to 398 Mt. This reduction has been mainly due to the lower demand for thermal coal qualities but also, to a lesser extent, for coking coal. On the other hand 1994 could see a modest recovery, with some 6 Mt growth forecast.

Some 93% of the total coal trade is transported by sea. Coking coal accounted for 41% of this trade, whilst the rest consisted of the different qualities of hard coal.

According to the first data available, total sea-borne coal trade in 1993 decreased compared to 1992. This was mainly because of the lower demand from the European Community.

64. Intra-regional trade is tending to fall in the main regions. However, the drop accounted for in the North American region was especially marked during 1993. Total regional trade in 1993 is estimated to have been 20% down on the previous year.

65. *In the maritime hard coal trade, which itself represents around 11% of total world hard coal production, the Community, Japan and South-East Asia (consisting of Hong Kong, South Korea and Taiwan) account for something over 81%. In all of these countries, imported hard coal has satisfied the decline in domestic coal production, if it exists, and a significant part of the increasing energy requirements.*
66. *In a global context, the Asia-Pacific region has been continuing to progress not only as a major coal importing area (essentially South Korea, Taiwan and Hong Kong, which act as the locomotives for the increasing coal demand in the region), but also as the main exporting region in the world.*
67. *On the exporters' side, the picture is of a large loss in volumes from the United States and, to a lesser extent, from the CIS. Total coal exports from the United States are estimated to have decreased by 6 Mt for coking coal qualities and 20 Mt for thermal coal qualities. The United States coal industry has been affected by the selective strikes, which ended in mid-December, as the new National Bituminous Coal Wage Agreement was under negotiation during 1993.*

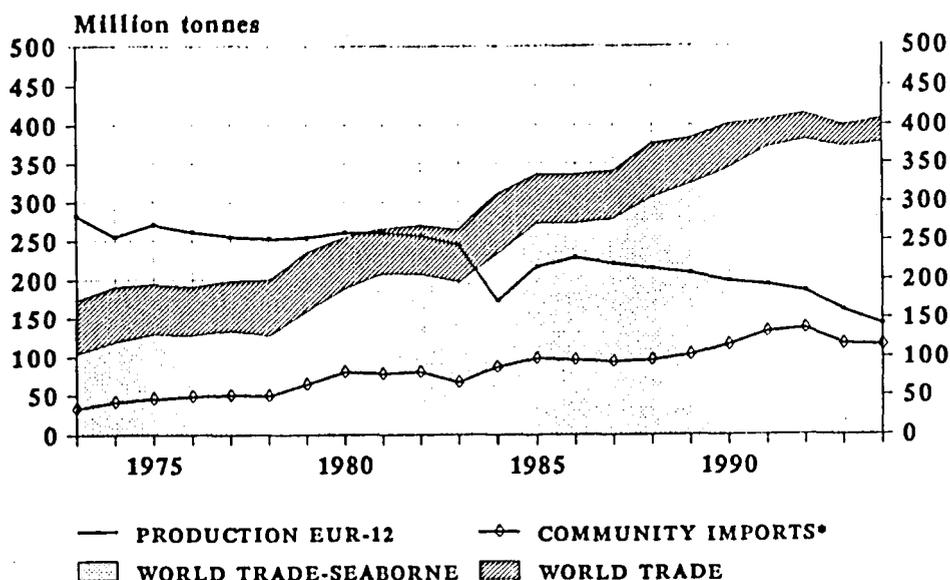
*As a result, some buyers moved to other suppliers and even a certain number of US utilities were in the market for offshore coal or have been purchasing cargoes. In some cases they were buying for strike replacement reasons and in other cases simply to take advantage of competitive offshore prices.*

*Most of the main exporters took advantage of these events. By way of example, the total shipments from South Africa moved up to some 53 Mt compared to the 50.6 Mt for 1992. However, Australia and Indonesia have been the big gainers, up by more than 5 Mt and 3 Mt respectively. Also Colombia and Venezuela have benefited since some United States' buyers have moved towards this market.*

*Australia continues to concentrate on the East-Asia market, where the prices for high volatile coal and coal with a high heat content are 3 to 5 dollars per tonne higher than in the European markets.*

*Poland and even Russia, according to the latest information available, could have increased their exports by some 1 Mt and around 3 Mt respectively; the latter despite the certain disorder that is currently affecting its coal industry.*

## EVOLUTION OF THE WORLD TRADE FOR COAL COMMUNITY PRODUCTION & IMPORTS



• Including new german Länder from 1991

68. In the demand side, while Europe has seen imports fall, the Americas have seen an unexpectedly strong growth, largely due to the US utilities seeking offshore supplies, which has been accelerated by the United Mine Workers strike. US coal imports could be of the order of some 6 Mt, which would represent a growth of some 2 Mt with respect to the previous year's figure. Asia has by far seen the strongest growth, largely as the issue of power stations burning coal is less sensitive than in Europe in limiting the overall power demand growth. Asia's growth in demand has therefore remained strong.

### Community trade with third countries (Tables 17 and 18)

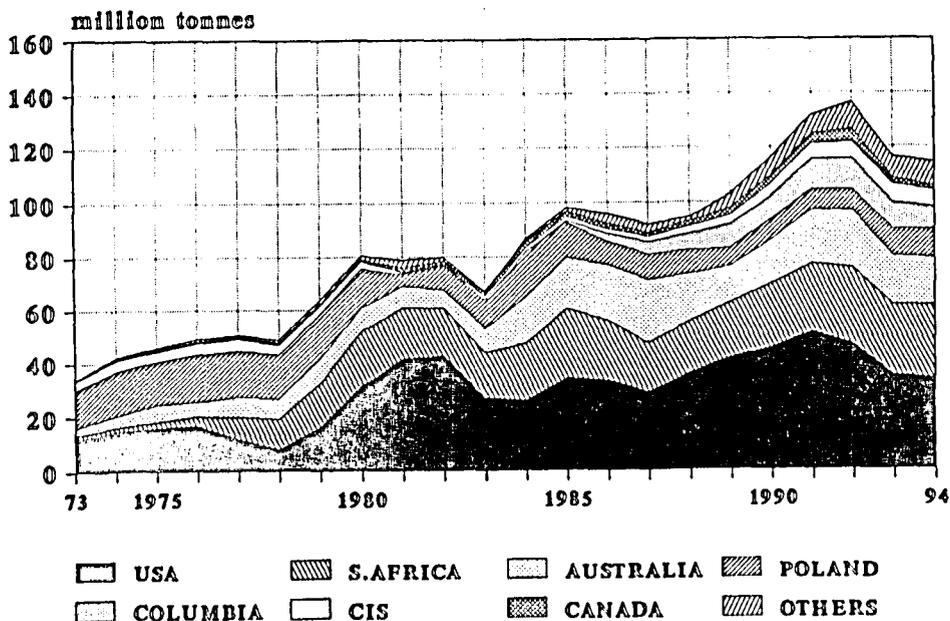
69. In 1993, imports of hard coal from non-Community countries are expected to have dropped by 20.2 Mt (-14.8%), compared to the previous year, to 116.2 Mt. Coking coals have roughly represented some 26.6% of total imports; the rest being of thermal coal qualities.

The countries with the major variations with respect to the previous year have been: France with an decrease of 7.4 Mt, followed by the United Kingdom with 3.8 Mt, Spain with 2.5 Mt and Germany and Italy with some 2.4 Mt and 2.3 Mt respectively,

just to mention the most significant. Only four countries escaped this downwards trend but, altogether, they only accounted for an increase of 0.6 Mt

70. Steam coal imports have declined by some 15%. The slowdown in demand has been the main reason for this decrease. In France, the cutbacks in imports reflect the higher than expected nuclear generation and a weaker demand for electricity. In the United Kingdom, generators have curtail imports following the deal signed with British Coal and they have also concentrated on reducing the huge stockpiles (some 31 Mt). However, the lower demand for electricity, the better performance of the nuclear plants and the increasing use of natural gas have, to a large extent, counteracted this objective. In Spain, total electricity demand has been steady, but hydropower has performed substantially better than in the previous year and consequently the demand from coal fired plants has been lower. This has had a direct impact on the level of imports.

### HARD COAL IMPORTED FROM THIRD COUNTRIES



\* Including new German Länder from 1991

71. With respect to coking coals, the decline in 1993 with respect to 1992 is of the order of some 15.1% and is the result of the slow-down in the steel industry and the technological changes that have taken place.

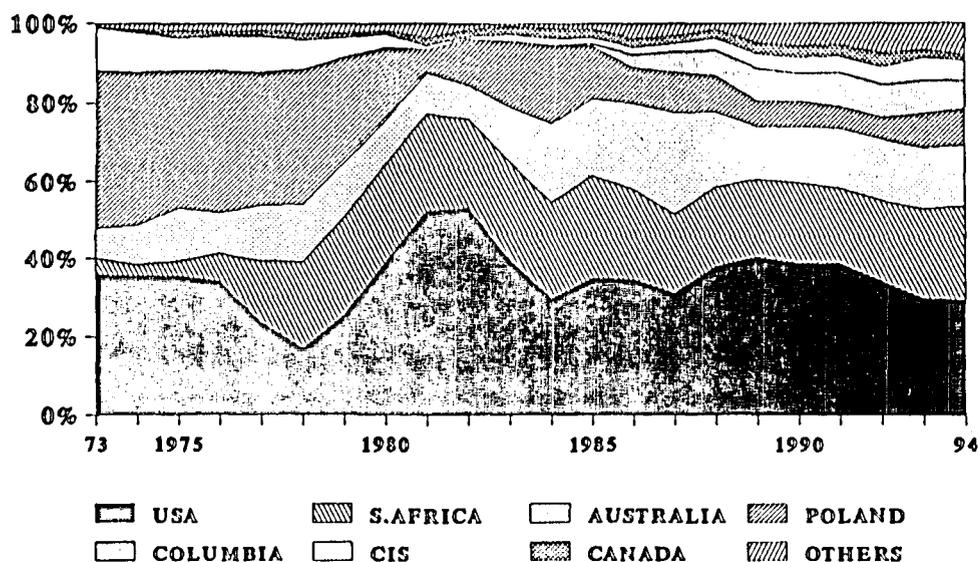
72. For 1994, Community imports could fall by 1.8 Mt to 114.4 Mt. Most countries anticipate a certain stability in import volumes with the exception of the United Kingdom and France (down by 1.9 Mt and 1 Mt respectively) and the Netherlands (1.2 Mt up). Other variations are not higher than 1 Mt.

*The weakness of the expected economic growth and the resulting weak increase in energy demand, together with the huge stockpiles in the coal producer countries and the increasing penetration of natural gas, are probably the main reasons for the downward trend in imports expected for 1994.*

73. On the supply side, the picture is one of massive decreases. This is especially marked for the United States with a drop of 12.1 Mt (or -25.9%). The United States however continues to be the Community's main supplier with 30% of the market (more than 4 percentage points down with respect to 1992), followed by South Africa with 23%, Australia 16%, and Colombia and Poland some way behind. All these countries combined supplied 85.5% of the Community's imports in 1993. Only Poland and CIS could have made net gains.

74. For 1994, all the main supplier countries are likely to lose some of their market, with the exception of South Africa, Indonesia possibly Poland and other minor suppliers. However, it is clear that this will not affect the dominant position of the major suppliers.

### HARD COAL IMPORTED FROM THIRD COUNTRIES MARKET SHARES



\* Including new German Länder from 1991

Intra-Community trade (Tables 19A and 19B, 20A and 20B)

75. As usual, there remain discrepancies between the figures that each country claims to have exported to other Member States and what the latter claim to have actually imported. Therefore, for the purposes of historical comparison, the figures for imports, which are usually lower, will be taken as the basis for this report.

However, since the 1st January 1993 and the implementation of the Single Market, with the removal of custom checks, many member States have had difficulties in determining the volume of coal in intra-Community trade.

The hard coal trade may have decreased to some 2.9 Mt in 1993, from 4.4 Mt in 1992. The forecast for 1994 is for 3.1 Mt.

With regard to the hard coal produced within the Community, it is free to move between Member States. However, national arrangements, consumption and pricing systems do not favour such movement. In addition, the prices producers are paid for their exports are generally comparable to those of deliveries from non-Community countries and, taking account the Community's production costs, are therefore not profitable. Therefore any intra-community trade is only possible if subsidies are received which allow the price of this coal to be aligned with the coal coming from third countries. It should also be borne in mind that the figures for intra-Community exchanges also includes coal coming from third countries which has been put in free practice within the Community.

76. The trade in coke coal is also in decline, at merely 1.6 Mt in 1993 compared with 2.4 Mt in 1992. In 1994 the trade is expected to decline further to 1.5 Mt.

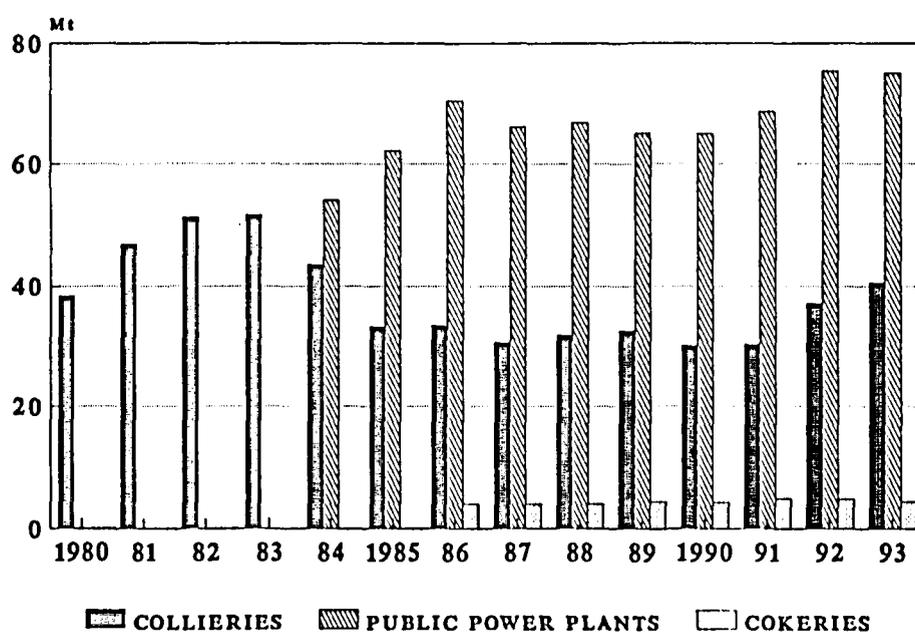
77. Since 1st January 1991 there have been no intra-Community restrictions on the imports of hard coal originating in third countries which have been put in free practice within the Community,

## IX. STOCKS (Table 21)

78. Stocks of hard coal at the collieries may have increased by some 3.4 Mt during 1993, compared with 1992, to a total of some 40.6 Mt by the end of the year. The most significant increase has been in the United Kingdom with some 2.3 Mt, to a total of 16 Mt.

79. With respect to stocks at coking plants, these may have remained steady or slightly decreased. Total stocks are estimated at 75.1 Mt. In absolute terms, the biggest stocks are those in the United Kingdom (31.4 Mt) and in Germany (14.2 Mt) but, in relative terms with respect to annual consumption at the utilities, those in France are the largest since they represent one and three-quarter years' worth at 1993 level of consumption and those of Denmark, which cover almost 10 months of consumption.

### HARD COAL STOCKS AT THE END OF YEAR



80. The combined (collieries and utilities) coal stocks represent:

- some 67% of the total hard coal deliveries to power plants in 1993; or 8.1 months of Community hard coal consumption by the utilities during 1993;
- around 42% of the total inland deliveries in the Community during 1993, or some 5.0 months of total Community hard coal consumption;

- some 72% of the Community hard coal production during 1993, or 8.7 months of Community hard coal production, and
- almost the totality of the hard coal imports to the Community from third countries during 1993.

*These stocks are essentially concentrated in two countries: the United Kingdom with some 41% of the total and Germany with some 30%. Spain, Denmark and France account for some 9%, 7% and 8% respectively.*

*81. For 1994, for the whole Community, hard coal stocks at collieries could still increase, particularly in the United Kingdom, whilst stocks at the utilities could slightly decrease as imports are adjusted to meet the actual requirement.*

## X. CONCLUSIONS.

82. Total energy demand may have fallen by more than 1% in 1993. This is due to the negative economic growth and, therefore, to the general of general industrial activity which has had an important impact on energy demand. The fall in terms of inland consumption has mainly affected solid fuels and particularly, hard coal.

Forecasts for 1994 point to a very modest increase in energy demand of only 1-1.5%, assuming normal weather conditions, with respect to 1993, as result of the moderated increase in the economy growth, mainly from mid-1994 onwards.

83. Hard coal deliveries in the Community fell significantly in 1993 to a level of 275.2 Mt, compared to 314.4 Mt in 1992. There was a general loss of hard coal penetration in all the traditional markets, with the only exception being in deliveries of thermal coal to the steel-making industry.

This marked drop is the result of a fall in total energy demand. This has affected, to an extent, the electricity generating sector but, more particularly, the demand for hard coal from the utilities which had been the locomotive for hard coal demand during recent years, especially since demand from the remaining consuming sectors has been in continuous decline.

84. Deliveries of hard coal to public power stations have declined (by some 29.1 Mt), due to a lower demand for electricity, but also due to the higher production from nuclear plants and gas-fired stations. The share of hard coal deliveries for the electricity sector has moved down from 67.2% of the total deliveries in 1992 to slightly less than 66% in 1993.

Deliveries to the other main sectors have declined as in previous years. Cokeries are down by 6.6 Mt, whilst domestic heating is down by 0.9 Mt. Even "other industries" have declined by 1.9 Mt due to the slow-down in industrial activity and the low prices for alternative fuels, which has broken the almost virtual stability shown in this sector in recent years.

85. For 1994, the volume of internal hard coal deliveries is expected to fall again by 15.6 Mt to reach 259.6 Mt. Thus the expected trend should be similar to that observed during 1993. Only thermal coal deliveries to the steel industry and to industry in general escape this trend. On the other hand, the most significant falls are forecast for deliveries to power generation (-13.1 Mt) followed by deliveries to cokeries (-2.6 Mt). By

country, a comparison with 1993 reveals no major differences in the forecasts, with the exception of the anticipated decrease in the United Kingdom.

86. As a result of the lower demand for coal and also the huge existing stocks, imports of hard coal in 1993 from non-Community countries are expected to have dropped by 20.2 Mt to reach 116.2 Mt. For 1994, Community coal imports could even fall again by 1.8 Mt to 114.4 Mt.

87. The demand for solid fuels for domestic use continues to decline steadily as in previous years and is showing no signs of stability in the near future. Environmental regulations will tend to discourage the use of solid fuels in favour of other fuels considered to be more environmentally friendly.

88. The production and demand for lignite continues to decrease gradually, due mainly to the restructuring programmes of the lignite industry carried out in the new German Länder.

89. Hard coal production continues to be affected, to varying degrees, by the policies to restructure, rationalise, modernise and improve competitiveness. Production decreased by 24.3 Mt to 160.3 Mt in 1993 and, for 1994, a similar trend is expected with a further drop of 17.9 Mt to a total output of 142.3 Mt.

90. CIF prices for both imported coking coal and imported steam coal during 1993, expressed in terms of US dollars and Community currencies, were lower than the prices observed during 1992. However the appreciation of the US dollar with respect to the Community currencies (some 10%) offset this decline in prices.

Freight rates have also been slightly lower in 1993 than in the previous year. By way of example, Atlantic rates were 6.4 US dollars/t (down 0.2 US dollars compared to 1992).

Once more the international coal market has been characterised by a surplus in supply over demand. Exports from our main supplier (the United States) were affected by the strike in its coal industry. However, even in this situation, prices have not displayed any substantial variation. Low cost exporters are making available higher tonnages on the international market whilst, in the short term, no big rises in demand are expected. This situation of oversupply is likely to continue for several years and prices should not see any significant surge upwards.

91. Current forecasts indicate that the trends observed over recent years, namely a steady decline in indigenous production with imports covering an increasing proportion of the Community coal market, will display little change. This is currently combined with the economic slump affecting not only the Community but also the rest of the world, which will obviously affect energy demand.

The coking coal and coke market is in continuous decline and will continue to decline over the coming year. But also the steam coal market could now decline due to the planned large-scale switch to gas-fired electricity generation, especially in the United Kingdom. Deliveries of coal to the electricity generating industry over recent years have increased at a faster rate than consumption, with the result that stocks at power plants have reached 75.1 Mt. Finally, the size of most of the other markets available for hard coal within the Community are much smaller and are also in decline, with no possibility of stabilisation apparent over the next few years. The only exception to this being thermal coal deliveries to the steel-making industry, and perhaps, to the industry in general when the upswing of the economy occurs.

-----

*ANNEXES*

TABLE 1

Gross internal energy consumption  
European Union

03-Mar-94

	1992 Provisional		1993 Provisional		1994 Forecasts	
	M Toe	%	M Toe	%	M Toe	%
Solid fuels	256.6	21.5	231.2	19.7	221.0	
Oil	526.8	44.1	517.3	44.0	n.a.	
Natural Gas	229.8	19.2	238.6	20.3	n.a.	
Nuclear energy	162.3	13.6	168.0	14.3	n.a.	
Other	20.1	1.7	20.2	1.7	n.a.	
<b>Total</b>	<b>1195.6</b>	<b>100.0</b>	<b>1175.3</b>	<b>100.0</b>	<b>n.a.</b>	

Source : Based on Eurostat

t7

TABLE 2

## Share of solid fuels in gross internal energy consumption

03-Mar-94

	Year	Hard coal		Lignite and peat		Total Solid Fuels	
		M Toe	%	M Toe	%	M Toe	%
E U R 1 0	1973	194.5	20.9	27.5	3.0	222.0	23.8
	1974	187.7	20.6	29.3	3.2	217.0	23.8
	1975	166.9	19.4	27.2	3.2	194.1	22.6
	1976	176.6	19.3	32.2	3.5	208.8	22.8
	1977	173.5	19.0	29.9	3.3	203.4	22.3
	1978	175.7	18.7	29.8	3.2	205.5	21.8
	1979	191.3	19.4	31.9	3.2	223.2	22.6
E U R 1 2	1980	202.6	19.6	35.7	3.5	238.3	23.1
	1981	201.1	20.1	37.5	3.8	238.6	23.9
	1982	197.3	20.2	37.2	3.8	234.5	24.0
	1983	192.4	20.0	38.0	3.9	230.4	23.9
	1984	180.6	18.2	39.1	3.9	219.7	22.2
	1985	200.7	19.5	38.3	3.7	239.0	23.2
	1986	195.8	18.8	35.8	3.4	231.5	22.2
	1987	198.1	18.6	33.2	3.1	231.3	21.8
	1988	193.0	17.9	33.8	3.1	226.8	21.0
	1989	195.6	17.8	35.4	3.2	231.0	21.0
	1990	199.4	17.9	34.9	3.1	234.3	21.0
EUR12*	1991	203.3	16.9	70.9	5.9	274.2	22.8
	1992	193.0	16.1	63.7	5.3	256.7	21.5
	1993	171.4	14.6	59.8	5.1	231.2	19.7
	1994	161.6	n.a.	59.4	n.a.	221.0	n.a.

\* Including the new German Länder

TABLE 3

## COMMUNITY HARD COAL DELIVERIES BY SECTOR AND BY COUNTRY

03-Mar-94

(In millions of metric tons)

	1992 Actual	1993 Estimates	1994 Forecasts	1993 / 1992 % Difference	1994 / 1993 % Difference
<b>A. Sector</b>					
- Thermal power stations (1)	211.4	181.6	168.5	-14.1	-7.2
- Coke ovens	60.0	53.4	50.8	-11.0	-4.9
- Iron and steel industry	7.4	7.5	8.2	1.2	9.2
- Other industries	20.8	18.9	19.0	-8.9	0.4
- Domestic sector & coal workers	10.2	9.3	8.8	-8.6	-5.5
- Patent fuel plants	2.5	2.2	2.1	-12.2	-4.6
- Own consumption at mines	0.2	0.1	0.1	-43.3	0.0
- Gasworks	0.0	0.0	0.0	0.0	0.0
- Others	1.9	2.2	2.1	11.1	-4.7
<b>Total</b>	<b>314.4</b>	<b>275.2</b>	<b>259.6</b>	<b>-12.5</b>	<b>-5.7</b>
<b>B. Country</b>					
Belgium	14.2	13.3	12.8	-6.5	-3.5
Denmark	12.4	10.8	11.2	-13.1	3.2
Germany	82.6	75.9	73.9	-8.2	-2.6
Spain	32.5	31.4	31.8	-3.2	1.0
France	31.2	22.2	22.8	-29.0	2.9
Greece	1.9	2.2	2.3	15.5	2.3
Ireland	3.0	2.8	2.6	-4.5	-6.7
Italy	17.3	16.2 *	16.2 *	-6.5	0.0
Luxembourg	0.3	0.3	0.2	-3.6	-13.8
Netherlands	12.6	13.1	14.3	3.5	9.2
Portugal	4.7	5.0	4.6	6.0	-8.3
United Kingdom	101.7	82.2	67.0	-19.2	-18.5
<b>EUR-12</b>	<b>314.4</b>	<b>275.2</b>	<b>259.6</b>	<b>-12.5</b>	<b>-5.7</b>

(1) Including pithead power stations and "other" power stations

\* Commission estimates

TABLE 4

## COKE DELIVERIES BY SECTOR AND BY COUNTRY

03-Mar-94

(In thousands of metric tons)

	1992	1993	1994	1993 / 1992	1994 / 1993
	Actual	Estimates	Forecasts	% Difference	% Difference
<b>A. Sector</b>					
- Iron and steel industry	39409	35918	34842	-8.9	-3.0
- Other industries	2522	2372	2266	-5.9	-4.5
- Domestic sector	810	731	696	-9.8	-4.8
- Other	1456	1394	1339	-4.3	-3.9
<b>Total</b>	<b>44197</b>	<b>40415</b>	<b>39143</b>	<b>-8.6</b>	<b>-3.1</b>

<b>B. Country</b>					
Belgium	4287	3880	3850	-9.5	-0.8
Denmark	44	40	40	-9.1	0.0
Germany	14088	12505	11890	-11.2	-4.9
Spain	3328	2987	2940	-10.2	-1.6
France	6848	6320	5850	-7.7	-7.4
Greece	19	20	20	5.3	0.0
Ireland	20	20	18	0.0	-10.0
Italy	5184	4469 *	4469 *	-13.8	0.0
Luxembourg	1181	1208	1100	2.3	-8.9
Netherlands	2110	2000	2000	-5.2	0.0
Portugal	279	266	266	-4.7	0.0
United Kingdom	6809	6700	6700	-1.6	0.0
<b>EUR-12</b>	<b>44197</b>	<b>40415</b>	<b>39143</b>	<b>-8.6</b>	<b>-3.1</b>

\* Commission estimates

TABLE 5

## DELIVERIES OF HARD COAL TO COKING PLANTS BY MEMBER STATES (1)

03-Mar-94

(In thousands of metric tons)

1992 : Actual 1993 : Estimates 1994 : Forecasts	National hard coal	Hard coal from other ECSC countries	Total ECSC hard coal	Hard coal from third countries	Total supplies
<b>Belgium</b> 1992		316	316	5449	5765
1993					5300
1994					5200
<b>Germany</b> 1992	18133	14	18147	1137	19284
1993					15550
1994					13900
<b>Spain</b> 1992	28	91	119	2646	2765
1993					4642
1994					4350
<b>France</b> 1992	1355	30	1385	8412	9797
1993					8100
1994					7600
<b>Italy</b> 1992		159	159	6941	7100
1993					6900 *
1994					6900 *
<b>Netherlands</b> 1992		70	70	4130	4200
1993					4100
1994					4000
<b>Portugal</b> 1992		33	33	318	351
1993					335
1994					380
<b>United Kingdom</b> 1992	1794		1794	7240	9034
1993					8500
1994					8500
<b>EUR-12</b> 1992	21310	713	22023	36273	58296
1993					53427
1994					50830

(1) For 1993 and 1994 the breakdown by origin is not available

\* Commission estimates

TABLE 6A

## DELIVERIES OF HARD COAL TO POWER PLANTS BY MEMBER STATES

03-Mar-94

(In thousands of metric tons)

1992 : Actual 1993 : Estimates 1994 : Forecasts	Public power stations (1) (2)					Private generating plants		Total	
	National hard coal	Hard coal from other ECSC countries	Total ECSC hard coal	Hard coal from third countries	Total public power stations	Collieries	Other industry		
<b>Belgium</b>	1992	659		659	5240	5899	81		5980
	1993					5885			5885
	1994					5420			5420
<b>Denmark</b>	1992		132	132	10889	11021			11021
	1993					10000			10000
	1994					10450			10450
<b>Germany</b>	1992	38084	176	38260	9765	48025	1669	4703	54397
	1993					46870	1600	4170	52640
	1994					46700	1550	4020	52270
<b>Spain</b>	1992	17917		17917	7378	25295			25295
	1993					24532			24532
	1994					24460			24460
<b>France</b>	1992	1978		1978	9309	11287	2385	137	13809
	1993					4000	2410		6410
	1994					5000	2700		7700
<b>Greece</b>	1992				477	477			477
	1993					600			600
	1994					650			650
<b>Ireland</b>	1992				2200	2200			2200
	1993					2180			2180
	1994					2000			2000
<b>Italy</b>	1992				7100	7100			7100
	1993					6300			6300
	1994					6300			6300
<b>Luxembourg</b>	1992								
	1993								
	1994								
<b>Netherlands</b>	1992				7200	7200			7200
	1993					7700			7700
	1994					9400			9400
<b>Portugal</b>	1992	222		222	3303	3525			3525
	1993					3865			3865
	1994					3312			3312
<b>United Kingdom</b>	1992	71201		71201	7840	79041	40	1294	80375
	1993					60000		1500	61500
	1994					45000		1500	46500
<b>EUR-12</b>	1992	130061	308	130369	70701	201070	4175	6134	211379
	1993					171932	4010	5670	181612
	1994					158692	4250	5520	168462

(1) For 1993 and 1994 the breakdown by origin is not available

\* Commission estimates

TABLE 6B

**DELIVERIES OF SOLID FUELS TO PUBLIC AND PITHEAD POWER STATIONS  
(EXCLUDING OTHER INDUSTRIES)**

03-Mar-94

(In millions of metric tons)

	1992 Actual	1993 Estimate	1994 Forecast	1993 / 1992 % Difference	1994 / 1993 % Difference
<b>Belgium</b>					
- Hard coal	6.0	5.9	5.4	-1.6	-7.9
<b>Denmark</b>					
- Hard coal	11.2	10.0	10.5	-10.6	4.5
<b>Germany</b>					
- Hard coal	49.7	48.5	48.3	-2.5	-0.5
- Black lignite	2.0	2.2 *	2.2 *	10.0	
- Brown coal	182.3	157.4 *	157.4 *	-13.7	0.0
<b>Spain</b>					
- Hard coal	25.3	24.5	24.5	-3.0	-0.3
- Brown coal	14.7	14.8	14.8	0.6	-0.1
<b>France</b>					
- Hard coal	13.7	6.4	7.7	-53.1	20.1
- Black lignite	1.0	1.2 *	1.3 *	24.0	0.8
- Brown coal	0.2	0.3 *	0.3 *	22.4	
<b>Greece</b>					
- Hard coal	0.5	0.6	0.7	25.8	8.3
- Brown coal	53.8	55.1	57.0	2.4	3.4
<b>Ireland</b>					
- Hard coal	2.2	2.2	2.0	-0.9	-8.3
- Peat	3.3	3.2	3.2	-2.7	
<b>Italy</b>					
- Hard coal	7.1	6.3 *	6.3 *	-11.3	
- Brown coal	1.5	1.1 *	1.1 *	-23.4	
<b>Netherlands</b>					
- Hard coal	7.2	7.7	9.4	6.9	22.1
<b>Portugal</b>					
- Hard coal	3.5	3.9	3.3	9.6	-14.3
<b>United Kingdom</b>					
- Hard coal	79.1	60.0	45.0	-24.1	-25.0
<b>EUR-12</b>					
- Hard coal	205.4	175.9	162.9	-14.4	-7.4
- Black lignite	3.0	3.4	3.5	14.7	0.3
- Brown coal +	255.9	232.0	233.9	-9.3	0.8

\* Commission estimates; + Including peat

TABLE 7

**HARD COAL AND COKE DELIVERIES TO OTHER INDUSTRIES  
(EXCLUDING THE IRON AND STEEL INDUSTRY AND POWER STATIONS)**

03-Mar-94

(In millions of metric tons)

	1992 Actual	1993 Estimates	1994 Forecast	1993 / 1992 % Difference	1994 / 1993 % Difference
<b>A. HARD COAL</b>					
Belgium	842	805	800	-4.4	-0.6
Denmark	1015	600	600	-40.9	
Germany	4263	3820	3600	-10.4	-5.8
Spain	2400	1868	2550	-22.2	36.5
France	3846	3800	3700	-1.2	-2.6
Greece	1340	1500	1500	11.9	
Ireland	360	255	250	-29.2	-2.0
Italy	1290	900 *	900 *	-30.2	
Luxembourg	140	102	130	-27.1	27.5
Netherlands	450	490 *	90 *	8.9	-81.6
Portugal	825	783	876	-5.1	11.9
United Kingdom	4000	4000	4000		
<b>EUR-12</b>	<b>20771</b>	<b>18923</b>	<b>18996</b>	<b>-8.9</b>	<b>0.4</b>

<b>B. COKE</b>					
Belgium	99	110	100	11.1	-9.1
Denmark	36	40	40	11.1	
Germany	946	845	800	-10.7	-5.3
Spain	200	200 *	200 *		
France	797	750	700	-5.9	-6.7
Greece	19	20	20	5.3	
Ireland	7	7	6		-14.3
Italy					
Luxembourg					
Netherlands					
Portugal	30				
United Kingdom	388	400	400	3.1	
<b>EUR-12</b>	<b>2522</b>	<b>2372</b>	<b>2266</b>	<b>-5.9</b>	<b>-4.5</b>

\* Commission estimates

55

TABLE 8

## DELIVERIES OF SOLID FUELS TO THE DOMESTIC SECTOR (WORKERS INCLUDED)

03-Mar-94

(In thousands of metric tons)

1992 : Actual 1993 : Estimates 1994 : Forecasts	Belgique	Danmark	Deutsch- land	Espana	France	Hellas	Ireland	Italia	Luxem- bourg	Neder- land	Portugal	United Kingdom	EUR-12
<b>A. HARD COAL, PATENT FUELS, COKE</b>													
Hard coal													
1992	680	385	1477	340	1421		390		1	10		5468	10172
1993	600	200	1060	315	1230		383		1	10		5500	9299
1994	600	100	950	315	1130		380		1	10		5300	8786
Patent fuels													
1992	31		404		677				1			1088	2201
1993	30		355		550				1			1100	2036
1994	30		310		480				1			1100	1921
Coke													
1992	17	4	726		135				1			281	1164
1993	10		715		130				1			200	1056
1994	10		660		120				1			200	991
Total													
1992	728	389	2607	340	2233		390		3	10		6837	13537
1993	640	200	2130	315	1910		383		3	10		6800	12391
1994	640	100	1920	315	1730		380		3	10		6600	11698
% 1993 / 1992													
	-12.1	-48.6	-18.3	-7.4	-14.5		-1.8					-0.5	-8.5
% 1994 / 1993													
		-50.0	-9.9		-9.4		-0.8					-2.9	-5.6
<b>B. LIGNITE BRIQUETTES AND PEAT BRIQUETTES</b>													
1992	19	2	9876				386		10				10293
1993	20	5	9040				390		11				9466
1994	20	1	8700				390		11				9122

\* Commission estimates

TABLE 9

## DELIVERIES OF LIGNITE AND PEAT BY SECTOR AND MEMBER STATE

03-Mar-94

(In millions of metric tons)

1992 : Actual 1993 : Estimates 1994 : Forecasts	Raw Products											
	Power stations			Briquetting plants			Others			Total		
	1992	1993	1994	1992	1993	1994	1992	1993	1994	1992	1993	1994
Belgium							0.2	0.2	0.2	0.2	0.2	0.2
Denmark												
Germany	184.3	159.6	159.6	42.2	45.0	44.4	18.9	20.7	17.4	245.3	225.4	221.3
Spain	14.7	14.8	14.8							14.7	14.8	14.8
France	1.2	1.5	1.6				0.2	0.2	0.2	1.5	1.8	1.8
Greece	53.8	55.1	57.0	0.2	0.2	0.2	0.5	0.7	0.8	54.5	56.0	58.0
Ireland	3.3	3.2	3.2	1.2	0.9	0.9	1.7	1.6	1.6	6.3	5.7	5.7
Italy	1.5	1.1 *	1.1 *				0.0	0.0	0.0 *	1.5	1.2 *	1.2 *
Luxembourg								0.0	0.0		0.0	0.0
Netherlands												
Portugal												
United Kingdom												
EUR-12	258.9	235.4	237.3	43.6	46.2	45.5	21.6	23.5	20.2	324.1	305.1	303.0

\* Commission estimates

TABLE 10

## HARD COAL PRODUCTION BY AREA

03-Mar-94

(In thousands of metric tons)

	1992	1993	1994
Campine	218		
<b>BELGIUM</b>	<b>218</b>		
Ruhr	57122	51400	47960
Aachen	3480	1650	1650
Ibbenburen	2016	2060	2040
Saar+Kleinzechen	9542	9190	8790
<b>GERMANY</b>	<b>72160</b>	<b>64300</b>	<b>60440</b>
Central Asturias	3982	3833	3800
Bierzo-Villablino + Narcea	6407	6581	6350
Norte Leon + Palencia	2392	2306	2250
Sur	1953	1868	1850
Aragon-Cataluña, Baleares	3901	4292	4200
<b>SPAIN</b>	<b>18635</b>	<b>18880</b>	<b>18450</b>
Lorraine	8085		
Centre-Midi	1393		
<b>FRANCE</b>	<b>9478</b>	<b>8830</b>	<b>8200</b>
<b>IRELAND</b>	<b>1</b>	<b>1</b>	<b>1</b>
<b>ITALY</b>	<b>30</b>	<b>36 *</b>	<b>36 *</b>
<b>PORTUGAL</b>	<b>220</b>	<b>220</b>	<b>220</b>
Scotland	2114		
North-East	6205		
Yorkshire	27332		
Nottinghamshire	15909		
Midlands	12704		
BC Opencast	15260	15000	
Licensed mines + Opencast	3916	4000	
<b>UNITED KINGDOM</b>	<b>83855</b>	<b>68000</b>	<b>55000</b>
<b>EUR-12</b>	<b>184597</b>	<b>160267</b>	<b>142347</b>

\* Commission estimates

TABLE 11A

## COKE PRODUCTION

03-Mar-94

(In millions of metric tons)

	Coke production capacity	% difference compared with the previous year	Hard coal deliveries	Coke production
<b>1992 : Actual</b>				
Belgium	5.1	-3.8	5.8	4.6
Germany	15.3	-15.9	19.3	14.7
Spain	3.7	-2.6	4.4	3.2
France	6.8	-8.1	9.8	6.8
Italy	8.5		7.2	5.4
Netherlands	3.7		4.2	2.9
Portugal	0.4	100.0	0.4	0.3
United Kingdom (a)	7.8	-12.4	9.0	6.5
<b>EUR-12</b>	<b>51.3</b>	<b>-8.4</b>	<b>60.0</b>	<b>44.4</b>
<b>1993 : Provisional</b>				
Belgium	4.7	-7.8	5.3	4.1
Germany	14.6	-4.6	15.6	12.1
Spain	3.7		4.6	2.9
France	5.2	-23.5	8.1	6.3
Italy	8.3	-2.4	6.9 *	4.7 *
Netherlands	3.1	-16.2	4.1	2.9
Portugal	0.4		0.3	
United Kingdom (a)	7.0	-10.3	8.5	6.5
<b>EUR-12</b>	<b>47.0</b>	<b>-8.4</b>	<b>53.4</b>	<b>39.5</b>
<b>1994 : Forecasts</b>				
Belgium	4.6	-2.1	5.2	4.0
Germany	13.7	-6.2	13.9	10.9
Spain	3.7		4.4	2.9
France	5.1	-1.9	7.6	5.9
Italy	8.2	-1.2	6.9 *	4.7 *
Netherlands	3.1		4.0	2.9
Portugal	0.4		0.4	
United Kingdom (a)	7.0		8.5	6.5
<b>EUR-12</b>	<b>45.8</b>	<b>-2.6</b>	<b>50.8</b>	<b>37.8</b>

(a) Without LTC for the United Kingdom

\* Commission estimates

TABLE 11B

## COKING PLANT CAPACITY DISTRIBUTION

03-Mar-94 (Million tonnes)

	1992 Actual	1993 Estimates	1994 Forecasts
- Colliery plants	9.6	7.4	6.5
- Iron and steel industry	39.0	37.9	37.7
- Independent (*)	2.7	1.7	1.6
<b>EUR-12</b>	<b>51.3</b>	<b>47.0</b>	<b>45.8</b>

\* Without LTC for the United Kingdom

TABLE 12A

PERSONNEL EMPLOYED UNDERGROUND  
(yearly average)

03-Mar-94 (in thousands)

	1992 Actual	1993 Estimates	1994 Forecasts
Belgium	0.8	0.3 *	0.0 *
Germany	78.3	72.0	66.5
Spain	30.0	25.8	25.8
France	7.5	7.0 *	6.8 *
Portugal	0.5	0.5 *	0.5 *
United Kingdom	30.0	23.9 *	20.0 *
Ireland	0.3	0.0	0.0
<b>EUR-12</b>	<b>147.4</b>	<b>129.6 *</b>	<b>119.6 *</b>

\* Commission estimates

TABLE 12B

## OUTPUT PER MAN/HOUR UNDERGROUND

03-Mar-94

(Kg per man/hour)

	1992 Actual	1993 Estimates	1994 Forecasts
Belgium	268	0	0
Germany	698	710	720 *
Spain	328	398	388
France	743	711 *	740 *
Portugal	na	na	na
United Kingdom	919	1213 *	1250 *
<b>EUR-12</b>	<b>703</b>	<b>758 *</b>	<b>799 *</b>

\* Commission estimates

TABLE 13

INVESTMENTS IN THE COAL INDUSTRY  
(COAL EXTRACTION AND PREPARATION)

03-Mar-94

(million ECU)

	1992 Actual	1993 Estimates	1994 Forecasts
Belgium	0.0	0.0	0.0
Germany	180.2	337.4	229.3
Spain	226.0	169.4	102.6
France	31.3	29.7	28.5
Italy	1.9	4.7	4.2
Portugal	0.5	0.0	0.0
United Kingdom	212.9	189.1	116.0
<b>EUR-12</b>	<b>652.8</b>	<b>730.3</b>	<b>480.6</b>

61

TABLE 14

## Exchange rates : US \$ - European currencies

03-Mar-94

1 US Dollar =		BFR	DKR	DM	DRA	PTA	FF	IRL	LIT	HFL	ESC	UKL	ECU
1992	1st quarter	33.32	6.280	1.619	186.98	102.13	5.509	0.6072	1217.7	1.822	139.62	0.5649	0.792
	2nd quarter	33.22	6.236	1.614	191.82	101.38	5.441	0.6048	1217.2	1.818	135.52	0.5536	0.786
	3rd quarter	30.15	5.647	1.463	181.44	95.18	4.959	0.5515	1133.6	1.649	126.28	0.5258	0.722
	4th quarter	31.91	5.985	1.551	202.58	110.78	5.264	0.5883	1361.6	1.744	138.56	0.6347	0.789
	Year :	1992	32.15	6.037	1.562	190.71	102.37	5.293	0.5879	1232.5	1.758	134.99	0.5697
1993	1st quarter	33.69	6.289	1.635	219.91	116.62	5.546	0.6549	1544.6	1.839	149.12	0.6775	0.840
	2nd quarter	32.94	6.209	1.618	220.09	121.19	5.457	0.6635	1503.7	1.816	152.31	0.6513	0.829
	3rd quarter	35.39	6.732	1.677	234.78	134.66	5.815	0.7080	1585.3	1.885	168.94	0.6647	0.869
	4th quarter	35.86	6.700	1.684	242.20	136.64	5.836	0.7048	1652.7	1.889	172.67	0.6704	0.877
	Year :	1993	34.47	6.482	1.653	229.24	127.28	5.663	0.6828	1571.6	1.857	160.76	0.6660
% Difference													
4th Qu. 1993 /4th Qu. 1992		12.4 %	11.9 %	8.6 %	19.6 %	23.3 %	10.9 %	19.8 %	21.4 %	8.3 %	24.6 %	5.6 %	11.2 %
Year 1993 /year 1992		7.2 %	7.4 %	5.9 %	20.2 %	24.3 %	7.0 %	16.1 %	27.5 %	5.6 %	19.1 %	16.9 %	10.8 %

61

TABLE 15 A

## Quarterly average CIF prices for coal imported from third countries

03-Mar-94

(US \$)

	1992				1993			
	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
<b>A. STEAM COAL (1)</b>								
NCV (Kj/Kg)	26390	26513	26402	26240	26298	26100	26055	n.a.
- per tonne	47.89	46.69	47.18	44.87	43.28	41.37	42.66	n.a.
- per tce	53.17	51.60	52.36	50.11	48.22	46.44	47.98	n.a.
<b>B. COKING COAL (2)</b>								
NCV (Kj/Kg)	29386	29386	29386	29386	29386	29386	29386	29386
- per standard tonne (3) (4)	58.90	58.00	57.50	57.30	57.50	56.80	55.30	55.00
- per tce	58.73	57.83	57.34	57.14	57.34	56.64	55.14	54.84
<b>Ratio B/A (%) per tce</b>	110.5 %	112.1 %	109.5 %	114.0 %	118.9 %	122.0 %	114.9 %	

(1) As per the quarterly reports from the Member States (Decision 86/161/ECSC of the 26th February 1985 modifying Decision 77/707/ECSC of the 7th November 1977).

(2) Guide price (Decision 73/287/ECSC of the 25th July 1973 and Decision 2064/86/ECSC of the 30th June 1986). Reference date : the beginning of the quarter.

(3) Specification of the standard quality : ashes 7.5%, water 8%, volatile matter 26%, sulphur 0.8%.

(4) Trends of the mean value : at the first of January of each year :

1970	17.50	1976	62.75	1982	82.45	1988	51.30
1971	23.90	1977	61.65	1983	76.25	1989	54.85
1972	23.65	1978	62.10	1984	66.20	1990	57.80
1973	26.05	1979	63.95	1985	62.75	1991	60.40
1974	31.90	1980	68.50	1986	61.90	1992	58.90
1975	59.55	1981	75.70	1987	53.40	1993	57.50

TABLE 15B

## COKING COAL IMPORTS

Guide price in national currencies per tce, new reference grade

03-Mar-94

Reference date	USD	BFR	DKR	DM	DRA	PTA	FF	IRL	LIT	HFL	ESC	UKL	ECU
<b>1992</b>													
1st quarter	58.90	1963	369.9	95.36	11013	6015	324.5	35.76	71732	107.3	8224	33.27	46.65
2nd quarter	58.00	1927	361.7	93.61	11126	5880	315.6	35.08	70598	105.4	7860	32.11	45.59
3rd quarter	57.50	1734	324.7	84.12	10433	5473	285.1	31.71	65182	94.8	7261	30.23	41.52
4th quarter	57.30	1828	342.9	88.87	11608	6348	301.6	33.71	78020	99.9	7939	36.37	45.21
<b>1993</b>													
1st quarter	57.50	1937	361.6	94.01	12645	6706	318.9	37.66	88815	105.7	8574	38.96	48.30
2nd quarter	56.80	1871	352.7	91.90	12501	6884	310.0	37.69	85410	103.1	8651	36.99	47.07
3rd quarter	55.30	1957	372.3	92.74	12983	7447	321.6	39.15	87667	104.2	9342	36.76	48.08
4th quarter	55.00	1972	368.5	92.60	13321	7515	321.0	38.77	90901	103.9	9497	36.87	48.25
<b>% Difference</b>													
4th Qu. 1993 / 4th Qu. 1992	-4.0 %	7.9 %	7.5 %	4.2 %	14.8 %	18.4 %	6.4 %	15.0 %	16.5 %	4.0 %	19.6 %	1.4 %	6.7 %

TABLE 15C

**STEAM COAL IMPORTS**  
Average price in national currencies per tce

03-Mar-94

Reference date	USD	BFR	DKR	DM	DRA	PTA	FF	IRL	LIT	HFL	ESC	UKL	ECU
<b>1992</b>													
1st quarter	53.17	1771.62	333.9	86.08	9942	5430	292.9	32.28	64745	96.9	7424	30.04	42.11
2nd quarter	51.60	1714.15	321.8	83.28	9898	5231	280.8	31.21	62808	93.8	6993	28.57	40.56
3rd quarter	52.36	1578.65	295.7	76.60	9500	4984	259.7	28.88	59355	86.3	6612	27.53	37.80
4th quarter	50.11	1599.01	299.9	77.72	10151	5551	263.8	29.48	68230	87.4	6943	31.80	39.54
<b>1993</b>													
1st quarter	48.22	1624.53	303.3	78.84	10604	5623	267.4	31.58	74481	88.7	7191	32.67	40.50
2nd quarter	46.44	1529.73	288.3	75.14	10221	5628	253.4	30.81	69832	84.3	7073	30.25	38.48
3rd quarter	47.98	1698.01	323.0	80.46	11265	6461	279.0	33.97	76063	90.4	8106	31.89	41.71
4th quarter	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<b>% Difference</b>													
3rd Qu 1993 /3rd Qu. 1992	-8.4 %	7.6 %	9.2 %	5.0 %	18.6 %	29.6 %	7.5 %	17.6 %	28.1 %	4.7 %	22.6 %	15.8 %	10.3 %

TABLE 16

## WORLD COAL PRODUCTION AND TRADE

03-Mar-94

(In millions of metric tons)

I. WORLD TRADE BY COUNTRY AND REGION	1991	1992	1993	1994
Community imports from third countries	132	136	118	115
Imports : Japan	110	111	112	114
Imports : NIC-Asia (1)	58	63	70	75
Imports : other countries	71	70	71	73
<b>(a) Subtotal coal sea-borne trade</b>	<b>371</b>	<b>380</b>	<b>371</b>	<b>377</b>
of which: - Coking coal	164	155	152	147
- Others	207	225	219	230
Intra-Community coal trade	9	4	3	3
Intra-Eastern European trade	14	16	15	15
USA-Canada trade	13	14	9	13
<b>(b) Subtotal regional trade</b>	<b>36</b>	<b>34</b>	<b>27</b>	<b>31</b>
<b>(c) TOTAL WORLD TRADE (=a+b)</b>	<b>407</b>	<b>414</b>	<b>398</b>	<b>408</b>
of which: - Coking coal	178	168	164	159
- Others	229	246	234	249
<i>Difference from year to year (%)</i>		1.7	-3.9	2.5
<b>II. WORLD PRODUCTION OF COAL</b>				
Western Europe	193	185	160	
(EUR)	193	185	160	
North America	865	863	860	
(USA)	825	831	829	
(Canada)	40	32	31	
CIS	485	468	418	
China	1087	1095	1105	
Poland	140	132	132	
South Africa	180	175	180	
Australia	165	179	175	
India	229	238	242	
Japan	8	8	7	
Latin America	39	40	41	
(Colombia)	24	24	24	
Rest of the world	121	120	121	
<b>(d) TOTAL WORLD PRODUCTION OF COAL</b>	<b>3512</b>	<b>3503</b>	<b>3441</b>	
<b>III. SEA-BORNE TRADE OF COAL IN % OF WORLD PRODUCTION (a/d)</b>	<b>10.6</b>	<b>10.8</b>	<b>10.8</b>	

\* Commission estimates

+ Commission forecasts

(1) Newly-Industrialised Countries in East Asia : Hong Kong, South Korea and Taiwan

65

TABLE 17

## IMPORTS OF HARD COAL FROM THIRD COUNTRIES

03-Mar-94

(In millions of metric tons)

	1991 Actual	1992 Actual	1993 Estimate	1994 Forecasts
<b>A. By country of destination</b>				
Belgium	13.3	13.1	12.4	11.8
Denmark	12.4	11.8	10.8	11.1
Germany	13.7	14.2	11.8 *	11.6 *
Greece	1.5	2.1	2.2	2.3
Spain	11.9	14.5	12.0	12.8
France	20.2	21.4	14.0	13.0
Ireland	2.7	2.7	2.3	2.5
Italy	19.6	17.2	14.9 *	14.9 *
Luxembourg	0.2	0.3	0.2	0.2
Netherlands	15.2	14.7	14.8	16.0
Portugal	3.7	4.4	4.8	4.3
United Kingdom	17.6	19.9	16.1	14.0
<b>EUR-12</b>	<b>131.9</b>	<b>136.4</b>	<b>116.2</b>	<b>114.4</b>

<b>B. By country of origin</b>				
USA	51.4	46.8	34.7	33.6
Canada	3.7	4.7	2.3	1.5
Australia	20.0	21.3	18.3	17.8
South Africa	25.5	28.3	26.6	27.7
Poland	7.4	7.8	10.1	10.5
CIS	5.5	6.2	6.8	5.9
China	3.0	2.9	1.3	1.2
Colombia	11.3	11.3	9.6	8.3
Others	4.0	7.1	6.4	7.8
<b>EUR-12</b>	<b>131.9</b>	<b>136.3</b>	<b>116.2</b>	<b>114.4</b>

\* Commission estimates

TABLE 18

## COAL IMPORTS FROM THIRD COUNTRIES

03-Mar-94

(In thousands of metric tons)

1993	U.S.A	Canada	Australia	South Africa	Poland	CIS	China	Colombia	Others	Total Imports
Belgium	4550	30	2325	3905	305	385	415	265	260	12440
Denmark	500	200	600	2800	3200	1900		1500	50	10750
Germany	1105 *	45 *	863 *	5090 *	2643 *	274 *		785 *	985 *	11790 *
Spain	4200	250	1130	4200	150	350		1000	720	12000
France	4700	60	2800	2200	1160	270	690	1100	980	13960
Greece				1000		1000			200	2200
Ireland	1140			29	436	25	2	15	648	2295
Italy	6738 *	197 *	1619 *	3106 *	199 *	1615 *			1427 *	14900 *
Luxembourg				128		107			10	245
Netherlands	5910	500	4400	1050	775		100	1020	1000	14755
Portugal	1348	207	60	2084	45	161		858		4763
UK	4534 *	800 *	4503 *	1032 *	1219 *	750 *	61 *	3049 *	152 *	16100
EUR-12	34724	2289	18299	26624	10132	6838	1268	9592	6432	116198

\* Commission estimates

(In thousands of metric tons)

1994	U.S.A	Canada	Australia	South Africa	Poland	CIS	China	Colombia	Others	Total Imports
Belgium	4285	30	2205	3685	300	380	385	250	265	11785
Denmark	200	200	400	4000	3900	1200		900	300	11100
Germany	1087 *	45 *	849 *	5003 *	2598 *	269 *		772 *	969 *	11592 *
Spain	4200	200	1150	4800	100	300		1000	1000	12750
France	4500	50	2500	2000	1000	250	700	1000	1000	13000
Greece				1050		1000			200	2250
Ireland	1132			26	426	20	2	10	900	2516
Italy	6738 *	197 *	1619 *	3106 *	199 *	1615 *			1427 *	14900 *
Luxembourg				140		60				200
Netherlands	6500		5100	1150	800		100	1000	1300	15950
Portugal	1050	112	68	1868	50	200		700	300	4348
UK	3928 *	700 *	3902 *	893 *	1116 *	642 *	50 *	2641 *	127 *	14000
EUR-12	33620	1534	17793	27722	10489	5936	1237	8273	7788	114391

\* Commission estimates

TABLE 19A

## INTRA-COMMUNITY TRADE OF COAL IN 1994

(In thousands of metric tons)

03-Mar-94  
From ---->

To	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Portugal	United Kingdom	Total deliveries	Total receipts
Belgium			364 *							350		100	814	
			505		5					5		55	570	
Denmark												150	150	
												50 *	50	
Germany	115									1200		50	1365	
	220 *				390 *					80 *		18 *	708 *	
Spain	25		36 *							100			161	
	150		30		30	5				150	15	120	500	
France	215		131 *							300		250	896	
			200									100	300	
Greece														
Ireland			1 *							50		350	401	
	8		12		9					31		268	328	
Italy	10		84 *										94	
					10 *								10 *	
Luxembourg	75		1 *										76	
	30		1										31	
Netherlands	70		82 *										152	
	200		150		50								400	
Portugal														
United Kingdom	5		100 *				20			100			225	
			200										200	
Total deliveries	515		800		420 +		20			2100		900	4755	
Total receipts	458		1068		464					116		491	3097	

1st Line : data supplied by the exporting Member State; 2nd Line : data supplied by the importing Member State

\* Commission estimates; + Breakdown by Member State not available

69

TABLE 19B

## INTRA-COMMUNITY TRADE OF COAL IN 1993

(In thousands of metric tons)

03-Mar-94														
From ---->													Total deliveries	Total receipts
To	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Portugal	United Kingdom	Total deliveries	Total receipts
Belgium			341 *							350		100	791	
			405		5					5		55	470	
Denmark												100	100	
												50 *	50	
Germany	115									1125			1240	
	180 *				390 *					80 *		60 *	710 *	
Spain	25		34 *							100			159	
	150		30		30	5				150	15	120	500	
France	200		123 *							240		200	763	
			210									100	310	
Greece														
Ireland			1 *							15		300	316	
	8		12		9					33		268	330	
Italy	10		79 *										89	
					10 *								10 *	
Luxembourg	70		1 *										71	
	22		1										23	
Netherlands	90		77 *										167	
	180		110		5								295	
Portugal														
United Kingdom	5		94 *				20			90			209	
			200										200	
Total deliveries	515		750		468 +		20			1920		700	4373	
Total receipts	390		938		419					118		533	2898	

1st Line : data supplied by the exporting Member State; 2nd Line : data supplied by the importing Member State

\* Commission estimates; + Breakdown by Member State not available

TABLE 20A

## INTRA-COMMUNITY TRADE OF COKE IN 1994

03-Mar-94

(In thousands of metric tons)

To	From ---->												Total deliveries
	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem- bourg	Nether- lands	Portugal	United Kingdom	Total receipts
Belgium			6 *							350			356
			50		55					45			150
Denmark			3 *										3
	1 *		7 *		8 *					1 *		23 *	40
Germany	120							20 *		400			540
	250 *				150 *					100 *			500 *
Spain										50			50
	15		1		20			1 *			3		40
France	140							34 *		100			274
	200												200
Greece													
								20 *					20
Ireland													
	6		4							3		2	15
Italy													
Luxembourg	375		405 *										780
	430		430							240			1100
Netherlands	15		36 *										51
	75		50		50								175
Portugal													
				8									8
United Kingdom										50			50
				20	30					50			100
Total deliveries	650		450		294 +			54 *		950			2398
Total receipts	962		541	28	293			20		439		25	2348

1st Line : data supplied by the exporting Member State; 2nd Line : data supplied by the importing Member State

\* Commission estimates; + Breakdown by Member State not available

17

TABLE 20B

INTRA-COMMUNITY TRADE OF COKE IN 1993

03-Mar-94

(In thousands of metric tons)

(In thousands of metric tons)

To	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Portugal	United Kingdom	Total deliveries	Total receipts
Belgium			8 *							350			358	
			50		55					45			150	
Denmark			3 *										3	
	1 *		7 *		8 *					1 *		23 *	40	
Germany	130							20 *		400			550	
	225 *				135 *					90 *			450 *	
Spain										40			40	
	15		1		20			1 *			3		40	
France	150							34 *		150			334	
	230												230	
Greece														
								20 *					20	
Ireland														
	6		4							3		2	15	
Italy	5												5	
Luxembourg	395		495 *										890	
	441		448							246			1135	
Netherlands	20		44 *										64	
	75		50		50								175	
Portugal														
				8									8	
United Kingdom										50			50	
				20	30					50			100	
Total deliveries	700		550		264 +			54 *		990			2558	
Total receipts	978		559	28	278			20		435		25	2363	

1st Line : data supplied by the exporting Member State; 2nd Line : data supplied by the importing Member State

\* Commission estimates; + Breakdown by Member State not available

TABLE 21

## STOCKS

03-Mar-94

(In millions of metric tons)

	Producers			Power Stations			Coking plants					
	(Hard coal)			(Hard coal)			(Coke)			(Hard coal)		
	1992 Actual	1993 Estimate	1994 Forecast									
Belgium	0.057	0.032	0.032	0.598	0.525	0.525	0.181	0.181	0.181	0.431	0.440	0.440
Denmark				8.261	7.895							
Germany	19.678	20.514	19.284	14.127	14.200	14.500	4.398	5.246	5.116	0.310	0.250	0.300
Spain	1.219	1.295	1.295	9.174	9.400	9.400	0.171	0.200 +		0.452	0.400	0.400
France	2.480	2.700	1.750	6.311	7.000	6.000	0.460	0.483 +		0.912	0.800 +	
Greece							0.003	0.003 +				
Ireland	0.020	0.020 +		0.503	0.525	0.475						
Italy				1.578	1.500 +		0.180	0.180 +		1.000	1.000 +	
Luxembourg												
Netherlands				1.750	1.750 +		0.200	0.130 +		0.454	0.500 +	
Portugal	0.001	0.001		0.844	0.831		0.053	0.022		0.060	0.037	
United Kingdom	13.714 *	16.000 *	18.000 *	32.173	31.442		0.706	0.640 +		1.289	1.100	
EUR-12	37.169	40.562	n.a.	75.319	75.068	n.a.	6.352	7.085	n.a.	4.908	4.527	n.a.

\* Excluding low grade; + figures to the end of October 1993

TABLE 22

## HARD COAL BALANCE SHEET FOR 1994

03-Mar-94

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy *	Luxem- bourg	Nether- lands	Portugal	United Kingdom	EUR-12
1. PRODUCTION (t=1)			60440	18450	8200		1	36			220	55000	142347
2. RECOVERIES	1015		800	50								800	2665
3. RECEIPTS FROM ECSC COUNTRIES	570	50	708 *	500	300		328	10	31	400		200	3097
4. IMPORTS FROM THIRD COUNTRIES	11785	11100	11592 *	12750	13000	2250	2516	14900	200	15950	4348	14000	114391
5. AVAILABILITIES (1+2+3+4)	13370	11150	73540	31750	21500	2250	2845	14946	231	16350	4568	70000	259403
6. TOTAL INLAND DELIVERIES	12825	11150	73900	31750	22800	2250	2630	16200	231	14250	4568	67000	259554
A.- POWER STATIONS AT MINES			1550		2700								4250
B.- POWER STATIONS	5420	10450	46700	24460	5000	650	2000	6300		9400	3312	45000	158692
C.- COKING PLANTS	5200		13900	4350	7600			6900		4000	380	6500	50830
D.- IRON AND STEEL INDUSTRY (of which POWER STATIONS)	800		2500		2300	100		1200	100	750 *		500 *	8250
E.- OTHER INDUSTRIES (of which POWER STATIONS)	800	600	7600	2550	3700	1500	250	900	130	90 *	876	5500	24496
F.- DOMESTIC HEATING	600	100	850	250	1100		380		1	10 *		5000	8291
G.- MISCELLANEOUS (TOTAL 1 - 6)	5		800	140	400			900				2500	4745
1. ISSUE TO WORKERS			100	65	30 *							300	495
2. PATENT FUEL PLANTS	5		510		350 *							1200	2065
3. OWN CONSUMPTION AT MINES			60	75									135
4. GASWORKS													
5. RAILWAYS			70										70
6. OTHERS			60		20 *			900				1000	1980
7. DELIVERIES TO ECSC COUNTRIES	515		800		420 *		20			2100		900	4755
8. EXPORTS TO THIRD COUNTRIES	30		50		80 *							100	260
9. TOTAL DELIVERIES (6+7+8)	13370	11150	74750	31750	23300	2250	2650	16200	231	16350	4568	68000	259814
10. MOVEMENT OF PRODUCERS' AND IMPORTERS STOCKS (5-9)			-1210		-1800		195	-1254				2000	-2069

\* Commission estimates

TABLE 23

## HARD COAL BALANCE SHEET FOR 1993

03-Mar-94

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy *	Luxem- bourg	Nether- lands	Portugal	United Kingdom	EUR-12
1. PRODUCTION (t=t)			64300	18880	8830		1	36			220	68000	160267
2. RECOVERIES	905		1200	52								1000	3157
3. RECEIPTS FROM ECSC COUNTRIES	470	50	710 *	500	310		330	10	23	295		200	2898
4. IMPORTS FROM THIRD COUNTRIES	12440	10750	11790 *	12000	13960	2200	2295	14900	245	14755	4763	16100	116198
5. AVAILABILITIES (1+2+3+4)	13815	10800	78000	31432	23100	2200	2626	14946	268	15050	4983	85300	279622
6. TOTAL INLAND DELIVERIES	13295	10800	75850	31432	22150	2200	2818	16200	268	13050	4983	82200	275246
A.- POWER STATIONS AT MINES			1600		2410								4010
B.- POWER STATIONS	5885	10000	46870	24532	4000	600	2180	6300		7700	3865	60000	171932
C.- COKING PLANTS	5300		15550	4642	8100			6900		4100	335	8500	53427
D.- IRON AND STEEL INDUSTRY (of which POWER STATIONS)	700		2000		2140	100		1200	165	750 *		500 *	7555
E.- OTHER INDUSTRIES (of which POWER STATIONS)	805	600	7970	1868	3800	1500	255	900	102	490 *	783	5500	24573
F.- DOMESTIC HEATING	600	200	960	250	1200		383		1	10 *		5200	8804
G.- MISCELLANEOUS (TOTAL 1 - 6)	5		900	140	500			900				2500	4945
1. ISSUE TO WORKERS			100	65	30 *							300	495
2. PATENT FUEL PLANTS	5		560		400 *							1200	2165
3. OWN CONSUMPTION AT MINES			60	75									135
4. GASWORKS													
5. RAILWAYS			80										80
6. OTHERS			100		70 *			900				1000	2070
7. DELIVERIES TO ECSC COUNTRIES	515		750		468 *		20			1920		700	4373
8. EXPORTS TO THIRD COUNTRIES	30		40		132 *							100	302
9. TOTAL DELIVERIES (6+7+8)	13840	10800	76640	31432	22750	2200	2838	16200	268	14970	4983	83000	275548
10. MOVEMENT OF PRODUCERS' AND IMPORTERS STOCKS (5-9)	-25		1360		350		-212	-1254		80		2300	2599

\* Commission estimates

55

TABLE 24

## COKE BALANCE SHEET FOR 1994

03-Mar-94

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy *	Luxem- bourg	Nether- lands	Portugal	United Kingdom	EUR-12
1. PRODUCTION (t=1)	3950		10900	2900	5900			4700		2900		6500	37750
2. RECEIPTS FROM ECSC COUNTRIES	150	40 *	500 *	40	200		15		1100	175	8	100	2328
3. IMPORTS FROM THIRD COUNTRIES	450		760 *			20	4		70	125		100	1529
4. TOTAL AVAILABILITIES (1+2+3)	4550	40	12160	2940	6100	20	19	4700	1170	3200	8	6700	39279
5. TOTAL INLAND DELIVERIES	3850	40	11890	2940	5850	20	18	4469	1100	2000	266	6700	39143
A.- STEEL INDUSTRY	3715		10110	2740 *	4900		12	4000	1099	2000	266	6000	34842
B.- OTHER INDUSTRIES	100	40	800	200 *	700	20	6					400	2266
C.- DOMESTIC SECTOR	5		370		120				1			200	696
D.- MISCELLANEOUS of which :	30		610		130			469				100	1339
1. ISSUE TO WORKERS	5		290										295
2. OWN CONSUMPTION			5										5
3. OTHERS	25		315		130			469				100	1039
6. DELIVERIES TO ECSC COUNTRIES	650		450		294 *			54		950			2398
7. EXPORTS TO THIRD COUNTRIES	50		150		56 *			124		250	12		642
8. TOTAL DELIVERIES (5+6+7)	4550	40	12490	2940	6200	20	18	4647	1100	3200	278	6700	39785
9. STOCK MOVEMENT AT PRODUCTION & IMPORTS (4-8)			-330		-100		1	53	70				-306

\* Commission estimates

TABLE 25

## COKE BALANCE SHEET FOR 1993

03-Mar-94

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy +	Luxem- bourg	Nether- lands	Portugal	United Kingdom	EUR-12
1. PRODUCTION (t=t)	4050		12100	2947	6300			4700		2900		6500	39497
2. RECEIPTS FROM ECSC COUNTRIES	150	40 *	450 *	40	230		15		1135	175	8	100	2343
3. IMPORTS FROM THIRD COUNTRIES	450		755 *		120	20	5		73	125		100	1648
4. TOTAL AVAILABILITIES (1+2+3)	4650	40	13305	2987	6650	20	20	4700	1208	3200	8	6700	41145
5. TOTAL INLAND DELIVERIES	3880	40	12505	2987	6320	20	20	4469	1208	2000	266	6700	40415
A.- STEEL INDUSTRY	3730		10615	2787 *	5300		13	4000	1207	2000	266	6000	35918
B.- OTHER INDUSTRIES	110	40	845	200 *	750	20	7					400	2372
C.- DOMESTIC SECTOR	5		395		130				1			200	731
D.- MISCELLANEOUS of which :	35		650		140			469				100	1394
1. ISSUE TO WORKERS	5		320										325
2. OWN CONSUMPTION			5										5
3. OTHERS	30		325		140			469				100	1064
6. DELIVERIES TO ECSC COUNTRIES	700		550		264 *			54		990			2558
7. EXPORTS TO THIRD COUNTRIES	70		100		136 *			124		210	12		652
8. TOTAL DELIVERIES (5+6+7)	4650	40	13155	2987	6720	20	20	4647	1208	3200	278	6700	41067
9. STOCK MOVEMENT AT PRODUCTION & IMPORTS (4-8)			350		-70			53					333

\* Commission estimates; + Data supplied in April 1993

TABLE 26

## LIGNITE AND PEAT BALANCE SHEET FOR 1994

03-Mar-94

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy *	Luxem- bourg	Nether- lands	Portugal	United Kingdom	EUR-12
<b>A. RAW PRODUCT</b>													
- AVAILABILITIES :	225		221300	14800	1650	58000	5853	1171	8				303007
PRODUCTION			218500	14800	1620	58000	5827	1149					299896
IMPORTS	225		2800		30		26	22	8				3111
- UTILIZATION :	225		221300	14800	1750	58000	5734	1171	8				302988
BRIQUETTING PLANTS			44350			200	933						45483
POWER STATIONS			159600	14800 *	1550	57000	3235	1149					237334
OTHERS	225		17350		200	800	1566	22	8				20171
<b>B. BRIQUETTES</b>													
- AVAILABILITIES :	20	5	14260			60	391		11				14747
PRODUCTION			13860			60	384						14304
ARRIVAL FROM ECSC COUNTRIES	20	5 *					7		11				43
IMPORTS FROM THIRD COUNTRIES			400										400
- UTILIZATION	20	2	14230			60	394		11				14717
POWER STATIONS													
INDUSTRY			4750										4750
DOMESTIC	20	1	8700				390		11				9122
SHIPMENTS TO OTHER ECSC COUNTRIES							4						4
EXPORTS TO NON-MEMBER COUNTRIES			780										780
- OTHERS		1				60							61

\* Commission estimates

TABLE 27

## LIGNITE AND PEAT BALANCE SHEET FOR 1993

03-Mar-94

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy +	Luxem- bourg	Nether- lands	Portugal	United Kingdom	EUR-12
<b>A. RAW PRODUCT</b>													
- AVAILABILITIES :	225		225350	14822	1730	56000	5855	1171	8				305161
PRODUCTION			222580	14822	1700	56000	5827	1149					302078
IMPORTS	225		2770		30		28	22	8				3083
- UTILIZATION :	225		225350	14822	1750	56000	5736	1171	8				305062
BRIQUETTING PLANTS			45035			200	933						46168
POWER STATIONS			159590	14822 *	1540	55100	3235	1149					235436
OTHERS	225		20725		210	700	1568	22	8				23458
<b>B. BRIQUETTES</b>													
- AVAILABILITIES :	20	5	14719			60	393		11				15208
PRODUCTION			14280			60	384						14724
ARRIVAL FROM ECSC COUNTRIES	20	5 *					9		11				45
IMPORTS FROM THIRD COUNTRIES			439										439
- UTILIZATION	20	5	14719			60	395		11				15210
POWER STATIONS													
INDUSTRY			4919										4919
DOMESTIC	20	5	9040				390		11				9466
SHIPMENTS TO OTHER ECSC COUNTRIES							5						5
EXPORTS TO NON-MEMBER COUNTRIES			760										760
- OTHERS						60							60

\* Commission estimates; + data supplied in April 1993