COMMISSION OF THE EUROPEAN COMMUNITIES

SEC (89) 280 final / 2
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Brussels, 10 March 1989

Ce document annule et remplace
la version diffusée en F, D et EN
le 7 mars 1989

REPORT FROM THE COMMISSION

THE MARKET FOR SOLID FUELS IN THE COMMUNITY

IN 1988 AND THE OUTLOOK FOR 1989

SEC(89) 280 final/2

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I. INTRODUCTION AND SUMMARY

1. Article 46 of the ECSC Treaty provides that the Commission shall, in order to provide guidance on the course of action to be followed by all concerned and to determine its own course of action: "conduct a continuous study of market and price trends".

   This action entails, among other things, the drawing up of periodic market reports for solid fuels as well as short term forecasts. A first concise report covering the current year and first forecasts for the year to come are submitted to the ECSC Consultative Committee in December. The main market report is usually established at the beginning of each year, and submitted to the Consultative Committee at its March session; it is released to the public in May/June. It is follwed by a "Revision of the market report" which is submitted to the ECSC Consultative Committee in September and released during the last quarter of the year.

   In addition, the study of market developments constitutes one of the instruments allowing the Commission to fulfill its task under the Council Recommendation for long term Community energy policy objectives. This task is to review periodically progress made towards fulfillment of Community objectives and to report to the Council.

2. This report analyses the state of the Community solid fuels market in 1988; it forecasts developments for 1989 and provides final reference data for 1987.

   The data for 1988 and 1989 are those available in January 1989. The forecasts for 1989 were drawn up at the end of 1988 by the Member States and were updated as far as possible at the beginning of 1989.

3. In 1988, economic growth in real terms in the Community was, at 3.7%, the highest recorded since 1970: economic growth is expected to be about 3% in 1989.

   Inspite of this remarkable economic growth, the Community's gross energy consumption hardly increased (+0.1%) as a result of the extremely mild weather conditions throughout the year. A decrease in energy demand for space heating was obviously compensating growth in the industrial and transport sectors. Assuming normal weather conditions in 1989, an increase in total energy demand of at least 3% is to be expected.

4. On the solid fuel market deliveries (which reflect demand except for stock movements) have been rather stable. Whereas hard coal deliveries had still dropped by 5.2% between 1986 and 1987, the reduction was only 1.3% in 1988, and a similar value is expected for 1989. Lignite and peat deliveries, which decreased by 1.5% in 1987, were up by 0.5% in 1988 and should increase considerably by more than 5% in 1989. Expressed in energy equivalent, solid fuel consumption is practically constant over the last years and remains close to 231 Mtoe.

5. Community production of hard coal, however, offers a less favourable picture: -11.9 Mtot in 1987, -8.9 Mtot in 1988 and -3.9 Mtot expected for 1989 (bearing in mind that production forecasts have a tendency to be over-optimistic). Hard coal production, excluding recoveries, is unlikely to exceed 209 Mtot in 1989.

   After a strong increase by 6.3 Mtot in 1988, coal imports are expected in 1989 to remain stable at a level close to 98 Mtot, a level which had already been reached for the first time in 1985. The share of imports in total coal resources will be 31.5% in 1989.

   Inspite of a 2 Mtot increase in coke consumption for steelmaking in 1988, the Community's coke production follows its regular downward trend and should be close to 50 Mtot in 1989.

6. List prices of coal and coke undertakings in the Community remained generally stable in 1988. Prices for imported coal, however, went up considerably. The indicative price for coking coal imports rose between the fourth quarter 1987 and the fourth quarter 1988 from 50.30 to 54.15 US$, or by 7.7%. Import prices for steam coal increased between the third quarter 1987 and the third quarter 1988 (average prices for the fourth quarter are not yet available) by 10.8%. The increases are due mainly to rising fob prices; freight rates, after an increase at the beginning of the year, stabilized afterwards. Expressed in national currencies, the price increase (10 - 12%) is even higher due to the strengthening of the US$ against the ECU.

7. Producer stocks of hard coal hardly changed between 1987 and 1988; they remained at a level of approximately 40 days' production. Coke stocks at coking plants on the other hand decreased by 17% between 1987 and 1988, reflecting the favourable development in the steel sector. At the beginning of 1989, coke stocks were equivalent to 44 days' production.

(million tonnes)

	1987 Actual	1988 Provisional 9.1.89	1989 Forecasts	% 1989/1988
Coal				
Resources:				
- Production	221.7	212.8	208.9	- 1.8
- Recoveries	5.0	5.4	5.3	- 1.9
- Imports from third countries	91.7	98.0	98.5	+ 0.5
Total	318.4	316.2	312.7	- 1.1
Deliveries :				
- to coking plants	71.6	69.3	66.6	- 3.9
- to power stations	201.2	196.1	197.3	+ 0.6
- to others	45.8	48.9	46.7	- 4.5
- Exports to third countries	1.7	2.2	1.4	- 36,4
Total	320.3	316.5	312.0	- 1.4
Lignite and Peat				
Resources :				
- Production and Imports	180.7	178.4	189.8	+ 6.4
Deliveries :				
- to briquetting plants	18.4	16.8	17.3	+ 3.0
- to power stations	156.3	157.5	166.7	+ 5.8
- to others (exports to third countries included)	3.2	4.5	4.0	- 11.1
Total	177.9	178.8	188.0	+ 5.1
Coke				
Resources:				
- Production	53.8	51.7	50.2	- 2.9
- Imports from third countries	0.9	1.2	1.0	
Total	54.7	52.9	51.2	- 3.2
Deliveries :				
- to the steel industry	44.9	47.0	45.7	- 2.8
- Others within the Community	7.1	6.0	5.6	- 6.7
- Exports to third countries	1.1	1.2	1.6	+ 33.3
Total	53.1	54.2	52.9	- 2.4

8. Since 1982, when the share of solid fuels in total energy consumption in the Community was 24.3%, this value has been continuously decreasing. It reached 21.7% in 1987 and, thanks to the stagnation in energy demand in 1988, remained constant in that year. For 1989, however, a further decline to 21.3% is to be expected: it will be the result of a substantial increase (+3%) in total energy demand, and of a smaller rise in solid fuel consumption (+1.4%). In order to reach the Community's energy policy objective for 1995, the share of solid fuel in total energy consumption would need to rise beyond the value of 1986, that is to say above 22.1%.

II. THE ECONOMIC OUTLOOK FOR THE COMMUNITY IN 1989

9. The economic performance of the Community is the most favourable for a long time. The average GDP growth of the twelve member countries in 1988, 3,7% in real terms, was the strongest recorded since the end of the 1970s; the growth of investment, 7 1/4%, was the highest for over two decades and the level of inflation, 3,7% about that of the 1960s; employment has increased by 1,2%, and - breaking an over ten years lasting trend - the unemployment rate is now declining. These positive developments are expected to continue in 1989. Growth will remain strong. Investment will prove to be the main driving force of growth, and unemployment will continue to fall - albeit slowly. However, inflation will accelerate somewhat for the Community as a whole, while developments in certain member countries raise some concern for the achievement of price stability and further convergence of inflation rates.

10. The significant improvement in the financial situation of the enterprise sector has finally shown up in a remarkable acceleration of investment in the second half of 1987 and throughout 1988. Economic growth in 1988 was further supported by some exceptional factors such as accomodating monetary policies and an exceptionally mild winter.

11. In the absence of these factors, output is expected to increase by almost 3% in 1989. Total investment will remain strong in 1989. Investment in construction may not increase at the same rate as in 1988 (6,5% in real terms), but will still record a strong rate of growth. Investment in equipment will continue to be supported by a high rate of capacity utilization and improved profitability and will slow down only marginally. In 1989 private consumption will lose some of its strength in volume terms as incomes may probably be negatively affected by expected higher inflation.

12. On the basis of the assumptions underlying the forecast, the Community's exports to the rest of the world - which had stagnated in 1987 and increased slowly in 1988 - will accelerate gradually. As imports continue to grow strongly, although at a slower pace than in 1988, the trade position of the Community will deteriorate slightly during the forecast period. The disequilibria in the external positions within the Community are expected to keep increasing.

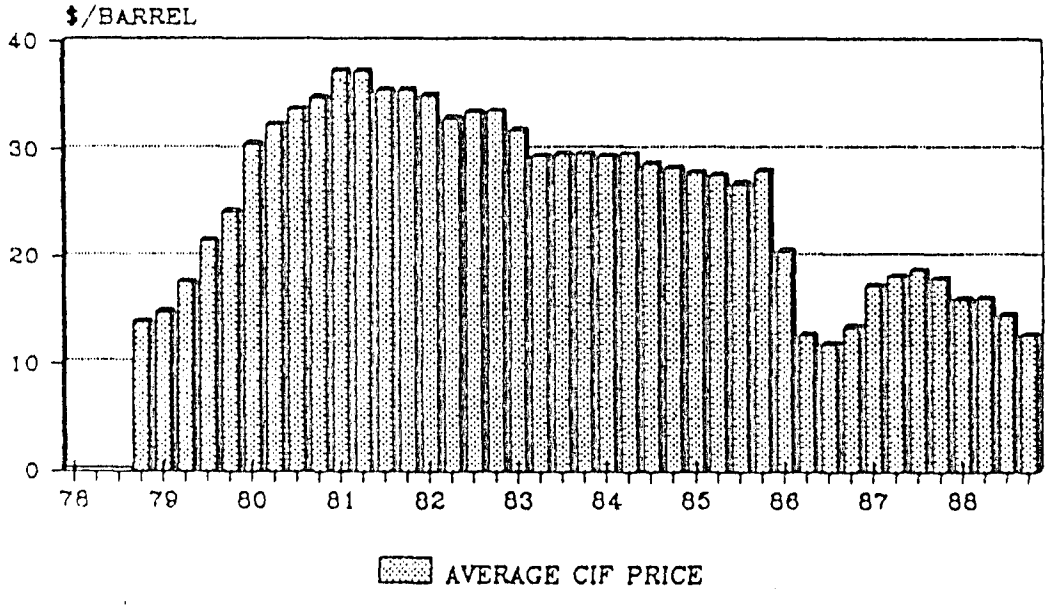
III. DEVELOPMENTS ON THE COMMUNITY ENERGY MARKETS

Energy Prices

13. The average price of crude oil imported by the Community dropped from nearly 18 US$/barrel in 1987 to slightly less than 15 US$/barrel last year. Except for some short-term variations during the spring of 1988, the oil price was on a downward movement throughout the period extending from August 1987 to October/November 1988. Since December last year oil prices are rising. The Vienna meeting of OPEC at end of November apparently supported higher prices, as the announcement to limit overproduction was received more seriously, and furthermore seems to materialize to a certain degree at least in the first weeks of this year. In terms of European currencies the decrease of oil prices was somewhat more pronounced (-19% compared with 1987 on ECU-basis) due to a slight devaluation of the US$. On the other hand, the recent revaluation of the US $ - if it lasts throughout the year - could contribute to an increased cost of the European oil supply.

As can be seen from the following graph, prices for crude oil varied substantially in the previous ten years or so. They were rather low in 1988 compared with previous years - including 1986, when the slump of oil prices took place.

COMMUNITY SUPPLIES OF CRUDE OIL



CEC : COAL DIRECTORATE

GRAPH 1

Average prices of oil products in general remained almost stable during 1988. One exception was the price for residual fuel oil which followed more closely the development of the crude oil price.

14. As a result of the indexing system included in the majority of gas contracts, gas prices followed the falling price of oil since mid 1987 with a certain time-lag. In consequence, the price for natural gas was down once more last year. Furthermore, linking delivered gas prices for power generation to world coal prices (like recently in the Netherlands) should exert a certain downward pressure on gas prices, as far as it gains acceptance in the years to come.

15. Although world coal prices are rising since mid 1987, they remain considerably lower than prices for hydrocarbons. The present upward tendency of coal prices came to a temporary halt in mid 1988, largerly on account of falling freight rates. At the end of last year, however, prices for imported coal were considerably higher than one year before, stemming mainly from increased fob prices resuming to rise in the second half of 1988. This matter is analysed more in detail later in the report.

Energy demand and supply

16. In spite of an economic growth rate of 3,7% in 1988, the demand for primary energy in the Community remained nearly stable (+0.1%) due to the extraordinary mild weather conditions last year. Although the mild winter continued throughout January this year, a higher energy demand is to be expected in 1989, only on account of further economic growth. Assuming normal weather conditions throughout the year the average growth in energy demand could be as high as 3%.

17. In 1988, demand for oil products increased by about 1%, stemming from rising need for transportation fuels, in particular. The share of oil in total energy consumption has remained stable at 44.8% which is in contrast to the Community's oil objective for 1995 (about 40% share). This year oil consumption is expected to rise further, but its growth should be slower than that of total energy consumption.

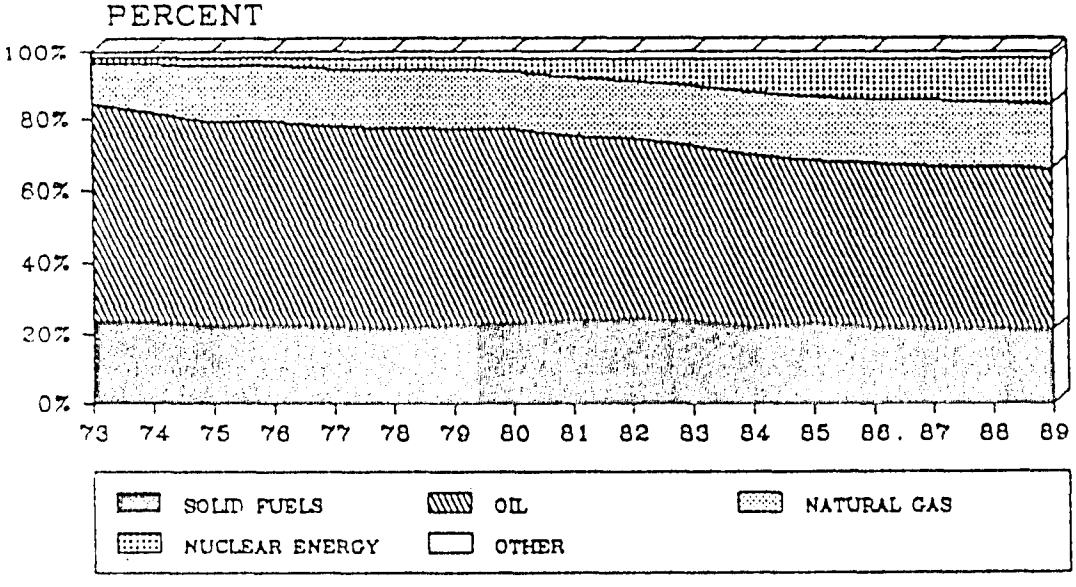
Demand for natural gas was down 3% in 1988 due to the mild winter. Accordingly its share in total energy consumption decreased to 18.0%. Depending on a return to "normal" weather conditions, it could increase slightly this year.

Utilisation of nuclear energy continued to grow considerably; electricity production from nuclear rose by some 8%, whereas total electricity demand was up only about 2%. Therefore, the

contribution of nuclear to electricity production attained its highest ever value of about 34%, compared with an estimated 37% for solid fuels.

18. Consumption of solid fuels (Table 1A and 1B) remained constant last year. The share of solid fuels in total energy demand continues its downward movement: from 22.1% in 1986 to 21.7% in 1988 and 21.3% in 1989. Thus, at present, it is uncertain that the objective to increase the share of solid fuels by 1995 beyond the 1986 value will be achieved.

GROSS INTERNAL ENERGY CONSUMPTION
EUR 12 FROM 1980



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GRAPH 2

19. As has been the case in the recent past, the supply of all forms of energy is largely sufficient and there is little danger that difficulties or major price rises will appear in the near future. A consequence of this favourable situation is, however, that efforts to improve energy efficiency are decreasing and that the Community objective in this respect is likely not to be reached.

IV. DEMAND FOR SOLID FUELS

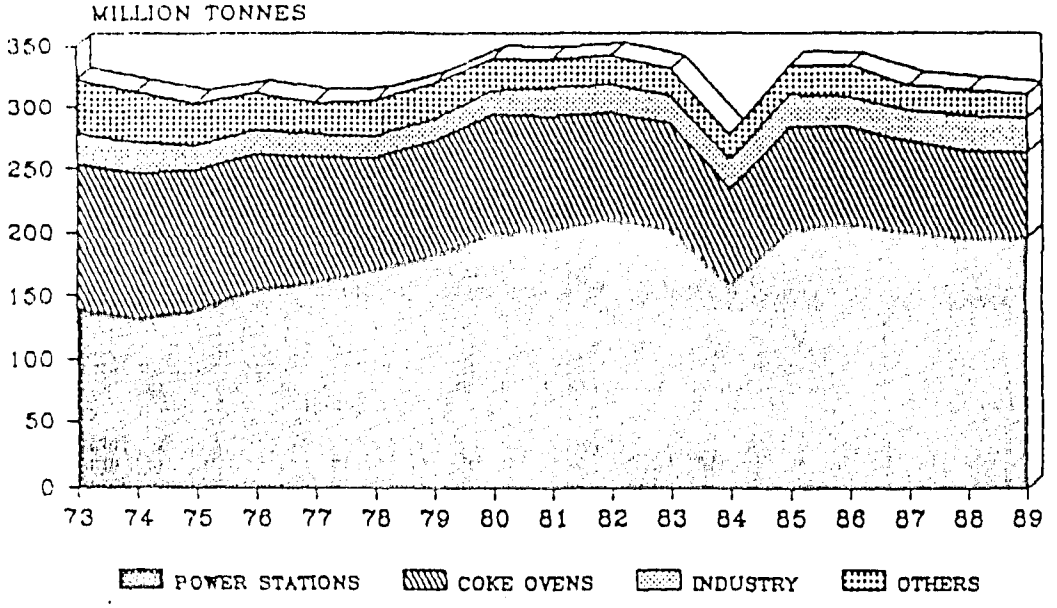
20. Demand by sector and country

(Table 3)

Total demand of hard coal in the 12 Member Countries of the Community has continued to fall slowly but regularly: in 1988 it amounted to 314.3 Mtot (-1.3% as compared to 1987) and the forecast for 1989 is 310.6 Mtot, i.e. a further decrease of the same order.

Deliveries to thermal power stations, which fell by 2.5% in 1988, should improve very slightly in 1989 (+0.6%). As for the coking sector, notwithstanding a sustained rate of production in the steel industry, deliveries of coking coal in 1988 went down by 3.2%. Although order books of steel undertakings are well filled for the first quarter and even first half-year of 1989, a new drop of 3 to 4% seems unavoidable. However, quantities of coal injected in the blast furnaces are increasing since the last few years at an annual rate of 700,000 to 800,000 t. At the end of 1988, they were slightly less than 3 Mtot and as this process is gaining momentum, this tonnage could reach from 3.5 to 4 Mtot during 1989. The market of the "other industries" is relatively stable: after an increase of 4.8% in 1988, it could go down slightly by 1.2% in 1989, which would nevertheless maintain this year's deliveries well over the 1987 figure. Finally, the disaffection for hard coal is relatively strongest in the domestic sector; the decline of 6.3% in 1988 should increase to over 11% in 1989. Even when adding the delivery figures to the patent fuel plants to those for the domestic sector, since the former products end up anyway with the same consumers, the loss of market share is continuous: of lesser importance in 1988 (-1.2%), it increases in 1989 reaching a drop of 1.6 Mtot or -9.5%.

DELIVERIES OF HARD COAL



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GRAPH 3

21. The evolution described above for the Community as a whole is in fact the result of two divergent tendencies. Coal producing countries which have traditionally been heavy consumers, witness a shrinking demand especially in the coking and domestic sectors. At best their total consumption remains stable. The non-producing countries generally increase their consumption mainly for electricity production. The fluctuation of the deliveries to the other industries, amongst which ciment plants and related industries take up the lion's share, depend to a large extent on the evolution of coal prices as compared to these of other fossil fuels, as well as on the level of activity in the building and engineering sector.

Moreover it should not be forgotten that the fluctuations of deliveries under review generally take place, for the years 1988 and 1989, within relatively small limits and are likely, at least for what concerns 1989, to be tainted by uncertainties. Stock movements can also alter the perception of the true market evolution.

The above sectors will be examined in greater detail below.

22. Cokemaking

(Tables 4 and 5)

Over these last years, coke is consumed in the Community for about 90% by the steel industry mainly in the blast-furnaces. The running of these furnaces has undergone during this period technical modification and improvements, tending to reduce the amount of coke required for the production of pig iron. One way to attain this goal is to inject into the blast-furnace cheaper and lower quality steam coal, which also has not been burdened with the relatively high cokemaking costs. In some cases up to 150 kilos of coke per tonne of pig iron have been substituted by about the same quantity of injected steam coal. Since this is a relatively recent technique and requires moreover important investments in ancillary plant and equipment, the average use of steam coal per ton of pig iron in the Community does not yet exceed a few scores of kilos. Nevertheless, this evolution together with the other techniques used to increase blast-furnace efficiency, has already resulted in a reduction of the specific consumption of coke per ton of pig iron of over 10% between 1985 and 1988.

Taking into account the high rate of activity in the steel industry in 1988, resulting in a total steel production of about 137 Mtot, i.e. 8 - 9% above that of 1987, it is not surprising that deliveries of coke to the steel plants have increased by 4.7% with regard to 1987. As it is doubtful that the present high production rate will continue during the whole of 1989, a reduction of 2.7% is forecasted for the current year. This is especially the case for Italy, where a drop in coke deliveries is expected, since the Italian steelworks have not yet completed restructering.

For the Community without Italy, the decrease will only be in the neighbourhood of 1.5%. The deliveries of coal to the coking plants, on the other hand, are in constant decline: -3.2% in 1988 and -3.9% in 1989. In 1988, stocks of coke were more than sufficient to supply the steel industry without any problems. In Germany especially, where stocks of coke are highest, the drop of deliveries in 1988 was most marked: -7.7% as compared to 1987.

23. The "other industries" and domestic sectors are also, to a certain extent, consumers of coke. For the first sector which is a non-homogenous group of all-assorted industries, the tendency is not evident: +1.3% in 1988 followed by -5.2% in 1989. This negative evolution is limited to Germany, France and Italy.

Coke for the domestic sector follows a parallel evolution to that of hard coal deliveries. The year 1988 seems to have been particularly black with a steep drop of 37.3%. This is, however, due to a certain extent to a discontinuity of statistical data for the U.K. For the Community without the U.K. the drop is less steep but nonetheless significant: -11.1%. For the Community as a whole a less pronounced drop in deliveries is forecasted for 1989, subject to weather conditions being normal.

24. Power stations

(Tables 6A and 6B)

Nuclear energy continues to increase its share. In 1987, 13.1% of total energy consumed was of nuclear origin. Its market share rose to 13.6% in 1988 and 14.1% are forecasted for 1989.

Total deliveries of hard coal to the power plants of the 12 Member countries fell by 2.5% in 1988, but should improve slightly in 1989 by 0.6%. Production and consumption of electricity continue to grow at a rate higher than that of gross energy consumption, while the commissioning of new nuclear power units has a tendency to slow down. It should not be forgotten either that coal stocks at the power plants are considerable, and that stock movements, whether increases or decreases, can easily affect deliveries' figures by several percent points for a given year, whereas actual consumption remains unchanged.

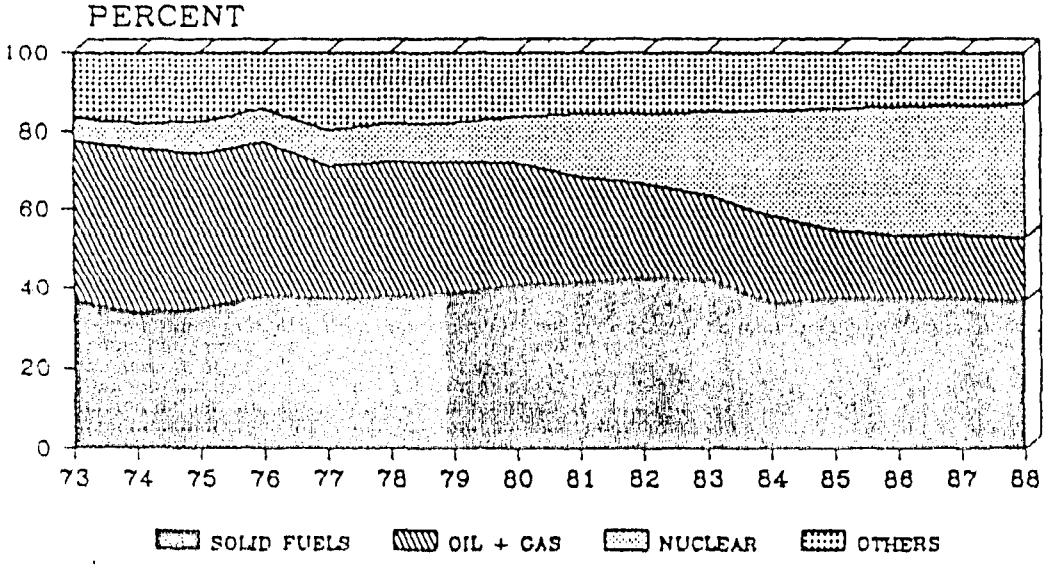
Any increase in electricity production, in as far as not met by an increased availability of nuclear power, benefits higher consumption of fuel-oil, gas or imported coal. In certain countries, a non-negligeable contribution comes from hydroelectricity, and 1988 was a very good year in that respect.

25. The overall picture given above varies considerably from one country to another. The fall of coal usage is most important in France, where the share of nuclear power reached 73% in 1988, and in Belgium where it exceeds 60%: -21.3% in 1988 and -2.8% in 1989 for France, +5.2% in 1988 and -6.4% in 1989 for Belgium. In Germany and Spain, coal deliveries to power stations decline only by a few percent points, while in the UK delivery figures remain stable.

    In the non-coal producing countries, deliveries of coal to power stations increase, especially in the Netherlands, Portugal and Ireland, where new coal-fired units have been commissioned in a recent past. The case of Denmark, where deliveries went down significantly in 1988 (-18.2%) to rebound in 1989 (+27%) to a higher level than that of 1987, is somewhat more complex. An important tonnage of fuel-oil was substituted to coal, whose deliveries have been postponed by one year. Moreover, Denmark purchased a significant amount of electrical energy from another Scandinavian country, which offered very interesting prices due to the abundant availability of hydroelectricity.

26. Deliveries of lignite and peat to power stations increased at the Community level. In Spain, however, deliveries in 1988 fell off by 30.4% due to outlet problems, production of hydroelectric power having been excellent and new nuclear capacity having been connected to the grid. In 1989, an improvement by 20% is forecasted, but 1987 figures will nevertheless not be attained. Deliveries in other countries remain stable, but lignite production in Greece is considerably developing. Deliveries to that country's power stations have increased by 13.8% in 1988, and a progression of the same order can be expected in 1989.

ELECTRICITY GENERATION
BY SOURCE



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GRAPH 4

27. Graph 4 shows the evolution since 1973 of the relative shares of the various primary energies in the production of electricity. In 1974, the share of solid fuels was only 34%, the lowest for the last 15 years: it reached a peak of 42% in 1982; in 1988, with 37%, it was half-way between the above two extreme values.

28. Other industries

(Table 7)

This sector increased its offtake of hard coal by 4.4% in 1988. A slight drop (-1.4%) is forecasted for 1989, the absolute figures remaining nevertheless above those of 1987. The denomination "other industries" covers in fact a great number of un-related sectors. Although industries related to the building and engineering sectors, especially such as cement plants (and to a very small extent brickovens g.i.) are by far the most important coal consuming group, the in-depth analysis of this sector remains difficult.

The level of activity in the building and engineering sectors, which have known a lean period for some years ago, has markedly improved to the great benefit of the cement plants. Their energy consumption rises along with their production. However, the "dry process" production technique, which requires less calories as well as lower-ash coal, is tending to replace the "wet process" there where the latter is till in use. Cement plants moreover are very sensitive to the price differential between fuel-oil/gas/coal not to speak of petroleum coke. Although the latter form of energy has a very high calorific value, it has not only advantages to offer: it is difficult to break and grind, has high sulphur contents and gives off a high temperature when burning, thereby limiting its use. It can be assumed that, at equal prices, coal remains the preference fuel of this industry.

Another aspect of the "other industries" group is that after the second oil shock, the reconversion to coal of industry was highly encouraged in certain countries like France and the UK, and price differential guarantees with regard to fuel-oil or gas were contractually given to new consumers. Since the fall of petroleum prices, this evolution has reversed. Hardly any new consumers are willing to switch to coal and a number of the industries which had been reconverted to coal, went back to fuel-oil or gas burning.

The consumption of coke by the other industries is largely concentrated in Germany and France. Since it goes down regularly in the former country (-16.6% in 1988 and -5.9% in 1989), and at best remains stable in the other countries, the final picture for the Community as a whole is rather dreary.

29. Domestic consumption

(Table 8)

This sector witnesses the relative strongest disaffection for solid fuels. There are a number of reasons for this situation, but it is impossible to quantify the specific influence of any one of them. Weather conditions in 1988 were favourable and oil and gas are in plentiful supply at prices which remain very competitive. The appeasement which took place in the Persian Golf area make brutal price variations less likely. There is also the slow disappearance of the aging population strata, which traditionally preferred this way of heating.

Even in the UK and Ireland, where domestic heating by solid fuels had long been very popular, a continous fall has taken place over the last years. At the Community level, deliveries will fall by 18.5% between 1987 and 1989. Consumption goes down in all countries albeit at a faster pace in some countries than in others.

30. Deliveries of lignite and peat

(Table 9)

Owing to the expansion of lignite production for power stations in Greece, the evolution for the Community as a whole is positive both in 1988 and in 1989 (+5.1%). In Spain, deliveries went down by 4.8 Mtot in 1988. This situation should improve in 1989, although 1987 figures will not be reached again. In the other countries deliveries remain stable although in Germany deliveries to patent fuel plants suffer also from the weak demand of the domestic sector.

V. COMMUNITY PRODUCTION OF SOLID FUELS

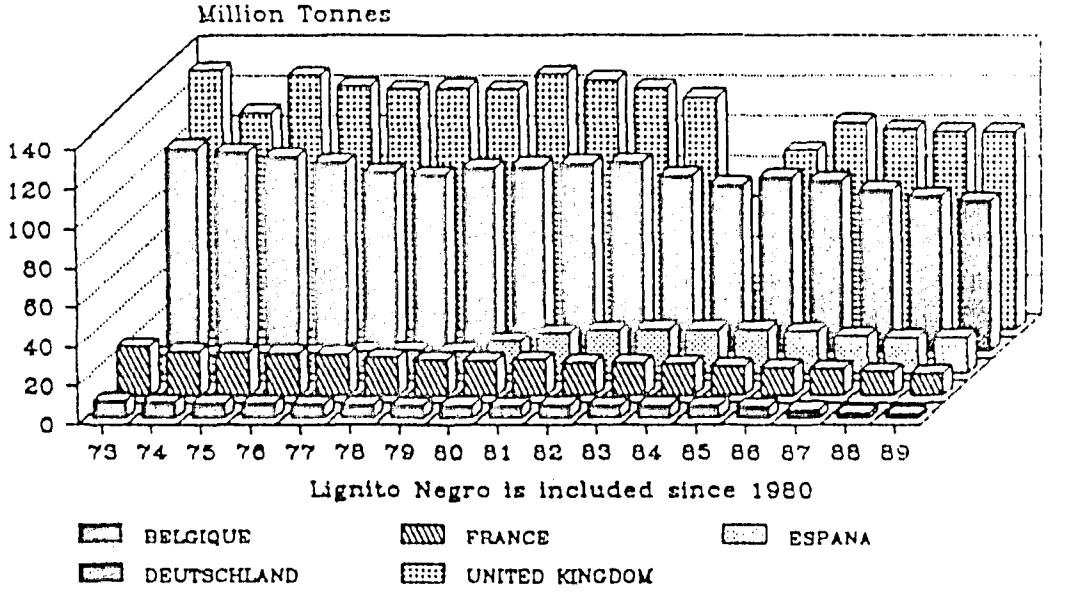
31. Hard coal

(Table 10)

Hard coal production in the Community amounted to 212.8 Mtot in 1988; it is down by 9 Mtot or -4% with regard to 1987. Production in all countries fell, but the drop was greatest in Belgium (-39.5%) and in France (-9.8%). Germany and Spain both lost about 4% of their production and the UK 1.7%.

The 1989 production figure is forecasted at 208.9 Mtot, down again by 1.9% with regard to 1988, mainly in Germany (-2.5 Mtot or -3.1%) and France (-0.9 Mtot or -7.5%).

HARD COAL PRODUCTION



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GRAPH 5

32. The sharp decrease in coal production in Belgium is due to the closure of 3 pits out of 5 for economic reasons. Germany has decided to gradually reduce its production in view of long term outlet problems both in the steel sector and in the heat market. In France, the Northern area is being closed down and other restructuring efforts are underway, as is the case in Spain. All these measures aim at reducing the increasing burden of State aids in support of the indigenous hard coal production.

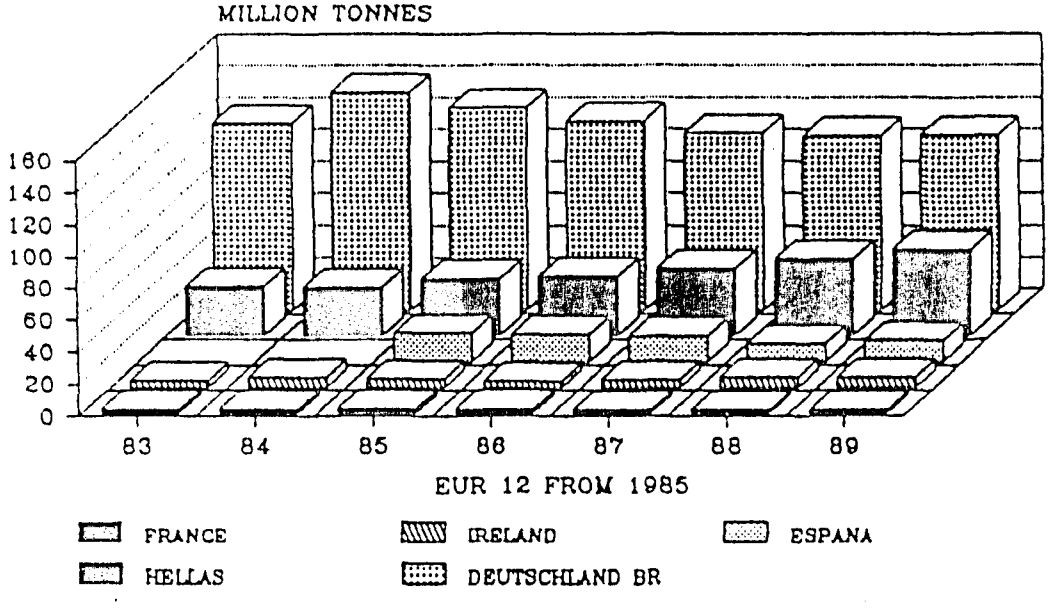
33. Lignite and Peat

(Tables 9, 26 and 27)

Lignite and peat production in the Community fell very slightly in 1988 (-1.1%). Production was lower in Germany (-3.2%) but especially in Spain (-33.4%) and Ireland (-38%). This negative evolution was practically compensated by production expansion of Greece solely: +10 Mtot or +25%.

Forecasted for 1989 is a production stabilisation in Germany, a market improvement in Spain (+20%) and Ireland (+46%) and a continuing expansion in Greece of +12%, which should bring the Community production to 187.7 Mtot (+6.4%), well over the 1988 figure.

DELIVERIES OF LIGNITE AND PEAT



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GRAPH 6

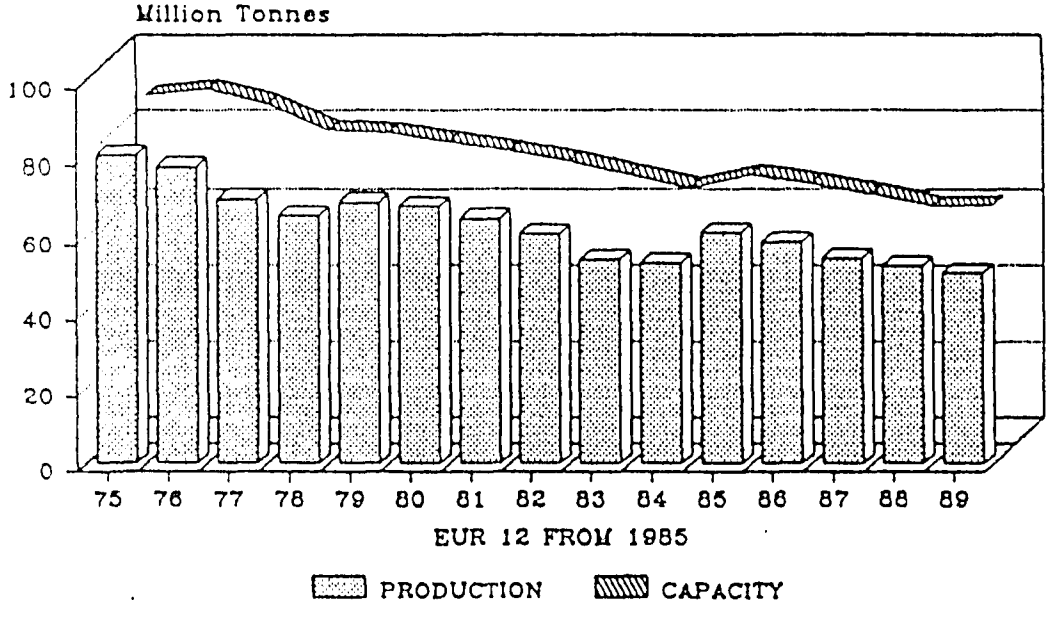
34. Coke

(Tables 11A and 12A)

Coking capacity in 1988 was 60,5 Mlot, a reduction of 5.2% as compared to the previous year. This capacity reduction took place mainly in the pithead coking plants which fell by 13.8% or minus 2.6 Mlot mainly in Germany and France.

Marginal variations are expected for 1989: a further drop of pithead capacity compensated by the commissioning of a coking plant that has been rebuilt in Spain.

COKE PRODUCTION AND CAPACITY



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GRAPH 7

35. Coking capacities shown in table 11B are nominal. However, a coking plant in working order can run only at a rate of 90 to 95% of its nominal capacity, since production stops due to technical, overhauling or other reasons must be allowed for. Few, if any, new coking plants have been built these last years, and several, especially among the pithead plants, have had their useful life extended beyond the normal life time because of lack of funds. The coke balance sheet for 1988 (Table 25) shows requirements in the order of 54.5 Mlot against a nominal production capacity of 60.5 Mlot. It could appear that the point of shortage is coming dangerously near.

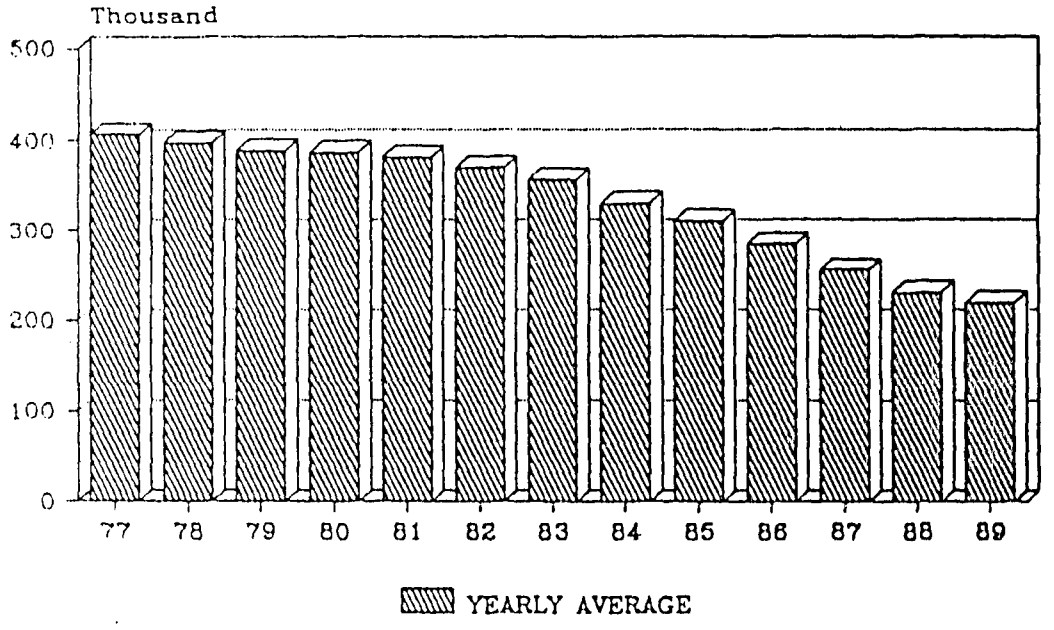
However, stocks are still plentiful; as shown by Table 21, stocks of coke at the producers' plants by the end of 1987 were 7.8 Mlot, of which 1.4 Mlot were taken up during 1988. The stock decrease of 1.7 Mlot forecasted for 1989 will also be possible. Moreover, the present rate of activity in the steel plants could slow down, and the drop in coke deliveries to the other industries and to the domestic sector could make more coke available to the steel industry. Finally, the displacement of coke by steam coal injected in the blast-furnaces is gaining momentum. In certain cases up to 25% of the former coke input has already been replaced by steam coal. And since the steel industry prefers to invest the limited funds it has available in valorization of plant and equipment down-steam from the steel convertors instead of up-steam, decision to build or replace coking plants remain still in abeyance for the time being. Local or regional problems may arise, but it does not appear that the supply of coke to the Community steel plants could be endangered in a near future.

36. Personnel and Productivity

(Tables 12A and A2B)

The reduction of the average yearly work force employed underground continued in 1988. At the Community level, 25,000 underground jobs were lost, i.e. a reduction of 10.4% for the sole year 1988. This evolution was the same in all producing countries, but the largest number of jobs were lost in the UK (-13,800) and Belgium (-4,600). This tendency is expected to slowdown but not to stop in 1989.

PERSONNEL EMPLOYED UNDERGROUND



CEC - COAL DIRECTORATE

GRAPH 8

Mine closures affect the less productive pits in the first place. Moreover when it has been decided to close a mine in a relative near future, underground reparatory work is reduced to a minimum, which makes more miners available for production or reduces the number of underground workers. In both cases, productivity increases. This partially explains why a reduction of the underground workforce by 10.4%, curtailed production by only 4%. At the Community level, production increased by about 6% in 1988. Forecasts for 1989 are not available and would in any case contain too much speculation.

37. State aids

Financial interventions of Member States in favour of the coal industry are subject of a special report; they are summarized in the following table :

	Total Intervention Million ECU			Intervention per tonne ECU		
	1986	1987	1988	1986	1987	1988
Belgium	279,3	232,6	202,5	58,18	53,22	73,91
Germany	3141,0	3897,1	4408,7 [1]	36,02	47,31	55,95
France	523,1	427,1	249,8	36,34	31,08	20,15
Spain	262,2 [2]	437,7	427,0	12,02	22,78	22,52
Portugal	4,5	1,8	1,7	21,23	6,90	6,30
United Kingdom	460,0	308,4	21,6	4,40	3,03	0,22
Total	4688,1	5304,7	5311,3	20,06	23,93	25,03

1. Provisional
2. Without OFICO payment

38. Trend in investments

(Table 13)

For 1988 investments made or committed as of 1.11.1988 (1,484 million ECU) for the extraction and preparation of hard coal increased by 6.8% with respect to real expenditures of the year before. However, taking into account that the percentage of effective realisations of planned investments is seldom 100% but closer to 80 or 90% of declared commitments, the total amount of effective investments in 1988 will most likely be equal to, or even be lower than in 1987.

This stagnation of investments at Community level hides, however, major differences between Member States. In the Federal Republic of Germany investments should have increased by 41% to 498 million ECU. In Spain the increase should be 30%, bringing total investments in this country up to 158 million ECU; for the sole area of Asturias the rise in expenditures should be close to 60%.

On the other hand investments in the United Kingdom and in France will have decreased by about 10% whereas in Belgium, as a result of the restructuring plan, investments will have dropped by 90% from 14.3 million ECU to 1.6 million ECU.

For 1989 present forecasts indicate a drop of 25% in investments in all producer countries except in Italy, where there are plans to reopen a mine in Sicily.

For more details please refer to the Commission document "Investments in the Community coalmining and iron and steel industries".

VI. PRICES FOR SOLID FUELS

39. (Table 14A)

The value of the US dollar as compared to Community currencies increased during 1988; its appreciation towards the ECU was 11%, (4 January 1988 to 2 January 1989).

40. Development of list prices

(Tables 14B and 14C)

These tables give tax-free, pithead list prices for various types of coal by coalfield in national currencies and US$. Price changes during 1988 were generally limited although the prices of imported coal have gone up, not only in US$ but even more when converted in european currencies, due to the appreciation of the US$.

Belgium: list prices for hard coal remained unchanged, while prices for coke increased by 4 to 25%. On 1.1.1989 coke prices increased again by 2 to 5%.

Germany: Partial increase of coal prices up to 3.5%. One mining company increased hard coal prices by 6.8 to 7.4%; another company decreased prices for anthracite by 1 to 5.4%. Coke prices remained unchanged.

France: The three French coal mining areas decreased coal prices by 1 to 21%. However, coking coal, power station coal and coke prices remained unchanged. On 1.1.1989 prices for foundry coke and special coke increased by 3.3 to 3.6%.

United Kingdom: Except for summer rebates and a small price decrease for domestic coal, prices have generally remained unchanged.

Netherlands: Coke prices decreased by 2 to 11% except for the 20/40 mm size. Prices increased by 5 Fl/t on 1.1.1989.

In Spain and Italy prices remained unchanged.

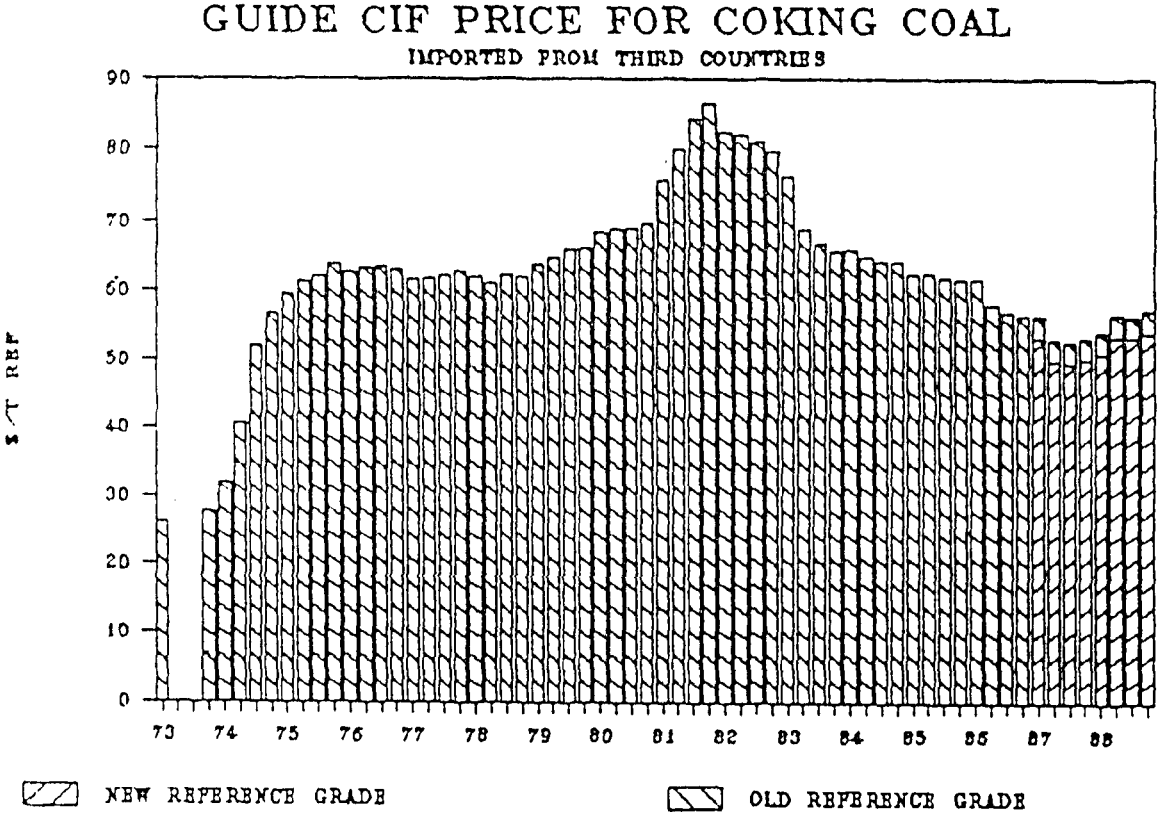
When reading table 14B one has to keep in mind the US$ appreciation which has a negative influence on all prices given in that currency.

41. Development in the prices of imported coal

a) coking coal

(Tables 15A and 15B) (graph 9)

The indicative price calculated by the Commission(1) started rising slowly as from the fourth quarter of 1987: it had reached $ 54.15 for the fourth quarter 1988, up by $ 3.85 or 7.7% from the same quarter of 1987. It was the first time since 1982 that prices rose again. This increase is mainly due to the strengthening of FOB prices. Ocean freight rates went up to a maximum of 7.75 US$/t for the second quarter of 1988, they dropped again to 6.90 US$/t for the fourth quarter. Their contribution to the increase of the indicative price was only 0.95 US$/t, which means that FOB prices went up by 2.90 US$/t or 6.5% between the fourth quarter of 1987 and the same quarter of 1988. Expressed in ECU the rise is 8,9% for fob prices and 10,1% for cif prices (based on exchange rates of 30 September of each year).



Graph 9

(1) Average cif price at large Community ports for coking coal from the USA, Australia, Poland and Canada under medium and long-term contracts (Decision 73/287/ECSC of 25 July 1973 and Decision 2064/86/ECSC of 30 June 1986.

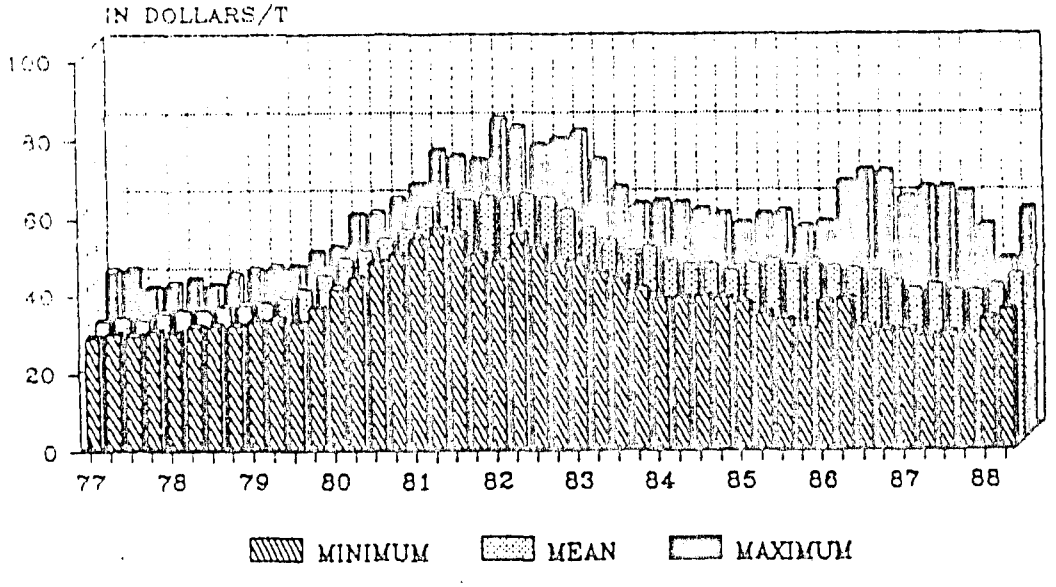
The quality corrections necessary to calculate the indicative price on the basis of an underlying standard quality were adapted on 1 January 1987 - for the first time since 1970 - to the current average quality of coking coal imports from third countries (see table 15, footnote (3)). The consequence is to cause a break (a drop of about 3 US$/t), as of 1 January 1987, in the series of indicative prices published since 1970. In order to avoid misunderstandings, the Commission's quarterly notification of the development of indicative prices to the coal and steel industries will include the old series of figures as well as the new figures calculated as from 1.1.1987.

42. b) Steam coal

(Tables 15A and 15C) (graph 10)

The average price cif main ports of the Community of steam coal imported from third countries went up from 42.50 US$/tce to 47.10 US$/tce or +10.8% for the period between the third quarter 1987 and the same quarter of 1988. But since the average US$ exchange rates for the third quarter 1987 were 0.88626 ECU and 0.88768 ECU for the third quarter 1988, the real price increase as felt within the Community was 12.3%. A comparison for the fourth quarters of these two years would show a similar price increase in European currencies; however, average price data for the fourth quarter 1988 are not yet available.

MEAN CIF PRICES OF STEAM COAL
IMPORTED FROM THIRD COUNTRIES



CEC : COAL DIRECTORATE

GRAPH 10

The relevant data concerning imports of steam coal into the Community are communicated via the Member State governments, in principle within 80 days after the end of each quarter (Decisions 77/707/ECSC and 85/161/ECSC).

43. Household coal prices

(Table 16)

This table shows the changes in price of anthracite (coke in Italy) delivered to the domestic consumers between July 1, 1987 and July 1, 1988. Prices decreased in Belgium, Italy and Spain, and rose in Germany and the UK. As these are prices for small quantities, they are not influenced by the price levelling tendency between the various countries which is apparent for large consumers.

VII. TRADE IN SOLID FUELS

44. World trade and production

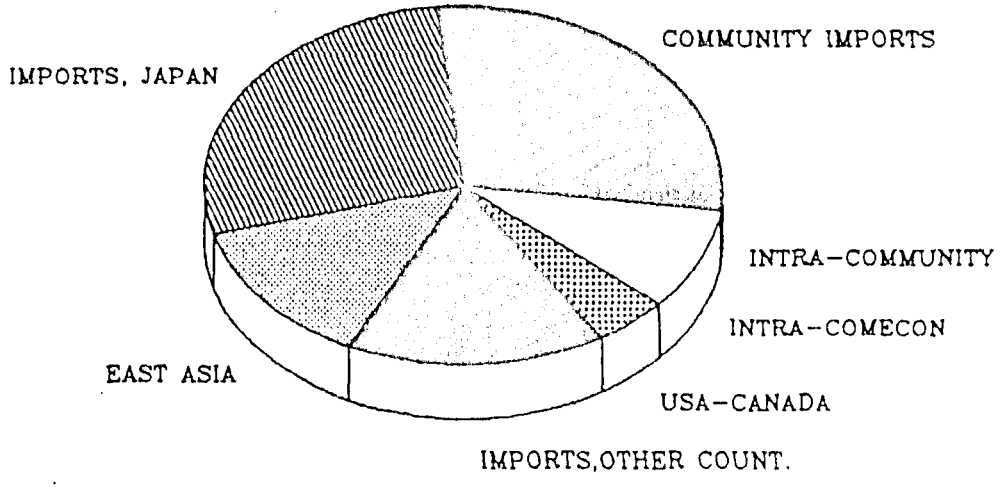
(Table 17) (graphs 11 and 12)

World production of hard coal is estimated to have been about 3.5 billion tonnes in 1988, up by 2.5% from the previous year. Production increased mainly in North-America and China. In nearly all other countries, production went up also, except in the Community and Japan, underprivileged because of the unfavourable geology of their coal deposits.

Seven countries, in decreasing order of production figures: China, USA, USSR, Poland, India, South-Africa and Australia, account for 89% of world production. The coal industry of the Community contributes for about 6% to the world production. Whereas the increased output of certain important producers (China, USSR, India) was rather intended for their domestic markets, other countries such as the USA and Canada raised production in order to increase exports as well. These two countries belong to two distinct groups of exporters. The USA - like the USSR, China, India and Poland - export only a relatively small part of their production, while Canada - like Australia and Colombia - sell more than half of their output overseas. Generally speaking these countries (to which South-Africa must be added) have very favourable coal deposits, which for a great part can be recovered by open-pit mining, and are highly mechanized. The producers of these countries have high fixed costs because of the large investments that must be amortized, and low variable costs as compared to European producers. It is this cost structure that determined, at least in a first phase, the reaction of these producers towards the fall of international prices due to the overcapacity on a world scale for coal production, which was itself brought about by an overestimation of how demand would develop after the first two oil crises. Producers operating at low full cost but whose fixed costs are relatively high, tend to fight longer and more bitterly for their market share, which inevitably pushes prices down. This situation prevailed these last five years until and including 1987.

Which are the events, either in a recent past or which have been maturing for some time, that seem to have reversed this trend in 1988? Some find their origin on the production side, others are due to the evolution of the consumption. They are often of marginal importance, but they nevertheless influence the market. We will list a few, without any claim to be exhaustive.

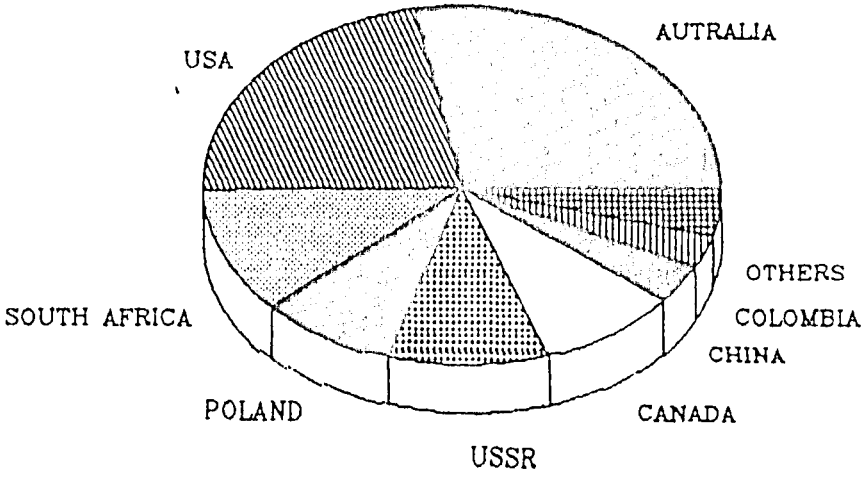
WORLD HARD COAL TRADE 1988



CEC : COAL DIRECTORATE

GRAPH 11

EXPORTING COUNTRIES 1988



CEC : COAL DIRECTORATE

GRAPH 12

On the production side: In the Community, production is decreasing regularly under the pressure of falling demand and depressed sales prices. Supplies of Comecon countries to the West are hardly increasing: Poland, which among Comecon countries is the most important supplier of the Community, has well-known problems to achieve its production target and it is generally expected that its exports to consumers in the West will decline in the years to come. Colombia and China have experienced difficulties in fulfilling their contractual supply obligations, and are not perceived any more as countries with large production surpluses. South-Africa, moreover, has had to look for and has found alternative markets to those lost in Europe , and the negative influence of its stepped-up sales efforts on international price levels have disappeared. In Australia, the little or totally unrewarding sales price levels have entailed the closing down of certain mines, and production curtailing at others. Mine owners push for rationalisation a.o. through changes in work pratices, which led to strikes that reduced production even further. Not since 1983 have any new substantial investments been made in Canadian coal mines, due to unrewarding prices levels.

On the consumption side: Last year witnessed a high level of demand on the international market, both for coking coal (+17 Mlot) and for steam coal (+4 Mlot). World steel production went up by 6%. In Japan (the world's leading hard coal importer), where steel industry depends practically entirely on imported coking coal, steel production went up by 7%, whereas it shot up by 12% in the USA and grew by 9% in the Community. In the industrialized countries, production and consumption of electricity increase at a higher than foreseen rate: electricity consumption of OECD member countries in the first half year of 1988 increased by 4.3% as compared to the same period of 1987. Moreover hard coal contribution to electricity production is expected to rise on a world level, a.o. because of reevaluation of new nuclear capacities that should become operational from now till the year 2000. Between 1986 and 1987, projection by I.E.A. member countries of nuclear generating capacity for 2000 declined by 50 gigawatts. In developing countries, coal imports have tripled between 1980 and 1987, from 23 Mlot in 1980 to 76 Mlot. Again this analysis is not exhaustive.

The resultant of these two developments is an increase in international prices both for coking coal and for steam coal: this increase is partly due also to the strenghening of ocean freight rates, which can be estimated to amount to 1 to 2 US$/t, although it is not uniform for all maritime trade routes nor for all sizes of carriers. Moreover, even if import coal has not become really scarce, it will nevertheless occasionally be hard to find disponibilities from China, Australia and Colombia f.i. It is certain, on the other hand, that countries like the USA and South-Africa can still increase their supplies in case of need.

Against this background of both, world production and consumption increasing by stages, the international seaborne trade of hard coal in 1988 has risen by 21 Mtot (+7.3%) as compared to the year before. A further rise is expected for 1989. Intra-Community exchanges, however, have decreased from 10 (in 1987) to 8 Mtot. Trade among Comecon countries remains stable at 35 Mtot, as is the case for USA-Canada exchanges at 15 Mtot, after a peak 17 Mtot in 1987.

In a medium term future, the US, which are also relatively high cost operators, will probably continue to play the role of "swing suppliers", especially as far as steam coal is concerned. Australia is at a disadvantage as far as sales to Europe are concerned because of higher freight rates: it is expected to concentrate on Pacific Rim countries. Colombia has already found its place in international exchanges, while China, when its problems mainly of logistics will have been solved, will bring only a limited contribution to world coal trade. Demand for South-African coal, geographically well situated to supply both the East and the West, will continue to be influenced by political considerations. It is not yet clear what role the new-comers such as Venezuela and Indonesia will be called upon to play in the international coal trade.

45. Community Trade with third countries

(Table 18) (graph 13)

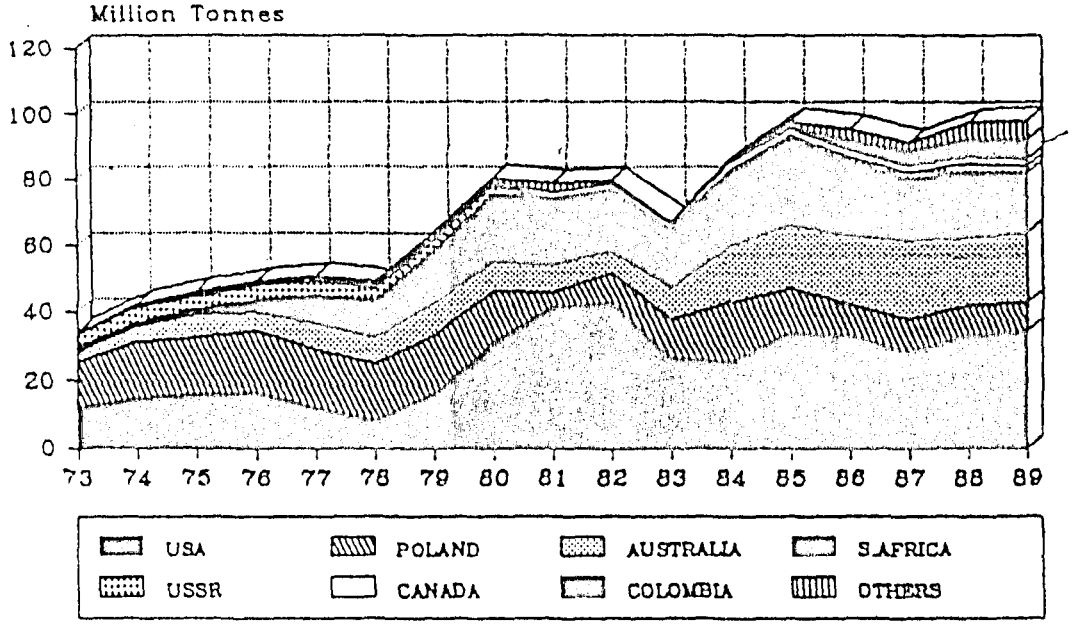
The high level of activity in the steel sector and the near constant level of coal deliveries to the electric power plants, coupled to a falling Community production, resulted in higher imports from third countries; plus 6.3 Mtot or +6.9% in 1988 as compared to 1987. For 1989 a slightly higher figure (+0.5 Mtot) is forecasted.

Not all Community Member States took part in this rise of imports. Germany reduced its imports by 11.7% in 1988, and this negative tendency will continue in 1989. France showed a decline of 7.1% in 1988, followed by a further -1.9% in 1989. The case of Denmark which imported 13.8% less in 1988, was already examined earlier; in 1989, imports are expected to jump by 28.7%, thereby pushing import figures up to 11% higher than in 1987. Spain, where power stations have agreed to take off a large part of the domestic steam coal production, reduced its imports by 4.5% in 1988, but a slight rise is foreseen for 1989.

Countries which have stepped-up their imports of hard coal are Belgium with 1.7 Mtot more (+22.7%) in 1988, as a result of a loss of indigenous production of the same magnitude. Italy increased its imports by 2.7 Mtot or 14.8% in 1988, but a drop of 2 Mtot is expected in 1989 for reasons given earlier in this report. The United Kingdom purchased 3.6 Mtot more (+41.9%) from third countries, reflecting a higher demand for coking coal (+1.6 Mtot) whereas its own production of this quality is on the wane. It also purchased more steam coal for its power stations, of

which significant tonnages were stocked. Finally, the Netherlands, Portugal and Ireland imported more coal mainly to satisfy higher demand from relatively new or recently converted coal-burning power plants.

HARD COAL IMPORTED FROM THIRD COUNTRIES



CEC : COAL DIRECTORATE

GRAPH 13

The US are still heading the list of outside suppliers: an extremely simplified view is that they have supplied 4/5th of the increase in Community demand. Australia, busy supplying its Pacific Rim customers, had to forgo 3.1 Mlot exports to the Community, or less 13.1%. South Africa shipped 1.1 Mlot more than in 1987, but its exports are expected to fall by 1.6 Mlot in 1989. Poland which has production problems of some magnitude and must serve its Comecon partners first, reduced its exports to the Community by 0.8 Mlot in 1988, and should lose another 0.3 Mlot in 1989. The USSR supplied 0.7 Mlot more in 1988, which should be followed by a 0.4 Mlot reduction in 1989. China supplied 1.1 Mlot more in 1988 and thus reached a total of 2.5 Mlot in 1988, to which another 0.3 Mlot should be added in 1989. Colombia reached 5.6 Mlot in 1988, up by 1 Mlot from 1987; the same growth is expected in 1989. Canada ships on an average 2 Mlot per year to the Community. Together the US, Australia, South-Africa and Poland covered 84.4% of Community requirements of import coal in 1988.

46. This situation will change very little in 1989: the above four countries should again supply about 83.5% of Community needs of import coal. As shown earlier, mainly Germany and Italy will reduce its intake of third countries' coal, which will be compensated by stepped-up deliveries to Denmark; the Netherlands will take up the 0.5 Mlot more foreign coal by which Community imports as a whole are expected to rise in 1989. Little change will occur in the remaining Member States' import situation.

47. Intra-Community trade

(Tables 19 and 20)

The decline in intra-Community coal trade will continue. After a further drop of 1.8 Mlot in 1988, another 0.9 Mlot are expected to fall away in 1989. Main causes are reduced intakes of German coking coal by France and Italy, and a drop of steam coal deliveries by the UK to Denmark, Ireland and Portugal.

Intra-Community coke trade, however, improved somewhat in 1988 mainly owing to supplies from Germany, which holds large stocks, to France, Luxembourg and Belgium.

The following table summarizes the trade developments for the period 1987 - 1989:

	(in Mlot)			In %	
	1987	1988	1989	1988/1987	1989/1988
Hard coal	9.9	8.1	7.1	- 18.4	- 11.5
Coke	3.7	4.0	3.8	+ 10.3	- 5.1

In 1988, intra-Community trade represented only 2.6% of total hard coal resources and 7.6% of coke resources of the Community.

VIII. STOCKS

(Table 21)

48. Producers' stocks of hard coal have practically undergone no change from one year to the other. They amounted to 24 Mtot at the end of 1987, and to 23.8 Mtot one year later. Since production fell by about 9 Mtot in 1988, as compared to 1987, these stocks represent about 40 calendar days of production. Detailed stock forecasts for 1989 are not yet available, but indications are that they should not increase significantly.

49. Producers' coke stocks went down from 7.6 Mtot at the end of 1987 to 6.3 Mtot a year later, representing about 44 calendar days of production. De-stocking took place mainly in Germany (-0.9 Mtot), and to some extent also in the UK (-0.2 Mtot), France and Italy (less 0.1 Mtot each). Stocks increased marginally in Spain and Belgium. Detailed stock projections for coke at the end of 1989 are not yet available.

IX. CONCLUSION

50. The regressive tendency of hard coal's share in the gross internal energy consumption of the Community, which was apparent during previous years, was halted in 1988 but is likely to continue in 1989.

The high level activity in the steel sector resulted in higher coke deliveries, even if deliveries of coal to the coking plants dropped by 3%. Steam coal deliveries for injection in the blast-furnaces, however, are on the increase. For 1989, everything will depend on the way economic activity develops in the steelmaking sector.

Deliveries to power plants have again dropped by 2.5% in 1988, but a slight improvement is forecasted for 1989. Certain countries seem to abandon entirely the nuclear option, while in others the development of new capacities is stopped, at least for the time being. Production and consumption of electricity are generally developing at a higher rate than foreseen, even in a recent past. The share of fuel oil and gas in electricity production fell slightly, according to early estimates, from 16.5% in 1987 to 16.4% in 1988. Nevertheless, deliveries of natural gas to power plants could increase in certain countries for economic, contractual or environmental reasons.

Deliveries to the "other industries" increased by 4.8% in 1988. In the absence of an exhaustive study of this sector, which does not have its place in the framework of the present report, this improvement may be credited to a large extent to the ciment-plants, which are themselves dependent on the activity in the building and engineering sectors, and therefore on the general level of economic activity. The forecasts for the latter being relatively optimistic, it can be hoped that the figures for 1988 will remain stable at least in the near future.

Only the domestic sector does not seem to hold much hope for recovery, unless prices for competitive fuels, fuel oil and gas, would rise sharply. Even in that case the time-lag that would be necessary to profoundly influence consumers'habits would be very long. No optimistic note can therefore be perceived for that sector for the foreseeable future, with an exception perhaps for district heating or heat distribution networks.

Finally, the year 1988 has witnessed a turning point in the evolution of international prices for coal, and therefore for coke. Since world consumption of hard coal increases regularly, and since the investors who financed the new coal mining capacities after the two first oil crises have, generally speaking, not obtained the expected returns, which is not conductive to the attraction of investors to new coal mining ventures as long as their profitability is not better ensured, available coal quantities could become less abundant in a near future. This would benefit the return to firmer price levels.

X. COMMUNITY ACTIONS RELATED TO SOLID FUELS

51. The Commission presented a report to the Council on the application by Member States of the Council Recommendations of 24 May 1983 concerning the encouragement of investment in the use of solid fuel in industry (83/250/EEC) and in public buildings and district heating (83/25/EEC). The Council examined the report during its session of 9 June 1988, and took note of the attention of the Commission to undertake a cost/benefit analysis on possible measures to promote the use of solid fuels. The Council asked the Commission to present, in due time, a new report on this subject.

The Commission also prepares a report (COM(88)541 final dated 20.10.1988) on the application of Community rules for State aid to the coal industry in 1987. The report was presented to the Council.

During its two meetings in 1988 the Energy Council also examined and approved in its broad lines the document COM(88)238 final on the "Internal Energy Market" and the document COM(88)174 final on "The main findings of the Commission's review of Member States' Energy policies".

52. Research and Development

Within the framework of ECSC research aids totalling 26.3 MECU were granted to projects in the fields of mining technology and coal upgrading.

Under the EEC programme for energy demonstration projects, aids totalling 3.1 MECU for projects in the field of liquefaction and gasification of solid fuels and 22.5 MECU for projects in the field of substitution of hydrocarbons by solid fuels were granted in 1988.

A sub-programme on solid fuel use is included in the current EEC Non-Nuclear Energy R & D programme. This topic is also included in the proposed follow-up R & D programme, JOULE.

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TABLE 1 A

GROSS INTERNAL ENERGY CONSUMPTION

COMMUNITY

15-Feb-89

	1987 Actual		1988 Provisional		1989 Forecasts	
	million toe	%	million toe	%	million toe	%
Solid fuels	230.2	21.7	230.5	21.7	233.7	21.3
Oil	476.5	44.8	476.9	44.8	489.7	44.6
Natural gas	198.3	18.7	192.0	18.0	199.7	18.2
Nuclear energy	138.5	13.0	144.9	13.6	154.2	14.1
Other	19.0	1.8	19.6	1.9	20.1	1.8
total	1062.5	100.0	1063.9	100.0	1097.4	100.0

Source : - Energy in Europe n. 12

SEC (89) 280 final / 2
36 (Français et espagnol)
35 and 36 (allemand et anglais)

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TABLE 1 B

Share of solid fuels in gross internal energy consumption

15-Feb-89

	Year	Hard coal		Lignite and peat		Total Solid Fuels	
		M Toe	%	M Toe	%	M Toe	%
E	73	194.489	20.87	27.529	2.95	222.018	23.82
U	74	187.700	20.62	29.336	3.22	217.036	23.84
R	75	166.917	19.42	27.188	3.16	194.105	22.58
	76	176.579	19.27	32.202	3.51	208.781	22.78
1	77	173.450	18.99	29.948	3.28	203.398	22.27
0	78	175.717	18.66	29.809	3.17	205.526	21.83
	79	191.291	19.39	31.859	3.23	223.150	22.62
E	80	202.458	19.75	35.541	3.47	237.999	23.22
U	81	200.988	20.27	37.515	3.78	238.503	24.06
R	82	197.263	20.46	37.341	3.87	234.604	24.34
	83	192.392	19.94	37.975	3.94	230.367	23.87
1	84	180.675	18.23	39.050	3.94	219.725	22.17
2	85	200.664	19.49	38.356	3.73	239.020	23.21
	86	195.695	18.71	35.795	3.42	231.490	22.13
	87	196.858	18.53	33.342	3.14	230.200	21.67
	88	196.858	18.50	33.642	3.16	230.500	21.67
	89	196.896	17.94	36.804	3.35	233.700	21.30

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TABLE 2

SHARE OF THE VARIOUS FORMS OF ENERGY IN GROSS INTERNAL CONSUMPTION OF ENERGY BY COUNTRY IN 1988

15-Feb-89

(Million Toe)

	Solid fuels	Petroleum products	Natural gas	Nuclear	Other	Total
BELGIQUE	9.5	19.2	7.1	10.6	-0.1	46.3
%	20.5	41.5	15.3	22.9	-0.2	100.0
DANMARK	7.1	9.0	1.5	0.0	0.5	18.1
%	39.2	49.7	8.3	0.0	2.8	100.0
DEUTSCHLAND (BR)	75.5	111.5	44.1	35.0	2.0	268.1
%	28.2	41.6	16.4	13.1	0.7	100.0
ESPANA	15.6	43.0	3.6	12.9	2.9	78.0
%	20.0	55.1	4.6	16.5	3.7	100.0
FRANCE	17.0	85.7	23.0	69.5	3.2	198.4
%	8.6	43.2	11.6	35.0	1.6	100.0
HELLAS	7.4	10.8	0.2	0.0	0.3	18.7
%	39.6	57.8	1.1	0.0	1.6	100.0
IRELAND	3.8	3.8	1.5	0.0	0.1	9.2
%	41.3	41.3	16.3	0.0	1.1	100.0
ITALIA	15.3	83.9	33.1	0.0	7.3	139.6
%	11.0	60.1	23.7	0.0	5.2	100.0
LUXEMBOURG	1.2	1.4	0.3	0.0	0.4	3.3
%	36.4	42.4	9.1	0.0	12.1	100.0
NEDERLAND	8.2	21.8	30.6	0.8	0.4	61.8
%	13.3	35.3	49.5	1.3	0.6	100.0
PORTUGAL	1.8	9.1	0.0	0.0	1.4	12.3
%	14.6	74.0	0.0	0.0	11.4	100.0
UNITED KINGDOM	68.1	77.7	47.0	16.1	1.2	210.1
%	32.4	37.0	22.4	7.7	0.6	100.0
EUR 12 1988	230.5	476.9	192.0	144.9	19.6	1063.9
%	21.7	44.8	18.0	13.6	1.8	100.0
EUR 12 1989	233.7	489.7	199.7	154.2	20.1	1097.4
%	21.3	44.6	18.2	14.1	1.8	100.0

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TABLE 3

COMMUNITY HARD COAL DELIVERIIES BY SECTOR AND BY COUNTRY

15-Feb-89

(Million tonnes)

	COMMUNITY				
	1987 Actual	1988 Provisional	1989 Forecasts	1988/1987 % Difference	1989/1988 % Difference
A. SECTOR					
- Thermal power stations (1)	201.2	196.1	197.3	-2.5	+0.6
- Coke ovens	71.6	69.3	66.6	-3.2	-3.9
- Iron and steel industry	2.6	4.3	4.3	+65,0	-
- Other industries	22.9	24.0	23.7	+4.8	-1.2
- Domestic sector and coal workers	14.2	13.3	11.8	-6.3	-11.3
- Patent fuel plants	2.9	3.6	3.5	+24.0	-2.8
- Own consumption at mines	0.6	0.6	0.5	-	-16.7
- Gasworks	-	0.1	-	..	..
- Others	2.6	3.0	2.9	+15.4	-3.3
Total	318.6	314.3	310.6	-1.3	-1.2
B. COUNTRY					
Belgium	14.0	14.0	13.5	-	-3.6
Denmark	11.9	9.9	12.3	-16.8	+24.2
Germany (FR)	84.4	81.0	78.9	-4.0	-2.6
Spain	27.5	27.3	27.0	-0.7	-1.1
France	27.5	24.9	23.9	-9.5	-4.0
Greece	1.6	1.5	1.5	-6.2	-
Ireland	3.2	3.1	3.0	-3.1	-3.2
Italy	20.0	22.0	19.9	+10.0	-9.5
Luxemburg	0.2	0.2	0.2	-	-
Netherlands	11.3	12.1	12.5	+7.1	+3.3
Portugal	2.7	3.3	3.4	+22.2	+3.0
United Kingdom	114.3	115.0	114.5	+0.6	-0.4
COMMUNITY	318.6	314.3	310.6	-1.3	-1.2

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

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TABLE 4

COKE DELIVERIIES BY SECTOR AND BY COUNTRY

15-Feb-89

('000 tonnes)

	COMMUNITY				
	1987 Actual	1988 Provisional	1989 Forecasts	1988/1987 % Difference	1989/1988 % Difference
A. SECTOR					
- Iron and steel industry	44847	46952	45699	4.7	-2.7
- Other industries	2683	2718	2578	+1.3	-5.2
- Domestic sector	3553	2228	2132	-37.3	-4.3
- Others	508	1012	932	+99.2	-7.9
Total	51591	52910	51341	+2.6	-3.0
B. COUNTRY					
Belgium	4961	5350	5150	+7.8	-3.7
Denmark	51	50	50	-2.0	-
Germany (FR)	16661	17580	17050	+5.5	-3.0
Spain	3047	3362	3112	+10.3	-7.4
France	8005	8100	7980	+1.2	-1.5
Greece	45	50	50	+11.1	-
Ireland	14	6	6	-57.0	-
Italy	6545	6728	5835	+2.8	-13.3
Luxemburg	1311	1200	1424	-8.5	+18.7
Netherlands	2216	2400	2300	+8.3	-4.2
Portugal	285	284	284	-0.3	-
United Kingdom (1)	8450	7800	8100	-7.7	+3.8
COMMUNITY	51591	52910	51341	+2.6	-3.0

(1) For 1988 and 1989, estimations of the Commision of European Communities

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TABLE 5

DELIVERIES OF HARD COAL TO COKING PLANTS (1)

15-Feb-89

('000 tonnes)

1987 : Actual 1988 : Provisional 1989 : Forecasts		National hard coal	Hard coal from other ECSC countries	Total ECSC hard coal	Hard coal from third countries	Total supplies
Belgium	1987	2030	704	2734	4170	6904
	1988					7000
	1989					6800
Germany (FR)	1987	26000	-	26000	-	26000
	1988					24000
	1989					23400
Spain	1987	945	-	945	2800	3745
	1988					3800
	1989					3700
France	1987	2250	1550	3800	5800	9600
	1988					9500
	1989					9350
Italy	1987	-	1451	1451	7773	9224
	1988					9598
	1989					7964
Netherlands	1987	-	465	465	3307	3772
	1988					4000
	1989					4000
Portugal	1987	-	240	240	148	388
	1988					374
	1989					374
United Kingdom	1987	5732	-	5732	6221	11953
	1988					11000
	1989					11000
Community	1987	36957	4410	41367	30219	71586
	1988					69272
	1989					66588

(1) For 1988 and 1989 the breakdown by origin is not available

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TABLE 6 A

DELIVERIES OF HARD COAL TO POWER STATIONS

15-Feb-89

(tonnes)

1987 : Actual 1988 : Provisional 1989 : Forecasts		Public power stations (1)					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	
Belgium	1987	2690	9	2699	1702	4401	328	-	4729
	1988					4725	250	-	4975
	1989					4375	280	-	4655
Denmark	1987	-	1105	1105	9779	10884	-	-	10884
	1988					8900	-	-	8900
	1989					11300	-	-	11300
Germany (FR)	1987	38564	378	38942	4208	43150	2387	5674	51211
	1988					42000	1800	5450	49250
	1989					41000	1600	5300	47900
Spain	1987	17410	-	17410	3000	20410	-	-	20410
	1988					19600	-	-	19600
	1989					19400	-	-	19400
France	1987	1816	30	1846	1749	3595	5608	-	9203
	1988					2400	4800	40	7240
	1989					2800	4200	40	7040
Greece	1987	-	-	-	189	189	-	-	189
	1988					50	-	-	50
	1989					-	-	-	-
Ireland	1987	45	33	78	1576	1654	-	-	1654
	1988					1652	-	-	1652
	1989					1777	-	-	1777
Italy	1987	-	68	68	10109	10177	-	-	10177
	1988					10300	-	-	10300
	1989					10500	-	-	10500
Luxemburg	1987	-	-	-	-	-	-	-	-
	1988					-	-	-	-
	1989					-	-	-	-
Netherlands	1987	-	100	100	6174	6274	-	-	6274
	1988					7000	-	-	7000
	1989					7500	-	-	7500
Portugal	1987	254	159	413	1500	1913	-	-	1913
	1988					2150	-	-	2150
	1989					2260	-	-	2260
United Kingdom	1987	83165	-	83165	1358	84523	40	NA	84563
	1988		-			85000	NA	NA	85000
	1989		-			85000	NA	NA	85000
Community	1987	143944	1882	145826	41344	187170	8363	5674	201207
	1988					183777	6850	5490	196117
	1989					185912	6080	5340	197332

(1) For 1988 and 1989 the breakdown by origin is not available

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TABLE 6 B

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

15-Feb-89

(Million tonnes)

	1987 Actual	1988 Provisional	1989 Forecasts	1988/1987 % Difference	1989/1988 % Difference
BELGIUM					
- Hard coal	4.7	5.0	4.7	+6.4	-6.0
DENMARK					
- Hard coal	10.9	8.9	11.3	-18.3	+27.0
GERMANY (FR)					
- Hard coal	45.5	43.8	42.6	-3.7	-2.7
- Black lignite	2.1	1.9	2.0	-9.5	+5.3
- Brown coal	92.6	92.7	93.0	+0.1	+0.3
SPAIN					
- Hard coal	20.4	19.6	19.4	-3.9	-1.0
- Brown coal	15.8	11.0	13.2	-30.4	+20.0
FRANCE					
- Hard coal	9.2	7.2	7.0	-21.7	-2.8
- Black lignite	1.4	1.3	1.4	-7.1	+7.7
- Brown coal	0.4	0.3	0.4	-25.0	+33.3
GREECE					
- Hard coal	0.2	-	-	-	-
- Brown coal	41.3	47.0	53.5	+13.8	+13.8
IRELAND					
- Hard coal	1.7	1.7	1.8	-	+5.9
- Peat	3.2	3.6	3.6	+12.5	-
ITALY					
- Hard coal	10.2	10.3	10.5	+1.0	+1.9
- Brown coal	1.6	1.6	1.6	-	-
NETHERLANDS					
- Hard coal	6.3	7.0	7.5	+11.1	+7.1
PORTUGAL					
- Hard coal	1.9	2.1	2.2	+10.5	+4.8
UNITED KINGDOM					
- Hard coal	84.5	85.0	85.0	+0.6	-
COMMUNITY					
- Hard coal	195.5	190.6	192.0	-2.5	+0.7
- Black lignite	3.5	3.2	3.4	-8.6	+6.2
- Brown coal *	154.9	156.2	165.3	+0.8	+5.8

* Including peat

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TABLE 7

HARD COAL AND COKE DELIVERIES TO OTHER INDUSTRIES
(EXCLUDING POWER STATIONS)

15-Feb-89

('000 tonnes)

	1987 Actual	1988 Provisional	1989 Forecasts	1988/1987 % Difference	1989/1988 % Difference
A. HARD COAL					
Belgium	1014	850	830	-16.2	-2.4
Denmark	398	500	500	+25.6	-
Germany (FR)	2808	2900	2800	+3.3	-3.4
Spain	2580	2500	2500	-3.1	-
France	4306	4200	3800	-2.5	-9.5
Greece	1315	1370	1400	+4.2	+2.2
Ireland	381	399	386	+4.7	-3.3
Italy	1290	1698	1400	+31.6	-17.6
Luxemburg	128	120	120	-6.3	-
Netherlands	452	400	400	-11.5	-
Portugal	391	776	780	+98.5	+0.5
United Kingdom	7928	8300 *	8770 *	+4.7	+5.7
COMMUNITY	22991	24013	23686	+4.4	-1.4
B. COKE					
Belgium	152	130	130	-14.5	-
Denmark	33	25	25	-24.2	-
Germany (FR)	1019	850	800	-16.6	-5.9
Spain	360	362	362	+0.6	-
France	635	700	650	+10.2	-7.1
Greece	29	15	15	-48.3	-
Ireland	14	6	6	-57.1	-
Italy	320	330	290	+3.1	-12.1
Luxemburg	-	-	-	-	-
Netherlands	216	150	150	-30.6	-
Portugal	19	-	-	-	-
United Kingdom	246	150 *	150 *	-39.0	-
COMMUNITY	3043	2718	2578	-10.7	-5.2

* Estimations of the Commission of the European Communities

TABLEAU 8

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

15-Feb-89

('000 TONNES)

1987 : Actual 1988 : Provisional 1989 : Forecasts		BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
A. HARD COAL, PATENT FUELS, COKE														
Hard coal	1987	1070	500	982	1415	2098	-	1156	-	2	-	-	7008	14231
	1988	910	400	800	1200	1860	-	1037	53	1	-	-	7000	13261
	1989	915	400	690	1200	1730	-	871	-	1	-	-	6000	11807
Patent fuels	1987	92	6	689	11	1056	-	-	-	1	4	-	775	2634
	1988	45	-	500	-	920	-	-	-	-	-	-	NA	NA
	1989	40	-	430	-	810	-	-	-	-	-	-	NA	NA
Coke	1987	34	13	944	-	233	-	-	-	1	-	-	2115	3340
	1988	20	25	750	-	200	-	-	141	-	-	-	1500	2636
	1989	20	25	680	-	180	-	-	115	-	-	-	1500	2520
Total	1987	1196	519	2615	1426	3387	-	1156	-	4	4	-	9898	20205
	1988	975	425	2050	1200	2980	-	1037	194	1	-	-	NA	NA
	1989	975	425	1800	1200	2720	-	871	115	1	-	-	NA	NA
% 1989/1987		-18.5	-18.1	-21.6	-15.8	-12.0	-	-10.3	..	-75.0	..	-	..	..
% 1989/1988		-	-	-12.2	-	-8.7	-	-16.0	-40.7	-	-	-	..	..
B. LIGNITE BRIQUETTES PEAT AND PEAT BRIQUETTES	1987	60	26	2342	-	100	60	377	-	23	-	-	-	2988
	1988	50	15	1820	-	80	60	NA	-	18	-	-	-	2043
	1989	50	15	1800	-	80	60	NA	-	18	-	-	-	2023

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TABLE 9

DELIVERIES OF LIGNITE AND PEAT BY SECTOR AND BY MEMBER STATE

15-Feb-89

(MILLION TONNES)

1987 : Actual
1988 : Provisional
1989 : Forecasts

RAW PRODUCTS

	POWER STATIONS			BRIQUETTING PLANTS			OTHERS			TOTAL		
	1987	1988	1989	1987	1988	1989	1987	1988	1989	1987	1988	1989
BELGIQUE	-	-	-	-	-	-	-	-	-	-	-	-
DANMARK	-	-	-	-	-	-	-	-	-	-	-	-
DEUTSCHLAND (BR)	92.6	92.7	93.0	16.8	15.0	15.5	1.6	1.7	1.5	111.0	109.4	110.0
ESPANA	15.8	11.0	13.2	-	-	-	-	-	-	15.8	11.0	13.2
FRANCE	1.8	1.6	1.8	-	-	-	0.2	0.2	0.2	2.0	1.8	2.0
HELLAS	41.3	47.0	53.5	0.3	0.5	0.5	1.2	1.3	1.0	42.8	48.8	55.0
IRELAND	3.2	3.6	3.6	1.2	1.3	1.3	0.2	1.3	1.3	4.6	6.2	6.2
ITALIA	1.6	1.6	1.6	-	-	-	-	-	-	1.6	1.6	1.6
LUXEMBOURG	-	-	-	-	-	-	-	-	-	-	-	-
NEDERLAND	-	-	-	-	-	-	-	-	-	-	-	-
PORTUGAL	-	-	-	-	-	-	-	-	-	-	-	-
UNITED KINGDOM	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-
COMMUNITY	156.3	157.5	166.7	18.3	16.8	17.3	3.2	4.5	4.0	177.8	178.8	188.0

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TABLE 10

HARD COAL PRODUCTION BY AREA

15-Feb-89 ('000 TONNES)

	1987	1988	1989
KEMPEN	4370	2645	2255
BELGIUM	4370	2645	2255
RUHR	63873	61790	60400
AACHEN	4979	4560	3860
IBBENBUREN	2361	2373	2290
SAAR + KLEINZECHEN	11167	10327	10050
GERMANY	82380	79050	76600
CENTRAL ASTURIANA	4340	4550	4550
BIERZO, VILLABLINO, NARCEA	5684	5350	5300
LEON, PALENCIA	2407	2200	2200
SUR	1922	1900	1900
ARAGON,CATALUNA, BALEARES	4860	4400	4250
SPAIN	19213	18400	18200
NORD-PAS-DE-CALAIS	1353	1250	630
LORRAINE	9900	9270	8900
CENTRE-MIDI	2490	1880	1940
FRANCE	13743	12400	11470
IRELAND	45	48	65
PORTUGAL	261	270	270
SCOTLAND	2950		
NORTHERN	10370		
YORKSHIRE	27310		
NORTH-WESTERN	10210		
MIDLANDS-KENT	28430		
SOUTH WALES	5860		
BC OPENCAST	14650		
LICENSED MINES + OPENCAST	1920		
UNITED KINGDOM	101700	100000	100000
E U R 1 2	221712	212813	208860

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TABLE 11 A

COKE PRODUCTION

15-Feb-89 (MILLION T PER ANNUM)

	coke production capacity	% difference compared with the previous year	hard coal consumption	coke production
1987 : Actual				
BELGIQUE	6.1	-1.6	6.9	5.2
DEUTSCHLAND (BR)	22.8	-6.7	26.0	19.8
ESPANA	4.3	-	3.7	2.9
FRANCE	8.4	-7.7	9.6	7.5
ITALIA	10.2	-	9.2	6.8
NEDERLAND	3.0	-3.2	3.8	2.7
PORTUGAL	0.3	-	0.4	0.3
UNITED KINGDOM	8.7 *	+2.4	12.0	8.7
COMMUNITY	63.8	-3.5	71.6	53.9
1988 : Provisional				
BELGIQUE	6.1	-	7.0	5.5
DEUTSCHLAND (BR)	21.0	-7.9	24.0	18.4
ESPANA	3.6	-16.2	3.8	2.9
FRANCE	7.7	-8.3	9.5	7.4
ITALIA	10.2	-	9.6	6.4
NEDERLAND	3.0	-	4.0	2.9
PORTUGAL	0.3	-	0.4	0.3
UNITED KINGDOM	8.6 *	-1.1	11.0	7.9
COMMUNITY	60.5	-5.2	69.3	51.7
1989 : Forecasts				
BELGIQUE	6.1	-	6.8	5.2
DEUTSCHLAND (BR)	20.6	-1.9	23.4	17.9
ESPANA	4.6	+27.8	3.7	2.8
FRANCE	7.6	-1.3	9.3	7.1
ITALIA	10.2	-	8.0	5.8
NEDERLAND	3.0	-	4.0	2.9
PORTUGAL	0.3	-	0.4	0.3
UNITED KINGDOM	8.4 *	-2.3	11.0	8.2
COMMUNITY	60.8	+0.5	66.6	50.2

* Without LTC for United Kingdom

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TABLE 11 B

COKING PLANT CAPACITY DISTRIBUTION

15-Feb-89 (Million tonnes)

	1987 Actual	1988 Provisional	1989 Forecasts
- Colliery plants	19.6	17.0	16.6
- Iron and steel industry	41.5	40.8	41.5
- Independent (*)	2.7	2.7	2.7
Total	63.8	60.5	60.8

* Without LTC for the United Kingdom

TABLE 12 A

PERSONNEL EMPLOYED UNDERGROUND
(yearly average)

15-Feb-89 ('000)

	1987 Actual	1988 Provisional	1989 Forecasts
Belgium	10.9	6.3	4.8
Germany (FR)	103.4	99.0	94.0
Spain (1)	36.5	36.0	36.8
France	15.0	13.0	11.0
Portugal	0.8	0.8	0.8
United Kingdom	89.8	76.0 *	72.0 *
Ireland	0.3	0.3	0.3
COMMUNITY	256.7	231.4	219.7

* Estimations of the Commission of the European Communities
(1) For Spain, data are those for the end of period

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TABLE 12 B

OUTPUT PER MAN/HOUR UNDERGROUNG

15-Feb-89 (Kg per man/hour)

	1987 Actual	1988 Provisional	1989 Forecasts
Belgium	316	338	356
Germany (FR)	616	630	650
Spain (1)	291	292	294
France	503	650	725
Portugal	NA	NA	NA
United Kingdom	577	633	NA
COMMUNITY	541	560	NA

NA : Not available
(1) All Spanish coal-mining undertakings

TABLE 13

INVESTMENTS IN THE COAL INDUSTRY
(COAL EXTRACTION AND PREPARATION)

15-Feb-89 (million ECU)

	1987 Actual	1988 Provisional	1989 Forecasts
Belgium	14.3	1.6	-
Germany (FR)	353.7	497.9	269.8
Spain	121.1	157.7	74.0
France	62.2	58.6	50.6
Italy	39.1	48.1	75.7
Portugal	0.8	2.4	0.3
United Kingdom	798.0	717.9	628.1
COMMUNITY	1389.2	1484.2	1098.5

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TABLE 14 A

Exchange rates : US $ - European currencies

1 US Dollar =	FB	DKR	DM	PTA	FF	DR	LIT	FL	ESC	£	ECU
a. 4th January 1988	33.12	6.0940	1.5815	108	5.352	126.13	1166.25	1.7791	129.958	0.5328	0.7672
b. 1st July 1988	38.1775	6.9235	1.8223	121.65	6.142	145.87	1352.75	2.0547	148.777	0.588235	0.8784
c. 2nd January 1989	37.09	6.8350	1.7685	113.12	6.0385	147.32	1306	1.9965	146.15	0.5529	0.8514
Difference in % c/a	+ 12	+ 12	+ 12	+ 5	+ 13	+ 17	+ 12	+ 12	+ 12	+ 4	+ 11

TABLE 14 B

List prices of Community coal pit-head, excl. V.A.T., at 1.1.88, 1.7.88 and 1.1.89 ($/mt)

15-Feb-89

GRADE	Screen size	at	Ruhr	Aachen	Saar	Belgium	Nord et P.C.	Lorraine	South Wales	Scottish	S.York-shire	Oviedo	Leon	List Prices max.	List Prices min.	range %
Anthra-cites	Nuts	1.1.88	247.47	250.00	-	-	251.03	-	203.77	-	-	-	157.41	251.03	157.41	59.5
	20/30 m/m	1.7.88	214.84	214.84	-	-	210.91	-	183.67	-	-	-	139.75	214.84	139.75	53.7
		1.1.89	220.90	220.90	-	-	214.40	-	196.36	-	-	-	150.28	220.90	150.28	47.0
Lean coal	Nuts	1.1.88	-	239.87	-	-	-	-	164.72	-	-	-	148.15	239.87	148.15	61.9
	20/30 m/m	1.7.88	-	208.24	-	-	-	-	148.47	-	-	-	131.52	208.24	131.52	58.3
		1.1.89	-	214.12	-	-	-	-	158.73	-	-	-	141.44	214.12	141.44	51.4
Semi-bituminous	Nuts	1.1.88	198.73	231.65	-	-	-	-	-	-	-	-	-	231.65	198.73	16.6
	10/20 m/m	1.7.88	172.53	201.10	-	-	-	-	-	-	-	-	-	201.10	172.53	16.6
		1.1.89	177.40	213.93	-	-	-	-	-	-	-	-	-	213.93	177.40	20.6
Long flame	Nuts	1.1.88	179.75	-	196.20	150.97	-	126.54	-	126.98	-	152.78	-	196.20	126.54	55.0
	30/50 m/m	1.7.88	156.04	-	170.33	130.97	-	99.35	-	114.46	-	135.64	-	170.33	99.35	71.4
		1.1.89	160.45	-	178.53	134.81	-	100.99	-	122.36	-	145.86	-	178.53	100.99	76.8
Long flame	Nuts	1.1.88	179.75	-	-	122.28	-	125.23 *)	-	127.74	123.02	-	-	179.75	122.28	47.0
	6/10 m/m	1.7.88	156.04	-	-	106.08	-	95.11 *)	-	115.14	110.88	-	-	156.40	95.11	64.1
		1.1.89	160.45	-	-	109.19	-	96.69 +)	-	123.09	118.55	-	-	160.45	96.69	65.9
Bituminous Coking coal		1.1.88	170.57	193.99	193.04	106.94	-	119.81	122.26	-	-	-	-	193.99	106.94	81.4
		1.7.88	148.08	168.41	167.58	92.78	-	104.40	110.20	-	-	-	-	168.41	92.78	81.5
		1.1.89	154.86	176.84	174.01	95.50	-	106.13	117.82	-	-	-	-	176.84	95.50	85.2
Coke	Blast furnace	1.1.88	242.41	276.58	261.39	144.93	204.67	199.07	184.72	184.72	184.72	-	-	276.58	144.93	91.0
	> 40 m/m	1.7.88	210.44	240.11	226.92	132.28	-	173.45	166.50	166.50	166.50	-	-	240.11	132.28	81.5
		1.1.89	216.38	246.89	233.33	142.90	-	176.32	178.00	178.00	178.00	-	-	246.89	142.90	72.8

Dollar exchange rate	DM	BF	FF	£	PTA
4.1.1988	1.58	33.120	5.35	0.530	108.00
1.7.1988	1.82	38.177	6.14	0.588	121.65
2.1.1989	1.77	37.090	6.04	0.550	113.12

Power stations : *) 144.86/151.59 $/t *) 126.22/132.08 $/t +) 128.31/134.27 $/t

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TABLE 14 C

List prices of Community coal, excl. V.A.T., at 1.1.88, 1.7.88 and 1.1.89 in national currencies/mt

15-Feb-89

GRADE	Screen size	at	Ruhr	Aachen	Saar	Belgium	Nord et P.C.	Lorraine	South Wales	Scottish	S.York-shire	Oviedo	Leon
Anthra-cites	Nuts 20/30 m/m	1.1.88	391.00	395.00	-	-	1343	-	108.00	-	-	-	17000
		1.7.88	391.00	391.00	-	-	1295	-	108.00	-	-	-	17000
		1.1.89	391.00	391.00	-	-	1295	-	108.00	-	-	-	17000
Lean coal	Nuts 20/30 m/m	1.1.88	-	379.00	-	-	-	-	87.30	-	-	-	16000
		1.7.88	-	379.00	-	-	-	-	87.30	-	-	-	16000
		1.1.89	-	379.00	-	-	-	-	87.30	-	-	-	16000
Semi-bituminous	Nuts 10/20 m/m	1.1.88	314.00	366.00	-	-	-	-	-	-	-	-	-
		1.7.88	314.00	366.00	-	-	-	-	-	-	-	-	-
		1.1.89	314.00	378.66	-	-	-	-	-	-	-	-	-
Long flame	Nuts 30/50 m/m	1.1.88	284.00	-	310.00	5000	-	677	-	67.30	-	16500	-
		1.7.88	284.00	-	310.00	5000	-	610	-	67.30	-	16500	-
		1.1.89	284.00	-	316.00	5000	-	610	-	67.30	-	16500	-
Long flame	Nuts 6/10 m/m	1.1.88	284.00	-	-	4050	-	670 [1]	-	67.70	65.20	-	-
		1.7.88	284.00	-	-	4050	-	584 [1]	-	67.70	65.20	-	-
		1.1.89	284.00	-	-	4050	-	584 [1]	-	67.70	65.20	-	-
Bituminous Coking coal		1.1.88	269.50	306.50	305.00	3542	-	641	64.80	-	-	-	-
		1.7.88	269.50	306.50	305.00	3542	-	641	64.80	-	-	-	-
		1.1.89	274.10	313.00	308.00	3542	-	641	64.80	-	-	-	-
Coke	Blast furnace > 40 m/m	1.1.88	383.00	437.00	413.00	4800 [0]	1095	1065	97.90	97.90	97.90	-	-
		1.7.88	383.00	437.00	413.00	5050	-	1065	97.90	97.90	97.90	-	-
		1.1.89	383.00	437.00	413.00	5300	-	1065	97.90	97.90	97.90	-	-

[0]) CARCOKE

[1]) Power stations : 775/811 FF

TABLE 15 A

AVERAGE CIF PRICES FOR COAL IMPORTED FROM THIRD COUNTRIES

(US $)

	first quarter 1987	Second quarter 1987	Third quarter 1987	Fourth quarter 1987	first quarter 1988	Second quarter 1988	Third quarter 1988	Fourth quarter 1988
A. STEAM COAL (1)								
NCV (Kj/Kg)	26200	26403	26356	26154	26524	26282	26282	
- per tonne (t=t)	38.62	39.65	38.22	38.01	39.69	42.33	42.53	..
- per tonne = 29.3 GJ	43.20	44.00	42.50	42.60	43.85	47.20	47.10	..
B. COKING COAL (2)								
NCV (Kj/Kg)	29386	29386	29386	29386	29386	29386	29386	29386
- per standard tonne (3) (4)	53.40	50.10	49.75	50.30	51.30	53.70	53.45	54.15
- per tonne = 29.3 GJ	53.25	49.95	49.60	50.15	51.15	53.55	53.30	54.00
Ratio B/A (%) per tonne = 29.3 GJ	123	114	117	118	117	113	113	

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

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

(3) Specification of standard quality : ashes 7.5%, water 8%, volatile matters 26%

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

1970 17.50	1974 31.90	1978 62.10	1982 82.45	1986 61.90
1971 23.90	1975 59.55	1979 63.95	1983 76.25	1987 53.40
1972 23.65	1976 62.75	1980 68.50	1984 66.20	1988 51.30
1973 26.05	1977 61.65	1981 75.70	1985 62.75	1988 54.15 (1.10)

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TABLE 15 B

Coking Coal Imports

Guide price in national currencies per tonne of 29.4 GJ, new reference grade

Reference date :	USD	DM	FB	FF	£	FL	ESC	PTA	LIT
1. Quarter 1987	53.40	102	2130	339	36	116	7720	6970	71400
2. Quarter 1987	50.10	91	1885	303	31	103	7050	6390	64900
3. Quarter 1987	49.75	91	1880	302	31	102	7100	6280	65680
4. Quarter 1987	50.30	93	1925	309	31	104	7300	6150	66900
1. Quarter 1988	51.30	81	1700	275	27	91	6670	5540	59800
2. Quarter 1988	53.70	89	1870	303	28.5	100	7280	6010	66300
3. Quarter 1988	53.45	97	2050	328	31	102	7400	6050	72300
4. Quarter 1988	54.15	101	2115	344	32	114	8310	6680	75200
Difference in % 4. Quarter 1988 / 1. Quarter 1987	+1.4	-1.0	-0.7	+1.5	-11.1	-1.7	+7.6	-4.2	+5.3

TABLE 15 C

Average price for imported steam coal (in national currencies per tonne of 29.3 GJ)

Reference date :	USD	DM	FB	FF	FL	UK £	DR	PTA	ESC	DKR	IR £
2nd Quarter 1987	44.00	79.68	1652.00	265.72	89.87	26.94	5905.00	5577.00	6189.00	300.07	29.77
3rd Quarter 1987	42.50	77.81	1615.00	259.57	87.62	26.26	5884.00	5297.00	6101.00	296.57	29.10
4th Quarter 1987	42.60	73.80	1541.00	249.30	83.04	24.70	5754.00	4933.00	5925.00	284.64	27.69
1st Quarter 1988	43.85	72.55	1517.00	245.19	81.51	24.35	5794.00	4917.00	5940.00	278.14	27.28
2nd Quarter 1988	47.20	79.75	1658.00	270.26	89.43	25.37	6372.00	5290.00	6515.00	305.44	29.83
3nd Quarter 1988	47.10	86.48	1807.00	290.69	97.53	27.98	6816.00	5757.00	6960.00	329.93	32.28
Difference in % 3nd Quarter 1988 / 3nd. Quarter 1987	+10.8	+11.1	+11.9	12.00	+11.3	+6.5	+15.8	+8.9	+14.1	+11.2	+10.9

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TABLE 16

DELIVERED PRICE FOR DOMESTIC COAL

(INCLUDING TAXES)

17-Feb-89 (Ecu/tce)

	1 July 1987	1 July 1988	+/- %
Belgium	267.91	255.74	-4.5
France	312.16	..	..
Germany (FR)	265.45	272.17	+2.5
Ireland	162.57	164.23	+1.0
Italy	286.82	279.73	-2.5
Netherlands	310.58	..	..
Spain	148.55	147.15	-0.9
United Kingdom	195.27	206.18	+5.6

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TABLE 17

WORLD COAL PRODUCTION AND TRADE

17-Feb-89 (Million tonnes)

I. WORLD TRADE BY COUNTRY AND REGION	1986	1987	1988 (1)	1989 (2)
Community imports from third countries	95	92	98	99
Imports, Japan	91	93	102	105
Imports, NIC-East Asia (3)	38	43	49	52
Imports, other countries	54	60	60	61
Sub-total coal sea-borne trade (a)	278	288	309	317
Coking coal	(137)	(143)	(160)	(163)
Others	(141)	(145)	(149)	(154)
Intra-Community coal trade	11	10	8	8
Intra-Comecon trade (4)	38	34	34	35
United States - Canada trade	14	15	17	15
Sub-total coal regional trade (b)	63	59	59	58
Total : Coal world trade (c)	341	347	368	375
(c) = (a) + (b)				
Coking coal	(162)	(167)	(184)	(186)
Others	(179)	(180)	(184)	(189)
Difference from year to year (%)	+0.6%	+1.8%	+6.1%	+1.9%
II. WORLD PRODUCTION OF COAL	**1986**	**1987**	**1988**	
Western Europe	234	222	213	
(EUR)	(234)	(222)	(213)	
North America	772	794	828	
(United States)	(741)	(761)	(790)	
(Canada)	(31)	(33)	(38)	
USSR	587	595	606	
China	853	889	915	
Poland	192	193	193	
South Africa	177	178	184	
Australia	139	145	147	
India	163	178	190	
Japan	16	13	11	
Latin America	31	34	37	
Rest of the World	147	150	153	
Total world production of coal (d)	3311	3391	3477	0
III. SEA-BORNE TRADE OF COAL IN % OF WORLD PRODUCTION : (a)/(d)	8.4%	8.5%	8.9%	

(1) Estimates
(2) Forecasts
(3) Newly Industrialising Countries in East Asia: Hongkong, South Korea, Taiwan
(4) Countries with centrally planned economy (Bulgaria, Czechoslovakia, East Germany, Hungary, Poland, Romania, USSR)

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TABLE 18

HARD COAL FROM THIRD COUNTRIES

1987 -1989

17-Feb-89 (Million tonnes)

	1987 Actual	1988 Provisional	1989 Forecast
A. BY COUNTRY OF DESTINATION			
Belgium	7.5	9.2	9.0
Denmark	10.9	9.4	12.1
Germany (FR)	7.7	6.8	6.1
Spain	8.8	8.4	8.6
France	11.1	10.4	10.2
Greece	1.8	1.8	1.8
Ireland	2.4	2.8	2.8
Italy	18.2	20.9	18.9
Luxemburg	0.1	0.1	0.1
Netherlands	12.4	13.1	13.6
Portugal	2.2	2.9	3.3
United Kingdom	8.6	12.2	12.7
COMMUNITY	91.7	98.0	98.5
B. BY COUNTRY OF ORIGIN			
USA	28.7	33.6	34.7
Canada	2.0	2.0	2.1
Australia	23.7	20.6	20.9
South Africa	18.7	19.8	18.2
Poland	9.5	8.7	8.4
USSR	1.8	2.5	2.1
China	1.4	2.5	2.8
Colombia	4.6	5.6	6.4
Others	1.3	2.7	2.9
COMMUNITY	91.7	98.0	98.5

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TABLE 19

TREND OF INTRA-COMMUNITY TRADE IN HARD COAL
1987 - 1989

17-Feb-89

('000 TONNES)

TO	FROM	BELGIQUE	DANMARK	DEUTSCHLAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEMBOURG	NEDERLAND	PORTUGAL	UNITED KINGDOM	EUR 12
BELGIQUE	1987	#	-	1512	-	14	-	-	-	-	90	-	9	1625
	1988	#	-	1550	-	15	-	-	-	-	180	-	-	1745
	1989	#	-	1520	-	15	-	-	-	-	180	-	-	1715
DANMARK	1987	-	#	4	1	-	-	-	-	-	8	-	1149	1162
	1988	-	#	-	-	-	-	-	-	-	-	-	545	545
	1989	-	#	-	-	-	-	-	-	-	-	-	200	200
DEUTSCHLAND	1987	102	-	#	-	392	-	-	-	-	49	-	196	739
	1988	100	-	#	-	500	-	-	-	-	10	-	190	800
	1989	100	-	#	-	400	-	-	-	-	-	-	150	650
ESPANA	1987	16	-	-	#	-	-	-	-	-	-	-	5	21
	1988	7	-	-	#	2	-	-	-	-	-	-	-	9
	1989	10	-	10	#	-	-	-	-	-	-	-	10	30
FRANCE	1987	102	-	1964	-	#	-	-	-	-	-	-	181	2247
	1988	230	-	1400	-	#	-	-	-	-	-	-	170	1800
	1989	150	-	1300	-	#	-	-	-	-	-	-	150	1600
HELLAS	1987	-	-	-	-	-	#	-	-	-	-	-	-	-
	1988	-	-	-	-	-	#	-	-	-	-	-	-	-
	1989	-	-	-	-	-	#	-	-	-	-	-	-	-
IRELAND	1987	16	-	-	-	65	-	#	-	-	80	-	350	511
	1988	15	-	31	-	59	-	#	-	-	75	-	173	353
	1989	16	-	34	-	64	-	#	-	-	66	-	181	361
ITALIA	1987	-	-	1493	-	-	-	-	#	-	-	-	-	1493
	1988	-	-	1100	-	13	-	-	#	-	-	-	-	1113
	1989	-	-	1000	-	-	-	-	#	-	-	-	-	1000
LUXEMBOURG	1987	5	-	6	-	-	-	-	-	#	6	-	-	17
	1988	25	-	6	-	-	-	-	-	#	3	-	-	34
	1989	24	-	5	-	-	-	-	-	#	3	-	-	32
NEDERLAND	1987	60	-	577	-	4	-	-	-	-	#	-	29	670
	1988	100	-	600	-	-	-	-	-	-	#	-	-	700
	1989	100	-	600	-	-	-	-	-	-	#	-	-	700
PORTUGAL	1987	-	-	-	-	15	-	-	-	-	-	#	225	240
	1988	-	-	-	3	1	-	-	-	-	2	#	164	170
	1989	-	-	-	3	1	-	-	-	-	2	#	44	50
UNITED KINGDOM	1987	190	1	255	-	35	-	15	-	-	664	-	#	1160
	1988	160	-	220	-	40	-	30	-	-	350	-	#	800
	1989	160	-	220	-	40	-	30	-	-	350	-	#	800
COMMUNITY	1987	491	1	5811	1	525	-	15	-	-	897	-	2144	9885
	1988	637	-	4907	3	630	-	30	-	-	620	-	1242	8069
	1989	560	-	4689	3	520	-	30	-	-	601	-	735	7138

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TABLE 20

TREND OF INTRA-COMMUNITY TRADE IN COKE
1987 - 1989

17-Feb-89

('000 TONNES)

		BELGI-QUE	DAN-MARK	DEUTS-CHLAND	ESPANA	FRANCE	HELLAS	IRE-LAND	ITALIA	LUXEM-BOURG	NEDER-LAND	POR-TUGAL	UNITED KINGDOM	EUR 1
BELGIQUE	1987	/	-	110	-	20	-	-	-	-	180	-	[illegible]	
	1988	/	-	260	-	15	-	-	-	-	165	-	10	[illegible]
	1989	/	-	260	-	15	-	-	-	-	165	-	10	[illegible]
DANMARK	1987	10	/	-	-	25	-	-	-	-	-	-	10	
	1988	20	/	-	-	20	-	-	-	-	-	-	-	[illegible]
	1989	20	/	-	-	20	-	-	-	-	-	-	-	[illegible]
DEUTSCHLAND	1987	230	-	/	10	90	-	-	-	-	120	-	30	[illegible]
	1988	250	-	/	-	100	-	-	-	-	30	-	20	[illegible]
	1989	250	-	/	-	100	-	-	-	-	30	-	20	40[illegible]
ESPANA	1987	15	-	5	/	30	-	-	-	-	-	-	10	[illegible]
	1988	-	-	10	/	28	-	-	18	-	-	3	16	[illegible]
	1989	-	-	10	/	10	-	-	15	-	-	-	15	[illegible]
FRANCE	1987	220	-	495	-	/	-	-	-	-	465	-	-	[illegible]
	1988	230	-	670	-	/	-	-	-	-	250	-	-	[illegible]
	1989	200	-	600	-	/	-	-	-	-	200	-	-	[illegible]
HELLAS	1987	-	-	-	-	5	/	-	5	-	-	-	-	[illegible]
	1988	-	-	-	-	5	/	-	20	-	-	-	-	[illegible]
	1989	-	-	-	-	-	/	-	-	-	-	-	-	
IRELAND	1987	-	-	-	-	-	-	/	-	-	-	-	4	4
	1988	-	-	-	-	-	-	/	-	-	-	-	4	6 *
	1989	-	-	-	-	-	-	/	-	-	-	-	4	6 *
ITALIA	1987	-	-	-	-	-	-	-	/	-	-	-	-	
	1988	-	-	-	-	-	-	-	/	-	-	-	-	-
	1989	-	-	-	-	-	-	-	/	-	-	-	-	-
LUXEMBOURG	1987	135	-	1160	-	-	-	-	-	/	-	-	-	1295
	1988	59	-	1328	-	-	-	-	-	/	-	-	-	1387
	1989	87	-	1284	-	-	-	-	-	/	-	-	-	1371
NEDERLAND	1987	-	80	-	-	-	-	-	-	-	/	-	70	150
	1988	35	90	-	-	20	-	-	-	-	/	-	55	200
	1989	35	90	-	-	20	-	-	-	-	/	-	55	200
PORTUGAL	1987	-	-	-	5	-	-	-	-	-	-	/	7	12
	1988	-	-	-	5	2	-	-	-	-	-	/	7	14
	1989	-	-	-	5	2	-	-	-	-	-	/	7	14
UNITED	1987	-	-	20	-	90	-	-	-	-	-	-	/	110
KINGDOM	1988	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	/	290
	1989	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	/	300
COMMUNITY	1987	610	80	1790	15	260	-	-	5	-	765	-	136	3661
(**)	1988	594	90	2268	5	190	-	-	38	-	445	3	112	4037 **
	1989	592	90	2154	5	167	-	-	15	-	395	-	111	3031 **

* Includes 2000 tonnes of unspecified community origine

** Except for the total, the breakdown of intra-Community trade excluoes the figures of the United Kingdom for 1988 and 1989

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TABLE 21

PRODUCERS' STOCKS OF HARD COAL AND COKE

(AT THE END OF THE YEAR)

17-Feb-89

('000 tonnes)

	1987	1988 Provisional		1989 Forecasts	
	Actual	1000 TONNES	Number of calendar days covered	1000 TONNES	Number of calendar days covered
A. HARD COAL					
Belgium	462	212	29	112	18
Germany (FR) (1)	11335	12355	57	11635	55
Spain	1859	1605 *	32	1500	30
France	3904	4000 *	118	NA	..
Ireland	20	20 *	152	20 *	112
Portugal	9	6 *	8	6 *	8
United Kingdom	6375	5634	21	6500	24
COMMUNITY	23964	23832	41	NA	..
B. COKE					
Belgium	64	80 *	6	64	5
Germany (FR) (1)	5727	4795	95	4250	87
Spain	165	180 *	23	130	17
France	514	424	21	NA	..
Greece	22	20 *	-	20	-
Italy	388	282	15	282	18
Netherlands	35	30 *	4	NA	..
Portugal	19	12 *	16	NA	..
United Kingdom	633	453	20	NA	..
COMMUNITY	7567	6276	44	NA	..

* Estimations of the Commission of the European Communities

(1) Excluding the national reserve

TABLE 22

HARD COAL BALANCE SHEET FOR 1989

17-Feb-89

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
1. PRODUCTION (t=t)	2255	0	76600	18200	11470	0	65	0	0	0	270	100000	208860
2. RECOVERIES	1025	0	400	200	650	0	0	0	0	0		3000	5275
3. ARRIVALS FROM ECSC COUNTRIES	1715	200	650	30	1600	0	361	1000	32	700	50	800	(7138)
4. IMPORTS FROM THIRD COUNTRIES	8970	12100	6100	8620	10200	1800	2794	18864	134	13650	3094	12200	98526
5. AVAILABILITIES (1+2+3+4)	13965	12300	83750	27050	23920	1800	3220	19864	166	14350	3414	116000	312661
6. INTERNAL DELIVERIES													
A. COLLIERY POWER STATIONS	280	0	1600	0	4200	0	0	0	0	0	0	0	6080
B. PUBLIC POWER STATIONS	4375	11300	41000	19400	2800	-	1777	10500	0	7500	2260	85000	185912
C. COKE OVENS	6800	0	23400	3700	9350	-	0	7964	0	4000	374	11000	66588
D. STEEL INDUSTRY	250	0	2100	200	1040	100	0	0	45	450	0	230 *	4415
(OF WHICH POWER STATIONS)	(-)	(-)	(100)	(-)	(40)	(-)	(-)	(-)	(-)	(-)	(-)	NA	(140)
E. OTHER INDUSTRIES	830	500	8000	2500	3800	1400	386	1400	120	400	780	8770 *	28886
(OF WHICH POWER STATIONS)	(-)	(-)	(5200)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	NA	(5200)
F. DOMESTIC SECTOR	905	400	600	1000	1700	-	871	-	1	-	-	5000	10477
G. MISCELLANEOUS (TOTAL) OF	25	100	2200	250	980	-	-	-	-	210	2	4500	8267
WHICH : 1. ISSUES TO WORKERS	(10)	(-)	(90)	(200)	(30)	(-)	(-)	(-)	(-)	(-)	(-)	(1000)	(1330)
2. PATENT FUEL	(10)	(-)	(700)	(-)	(750)	(-)	(-)	(-)	(-)	(-)	(-)	(2000)	(3460)
3. OWN CONSUMPTION	(5)	(-)	(100)	(50)	(150)	(-)	(-)	(-)	(-)	(-)	(-)	(200)	(505)
4. GASWORKS	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)
5. RAILWAYS	(-)	(-)	(110)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(110)
6. OTHERS	(-)	(100)	(1200)	(-)	(50)	(-)	(-)	(-)	(-)	(210)	(2)	(1300)	(2852)
7. TOTAL INTERNAL DELIVERIES (6)	13465	12300	78900	27050	23870	1500	3034	19864	166	12560	3416	114500	310625
8. DELIVERIES TO ECSC	535	0	5000	0	600 *	0	51	0	0	1480	0	450 *	(8116)
9. EXPORTS TO NON MEMBER COUNTRIES	65	0	400	0	250 *	300	1	0	0	310	0	50 *	1376
10. TOTAL DELIVERIES (7+8+9)	14065	12300	84300	27050	24720	1800	3086	19864	166	14350	3416	115000	312001
11. MOVEMENTS OF PRODUCERS' AND IMPORTERS' STOCKS (5-10)	-100	0	-550**	-	-800	-	134	-	-	-	-2	1000	660

* Commission Forecasts

n.a. not available

** Including repurchases of 200.000 tonnes from the Nationale Kohlereserve

TABLE 23

HARD COAL BALANCE SHEET FOR 1988

17-Feb-89

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
1. PRODUCTION (t=t)	2645	0	79050	18400	12400	-	48	-	-	-	270	100000	212813
2. RECOVERIES	900	0	550	250	650	-	-	-	-	-	-	3000	5350
3. ARRIVALS FROM ECSC COUNTRIES	1745	545	800	9	1800	-	353	1113	34	700	170	800	(8069)
4. IMPORTS FROM THIRD COUNTIES	9200	9381	6800	8400	10450	1800	2763	20912	131	13150	2864	12200	98051
5. AVAILABILITIES (1+2+3+4)	14490	9926	87200	27059	25300	1800	3164	22025	165	13850	3304	116000	316214
6. INTERNAL DELIVERIES													
A. COLLIERY POWER STATIONS	250	0	1800	-	4800	-	-	-	-	-	-	-	6850
B. PUBLIC POWER STATIONS	4725	8900	42000	19600	2400	50	1652	10300	-	7000	2150	85000	183777
C. COKE OVENS	7000	0	24000	3800	9500	-	-	9598	-	4000	374	11000	69272
D. STEEL INDUSTRY	250	0	1800	200	1040	80	-	400	44	450	-	200 *	4464
(OF WHICH POWER STATIONS)	(-)	(-)	(152)	(-)	(40)	(-)	(-)	(-)	(-)	(-)	(-)	(NA)	(190)
E. OTHER INDUSTRIES	850	500	8200	2500	4200	1370	399	1698	120	400	776	8300 *	29313
(OF WHICH POWER STATIONS)	(-)	(-)	(5300)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(NA)	(5300)
F. DOMESTIC SECTOR	900	400	700	1000	1800	-	1037	53	1	-	-	6000	11891
G. MISCELLANEOUS (TOTAL) OF	25	100	2500	259	1160	-	-	-	-	210	2	4500	8756
WHICH : 1. ISSUES TO WORKERS	(10)	(-)	(100)	(200)	(60)	(-)	(-)	(-)	(-)	(-)	(-)	(1000)	(1370)
2. PATENT FUEL	(10)	(-)	(810)	(-)	(820)	(-)	(-)	(-)	(-)	(-)	(-)	(2000)	(3640)
3. OWN CONSUMPTION	(5)	(-)	(140)	(59)	(200)	(-)	(-)	(-)	(-)	(-)	(-)	(200)	(604)
4. GASWORKS	(-)	(-)	(70)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(70)
5. RAILWAYS	(-)	(-)	(130)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(130)
6. OTHERS	(-)	(100)	(1250)	(-)	(80)	(-)	(-)	(-)	(-)	(210)	(2)	(1300)	(2942)
7. TOTAL INTERNAL DELIVERIES (6)	14000	9900	81000	27359	24900	1500	3088	22049	165	12060	3302	115000	314323
8. DELIVERIES TO ECSC	685	0	4700	-	750 *	-	50	-	-	1480	-	1200 *	(8865)
9. EXPORTS TO NON MEMBER COUNTRIES	55	0	400	-	750 *	300	1	-	-	310	-	400 *	2216
10. TOTAL DELIVERIES (7+8+9)	14740	9900	86100	27359	26400	1800	3139	22049	165	13850	3302	116600	316539
11. MOVEMENTS OF PRODUCERS' AND IMPORTERS' STOCKS (5-10)	-250	26	+1100	-300	-1100	-	+25	-24	-	-	+2	-600	-325

* Commission Forecasts

n.a. not available

TABLE 24
COKE BALANCE SHEET 1989

17-Feb-89 ('000 T)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM*	EUR - 12
1. PRODUCTION	5150	0	17900	2800	7100	-	-	5835	-	2900	290	8200	50175
2. RECEIPTS FROM ECSC COUNTRIES	450	40	400	50	1000	-	6	-	1371	200	14	300	(3831)
3. IMPORTS FROM THIRD COUNTRIES	250	10	200	110	200	50	-	-	53	150	-	-	1023
4. AVAILABILITIES (1+2+3)	5850	50	18500	2960	8300	50	6	5835	1424	3250	304	8500	51198
5. INLAND DELIVERIES													
A. STEEL INDUSTRY	5000	0	15300	2750	7000	35	-	5430	1424	2100	260	6400	45599
B. OTHER INDUSTRIES	130	25	800	352	650	15	6	290	-	150	-	150	2578
C. DOMESTIC SECTOR	12	25	300	-	180	0	0	115	-	-	-	1500	2132
D. MISCELLANEOUS OF WHICH	8	0	650	-	150	-	-	-	-	50	24	50	932
- ISSUES TO WORKERS	(8)	(-)	(380)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(388)
- OWN CONSUMPTION	(-)	(-)	(10)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(10)
- OTHERS	(-)	(-)	(260)	(-)	(150)	(-)	(-)	(-)	(-)	(50)	(24)	(50)	(534)
6. TOTAL INLAND DELIVERIES (5)	5150	50	17050	3112	7980	50	6	5835	1424	2300	284	8100	51341
7. DELIVERIES TO ECSC COUNTRIES	635	0	2000	-	250 *	-	-	-	-	850	-	350	(4085)
8. EXPORTS TO THIRD COUNTRIES	65	0	1200	-	150 *	-	-	-	-	100	-	50	1565
9. TOTAL DELIVERIES (6+7+8)	5850	50	20250	3112	8380	50	6	5835	1424	3250	284	8500	52906
10. STOCK MOVEMENT AT PRODUCTION AND IMPORT (4-9)	-	0	-1750**	-152	-80	-	-	-	-	-	20	-	-1708

* Commission Forecasts

** Including repurchases of 1,800,000 tonnes from the National Kohlereserve

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TABLEAU 25

COKE BALANCE SHEET 1988

17-Feb-89

('000 T)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM*	EUR - 12
1. PRODUCTION	5550	0	18400	2950	7400	-	-	6400 *	-	2900	270	7850	51730
2. RECEIPTS FROM ECSC COUNTRIES	450	40	400	75	1150	25	6	-	1387	200	14	290	(4037)
3. IMPORTS FROM THIRD COUNTRIES	250	10	250	125	300	25	-	-	39	150	-	10	1159
4. AVAILABILITIES (1+2+3)	6250	50	19050	3150	8850	50	6	6400	1426	3250	284	8160	52889
5. INLAND DELIVERIES													
A. STEEL INDUSTRY	5200	0	15700	3000	7000	35	-	6257	1200 *	2200	260	6100	46952
B. OTHER INDUSTRIES	130	25	850	362	700	15	6	330	-	150	-	150	2718
C. DOMESTIC SECTOR	12	25	350	-	200	-	-	141	-	-	-	1500	2228
D. MISCELLANEOUS OF WHICH	8	0	680	-	200	-	-	-	-	50	24	50	1012
- ISSUES TO WORKERS	(8)	(-)	(400)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(408)
- OWN CONSUMPTION	(-)	(-)	(10)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(10)
- OTHERS	(-)	(-)	(270)	(-)	(200)	(-)	(-)	(-)	(-)	(50)	(24)	(50)	(594)
6. TOTAL INLAND DELIVERIES (5)	5350	50	17580	3362	8100	50	6	6728	1200	2400	284	7800	52910
7. DELIVERIES TO ECSC COUNTRIES	660	0	2400	-	325 *	-	-	24	-	850	-	350	(4609)
8. EXPORTS TO THIRD COUNTRIES	65	0	550	-	175 *	-	-	308	-	100	-	50	1248
9. TOTAL DELIVERIES (6+7+8)	6075	50	20530	3362	8600	50	6	7060	1200	3350	284	8200	54158
10. STOCK MOVEMENT AT PRODUCTION AND IMPORT (4-9)	+175	0	-1480**	-212	+250	-	-	-660	+226	-100	-	-40	-1269

* Commission Forecasts

** Including repurchases of 850,000 tonnes from the National Kohlereserve

TABLE 26

LIGNITE AND PEAT BALANCE SHEET FOR 1989

17-Feb-89

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
A. RAW PRODUCT													
- AVAILABILITIES :													
PRODUCTION	-	0	108000	13200	2100	56000	6798	1600	-	-	-	-	187698
IMPORTS	-	0	2000	-	50	-	43	-	-	-	-	-	2093
TOTAL :	-	0	110000	13200	2150	56000	6841	1600	-	-	-	-	189791
- UTILIZATION :													
BRIQUETTING PLANTS	-	0	15500	-	-	500	1312	-	-	-	-	-	17312
POWER STATIONS	-	0	93000	13200	1800	53500	3570	1600	-	-	-	-	166670
OTHERS	-	0	1500	-	210	1000	1274	-	-	-	-	-	3984
B. BRIQUETTES													
- AVAILABILITIES :													
PRODUCTION	-	0	4880	-	-	120	-	-	-	-	-	-	5000
ARRIVAL FROM ECSC COUNTRIES	280	0	-	-	70	-	-	-	28	-	-	-	378
IMPORTS FROM NON-MEMBER COUNTRIES	20	15	1200	60	10	-	-	-	-	-	-	-	1305
TOTAL :	300	15	6080	60	80	120	-	-	28	-	-	-	6683
- UTILIZATION :													
POWER STATIONS	-	0	700	60	-	-	-	-	-	-	-	-	760
INDUSTRY	250	0	2680	-	-	60	-	-	10	-	-	-	3000
DOMESTIC	50	15	1800	-	80	60	-	-	18	-	-	-	2023
SHIPMENTS TO OTHER ECSC COUNTRIES	-	0	700	-	-	-	-	-	-	-	-	-	700
EXPORTS TO NON-MEMBER COUNTRIES	-	0	200	-	-	-	-	-	-	-	-	-	200

TABLE 27

LIGNITE AND PEAT BALANCE SHEET FOR 1988

17-Feb-89

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
A. RAW PRODUCT													
- AVAILABILITIES :													
PRODUCTION	-	-	107500	11000	1700	50000	4596	1600	-	-	-	-	176396
IMPORTS	-	-	1900	-	50	-	42	48	-	-	-	-	2040
TOTAL :	-	-	109400	11000	1750	50000	4638	1648	-	-	-	-	178436
- UTILIZATION :													
BRIQUETTING PLANTS	-	-	15000	-	-	500	1250	-	-	-	-	-	16750
POWER STATIONS	-	-	92700	11000	1600	47000	3570	1652	-	-	-	-	157522
OTHERS	-	-	1700	-	180	1300	1327	-	-	-	-	-	4507
B. BRIQUETTES													
- AVAILABILITIES :													
PRODUCTION	-	-	4620	-	-	120	-	-	-	-	-	-	4740
ARRIVAL FROM ECSC COUNTRIES	280	-	-	-	70	-	-	100	24	-	-	-	474
IMPORTS FROM NON-MEMBER COUNTRIES	20	15	1200	60	10	-	-	-	-	-	-	-	1305
TOTAL :	300	15	5820	60	80	120	0	100	24	0	0	0	6519
- UTILIZATION :													
POWER STATIONS	-	-	650	60	-	-	-	100	-	-	-	-	810
INDUSTRY	250	-	2510	-	-	60	-	-	6	-	-	-	2826
DOMESTIC	50	15	1820	-	80	60	-	-	18	-	-	-	2043
SHIPMENTS TO OTHER ECSC COUNTRIES	-	-	640	-	-	-	-	-	-	-	-	-	640
EXPORTS TO NON-MEMBER COUNTRIES	-	-	200	-	-	-	-	-	-	-	-	-	200