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COMMISSION REPORT

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

* Revision of Commission report SEC(94)448 final of 22.03.1994.

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THE MARKET FOR SOLID FUELS IN THE COMMUNITY IN 1993 AND THE OUTLOOK FOR 1994 (revision)

1. INTRODUCTION

This report summarises the situation of the Community solid fuel market in 1993 and gives the Member States' forecasts for 1994 from information forwarded to the Commission in June 1994.

Its purpose is to inform the ECSC Consultative Committee and those concerned about developments in the market for solid fuels in the Community as early as possible.

The report thus updates the information contained in the Commission's annual report on "The market for solid fuels in the Community in 1993 and the outlook for 1994"⁽¹⁾, which gave the forecasts made at the end of 1993 and in January 1994. At the end of the current year, a preliminary report will be drawn up with the provisional results for 1994 and the outlook for 1995.

2. ECONOMIC SITUATION⁽²⁾

Revised economic forecasts mark a perceptible move towards a more sanguine assessment of short-term economic prospects in the Community. With recessionary forces dissipating and positive factors gradually becoming predominant, the focal point of the forecasts is the likely speed of the upswing over the short to medium term.

For 1994, an increasing number of signs indicate that the trough of the cyclical downturn was reached in the spring of last year. Since then a moderate recovery has been underway. It was not sufficient to prevent a year-on-year decline in GDP of around ¼ per cent during 1993. Evidence emerging in the first few months of this year not only suggest that the pace of the upswing is likely to gather momentum over the coming quarters, but also that the foundations are being built for a robust growth in the near future.

(1) SEC(94) 448 final of 22.03.1994.

(2) Economic forecasts 1994. Spring 1994. EC.

Growing optimism regarding the Community's economic prospects derives mainly from the following factors:

- The favourable international environment. The successful conclusion of the Uruguay Round and the much improved performance of the US economy point to a more favourable international economic environment for Community exporters.
- A further easing of the monetary situation in the Community given the good progress on the inflation front.
- A gradual regaining of business and consumer confidence.
- Expectations of a benign behaviour with regards to savings.

Community GDP is now expected to expand by more than 1½ per cent in real terms in 1994. Conditions in the Community labour market will remain negative this year, but the pace of the deterioration will slow down considerably. Employment is likely to decline further in 1994, but only by ¾ per cent compared to the cumulative drop of 3% over the last two years.

Further progress against inflation is expected this year. In addition, the Community's budget deficit could improve this year to some 5.5% of the GDP, compared to 6% during 1993.

The table below shows the main features of the Commission services' "Spring 1994 Forecasts", together with some indications of the size of the revisions.

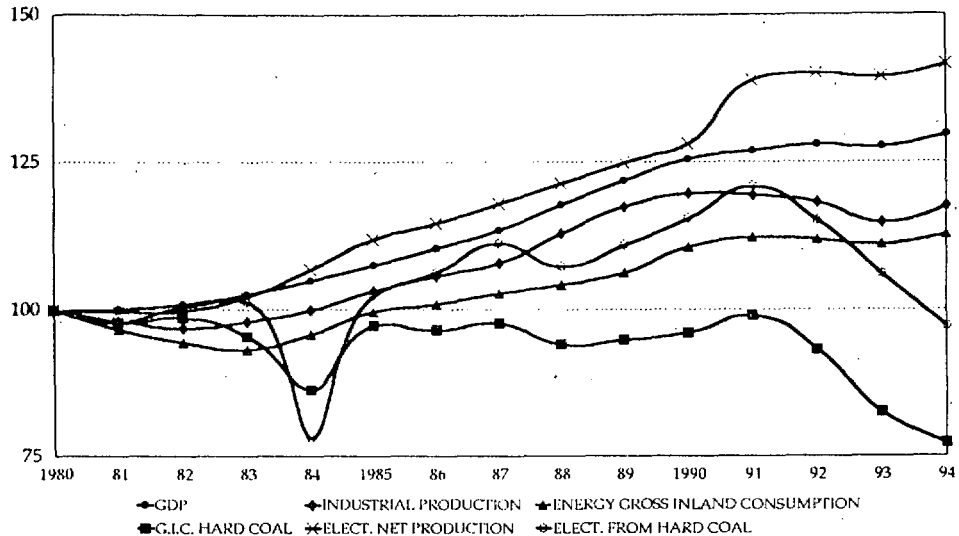
MAIN FEATURES OF THE ECONOMIC FORECASTS - EU			
	1993 estimates	forecasts for 1994	
		Previous (Nov 1993)	Latest (June 1994)
GDP growth ^{a)}	-0.3	1.3	1.6
Total investment ^{a)}	-5.0	2.0	1.6
Employment ^{a)}	-1.9	-0.5	-0.7
Unemployment rate	10.9	11.2	11.6
Inflation ^{b)}	3.9	3.5	3.3
Budget deficit ^{c)}	-6.0	-6.1	-5.6

a) Real % change per annum.

b) Deflator of private consumption; % change per annum.

c) General government, as % of GDP.

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



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

3. COMMUNITY ENERGY MARKET.

According to the data available, total primary energy demand (in terms of gross inland consumption) in the Community during 1993 decreased by 0.7% compared to 1992, which was itself a decrease of 0.3% compared to the previous year.

When examining the different energy sources, it emerges that only oil and solid fuels saw a decrease in demand, whilst natural gas, nuclear and renewable in fact saw significant increases.

Hard coal demand decreased by some 10% and lignite dropped by more than 7%. Altogether, solid fuels accounted for a fall of 9.6%. Oil also decreased by 1.1% due to lower demand from industry. On the other hand, nuclear rose by almost 5% and natural gas increased by 5.7%.

GROSS INLAND CONSUMPTION - EU - (million toe)					
	1993	1994	1994/1993 (%)	share in 1993 (%)	share in 1994 (%)
Hard coal	172.3	166.5	-3.4	14.4	13.7
Lignite	59.3	58.6	-1.2	4.9	4.8
TOTAL SOLID FUELS	231.6	225.2	-2.8	19.3	18.6
OIL	529.0	529.5	0.1	44.1	43.7
NATURAL GAS	242.8	257.1	5.9	20.2	21.2
NUCLEAR	174.7	178.1	1.9	14.6	14.7
OTHERS	21.4	22.6	5.6	1.8	1.9
TOTAL	1199.6	1212.6	1.1	100	100

The weak performance of the economy is the main factor explaining this behaviour in demand during 1993, as no other factors had any influence. Weather conditions remained almost identical to the previous year, although they were, however, slightly warmer than the historical average

For 1994, the expected growth in GDP of the order of 1.6% could result in a rise of some 1.1% in total energy demand, assuming normal weather conditions.

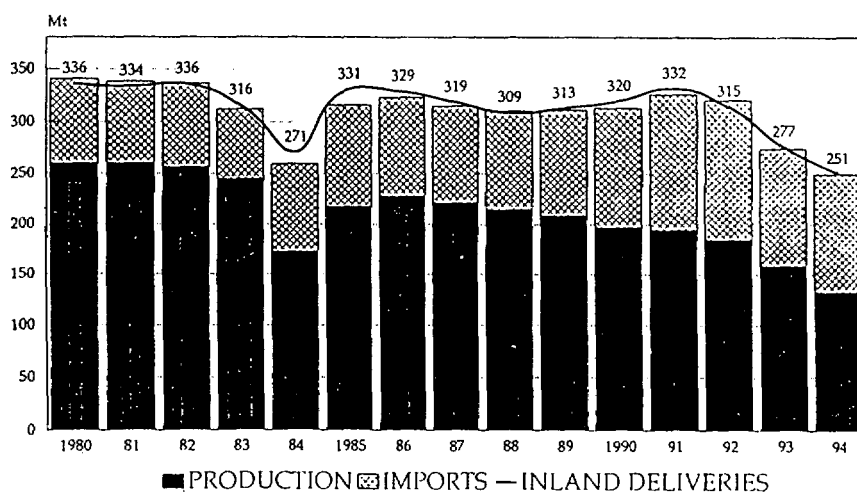
Lignite and hard coal are likely to be the only energy sources to see a fall in demand during 1994, as the other energy sources could see significant rises, in particular natural gas. Solids fuels are continuing to show a steady loss of their share of total energy demand, down from 24% in 1990 to less than 19% in 1994.

4. HARD COAL MARKET.

The revised forecasts for hard coal during 1994 point to a further reduction to a new low for the Community. Deliveries for 1994 are expected to be the lowest ever seen in the Community. Total deliveries are forecast at 255.8 Mt, which is 17.0 Mt or 6.2% lower than the 1993 figure.

On the supply side, Community production is expected to decrease by 25.8 Mt (-16.3%) to 132.8 Mt. On the other hand, hard coal imported from third countries could remain steady or slightly increase by 0.9 Mt to 116.9 Mt. Taken altogether, and including recoveries, the forecasts point to the total resources available being 251.2 Mt, compared to 277.1 Mt in 1993 and some 331.6 Mt just three years ago (1991).

TREND IN PRODUCTION AND IMPORTS OF
HARD COAL



* INCLUDING NEW GERMAN LÄNDER FROM 1991

On the demand side, the most noticeable fact is that the fall is generalised across all the consumer sectors, although it is especially notable in the electricity generating industry.

Total production and imports are estimated to be more than 5 Mt lower than the anticipated demand. This should lead to a reduction in the level of the stocks held both by the producers and the importers.

The coke market continues to decline, as it did in the previous year, even though a fair growth in the production of crude steel is expected for this year. This trend in the demand for coke can be explained by the technological changes being introduced into the blast furnaces (pulverised coal injection) and by the increasing use of electrical furnaces.

The lignite market is also likely to decline slightly, mainly as a result of the lower demand from the briquetting plants.

COMPARISON OF THE MAIN FEATURES OF THE SOLID FUEL MARKET

(million tonnes)

	1993 previous	1993 latest	1994 previous	1994 latest	1994 latest/ previous(%)	1994/93 (%)
HARD COAL						
Resources						
- Production	160.1	158.6	138.9	132.8	-4.4	-16.3
- Recoveries	2.6	2.5	2.2	1.5	-31.2	-40.4
- Imports from third countries	117.0	115.8	114.9	116.9	1.7	0.8
Total	279.8	277.1	256.0	251.2	-1.9	-9.3
Deliveries						
- To coking plants	53.1	52.5	50.8	51.1	0.6	-2.5
- To power stations*	181.0	182.5	168.0	167.3	-0.4	-8.3
- To others	41.5	37.9	40.8	37.4	-8.5	-1.4
- Exports to third countries	0.3	0.4	0.3	0.3	14.6	-19.9
Total	275.9	273.2	259.9	256.1	-1.5	-6.3
COKE						
Resources						
- Production	39.7	39.4	38.1	38.7	1.5	-2.2
- Imports from third countries	2.0	3.1	2.0	3.4	73.1	9.8
Total	41.8	42.5	40.1	42.1	5.0	-1.1
Deliveries						
- To steel industry	36.3	37.1	35.2	36.9	4.6	-0.8
- Other deliveries within the Community	5.1	4.8	4.9	4.2	-12.7	-10.8
- Exports to third countries	0.6	0.7	0.6	0.9	52.1	20.5
Total	42.1	42.6	40.7	42.0	3.2	-1.5
LIGNITE AND PEAT						
Resources						
- Production and imports	305.2	301.5	303.0	293.2	-3.2	-2.8
Deliveries						
- To briquetting plants	46.2	47.7	45.5	40.7	-10.6	-14.8
- To power stations	235.4	233.8	237.3	233.5	-1.6	-0.1
- Others (including exports to third countries)	23.5	20.0	20.2	19.0	-5.7	-5.0
Total	305.1	301.5	303.0	293.2	-3.2	-2.8

(!) The sums may not add up due to rounding.

* Including industrial and pithead power stations

4.1. Hard coal production.

According to the latest information available, hard coal production in the Community amounted to 158.6 Mt in 1993, which is down by 26.0 Mt compared to 1992.

COMPARISON OF THE HARD COAL PRODUCTION FOR THE MAIN PRODUCER COUNTRIES (Mt)						
Member State	1992	Results in 1993		Forecasts for 1994		1994/93 (%)
		previous		previous	latest	
United Kingdom	83.9	68.0	67.5	55	49.0	-27.4
Germany	72.2	64.2	64.2	57	57.8	-10.0
Spain	18.6	18.9	18.2	18.5	17.7	-2.7
France	9.5	8.8	8.6	8.2	8.2	-4.4
Belgium	0.2	--	--	--	--	--
Portugal	0.2	0.2	0.2	0.2	0.2	-23.9
Others	0.0	0.0	0.0	0.0	0.0	-47.6
Total	184.6	160.1	158.6	138.9	132.8	-16.3

For 1994, current forecasts indicate a marked drop in production of some 25.8 Mt (-16.3 %) to 132.8 Mt. The most significant decreases are expected to be in the United Kingdom, with a decrease of some 18.5 Mt (-27.4%) as a result of the lower demand for hard coal from the power stations, and Germany, with a forecast drop of some 6.4 Mt (-10.0%).

In the United Kingdom, production is expected to continue to fall. This is primarily a result of the contraction in the home market for coal in the power generation sector as the electricity producers switch to alternative fuels, mainly gas and nuclear power.

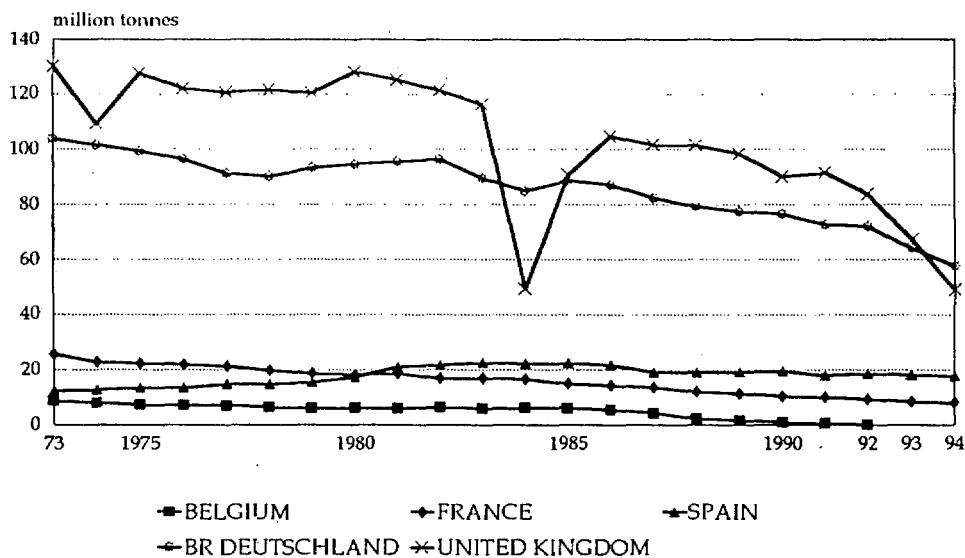
British Coal has had to adjust to this changing situation. Its number of deep mines has fallen from 22 at the end of 1993 to 16 operational currently and two development mines. As a result of this cutback, British Coal is not expected to add to its own coal stocks in 1994.

The Government has also offered a subsidy, available to any deep mine operator, for extra sales to the power generating industry at world market related prices. The aim of the subsidy is to give those pits which are currently facing difficulties time in which to achieve the improvements and cost reductions necessary in order to become competitive. The subsidy is only available up to the privatisation of British Coal, which is expected to be completed by the start of 1995 now that the necessary legislation has completed its passage through Parliament. The mining assets of British Coal will be sold to the private sector and a "Coal Authority" will be created, with responsibility for issuing the licences for mining operations.

In Germany, production will continue to fall in the future although, according to the existing plans, the decreases should be at a much smoother pace than has been the case in 1993 and so far in 1994.

The German parliament has recently agreed on the coexistence of fossil fuels, renewable sources of energy and nuclear power. Whilst domestic hard coal should receive further subsidies, this will not be achieved by guaranteeing annual tonnages but by the mechanism of a fixed financial ceiling. The subsidies foreseen amount to DM 7.5 billion for 1996 and DM 7 billion for each of the years 1997 to 2000. The financing will initially still be carried out through the so-called "coal penny" mechanism but it is intended that a new financing system starting from 1997 will have to be enacted. At the time of writing, the Commission has not yet taken a position on this strategy in the light of the provisions of Commission Decision 3632/93/ECSC.

HARD COAL PRODUCTION



For 1994, given that the anticipated drop in production is significantly more marked than the expected fall in demand, and bearing in mind that imports will probably not see any significant variation compared to the previous year, total Community stocks at the collieries should decrease by some 9 Mt.

4.2. Deliveries of hard coal.

In 1993, internal hard coal deliveries in the Community totalled 272.8 Mt, which is some 41.6 Mt less (-13.2%) than the previous year. This decrease was due to the lower demand from all the consumer sectors, although most marked were the reductions of 29.9 Mt (-14.9%) in deliveries to the electricity generating industry and the drop of 7.6 Mt (-12.6%) in deliveries to the cokeries. The decreases in industry in general and domestic heating were less significant.

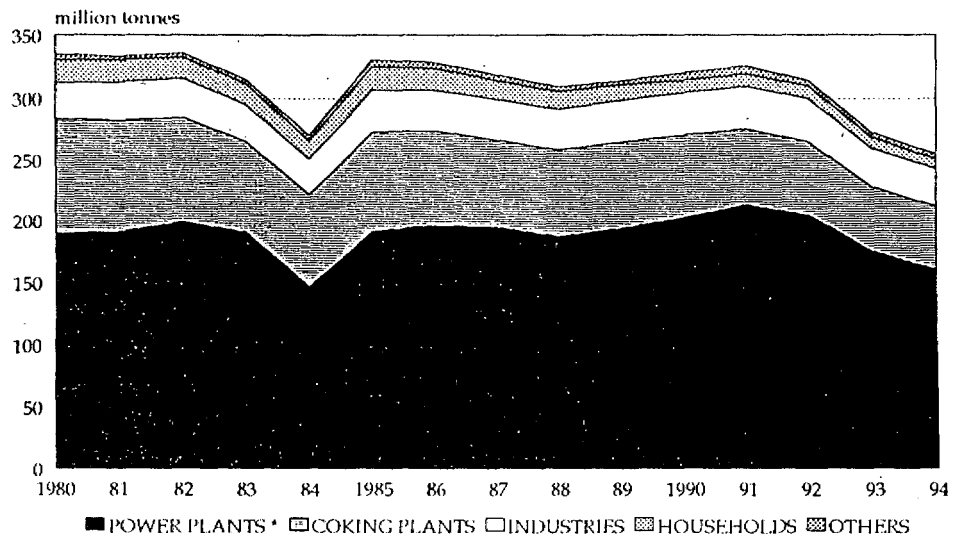
The pronounced drop in deliveries to the public power stations was even more noticeable given the fact that deliveries to this sector had already fallen significantly during 1992 compared to 1991.

Deliveries to the other sectors showed the usual downward trend that has been exhibited in the past. Notable however is the decline in deliveries to "other industries", which is not only the result of the weak performance of the economy and hence of the industrial sector, but is also due to the low prices of the alternative fuels such as petroleum products and petcoke.

With respect to coal delivered for public electricity generation, the most significant decreases have been in the United Kingdom, followed by France, Germany and Italy. Total stocks at the power plants decreased by 7.4 Mt during 1993 to attain 68.4 Mt, which implies that the actual consumption of hard coal by the electricity generating sector during 1993 was some 21.5 Mt less than in the previous year. The reasons for these decreases are the following:

- in the United Kingdom, there was an increase in production from nuclear power stations and from natural gas-fired plants. For example, the additional natural gas input to power plants is the equivalent to some 10 Mt of hard coal, whilst the higher production from nuclear plants represents an equivalent displacement of almost 5 Mt of hard coal.
- in France, the increasing production from nuclear plants led to lower demand for electricity from the coal-fired power stations. The total increase in nuclear-generated electricity displaced the equivalent of some 10 Mt of hard coal.
- in Germany there was a decrease in the demand for electricity together with an increase in electricity imports.
- in Italy, the decrease in electricity demand and the increasing penetration of natural gas, combined with a higher level of imported electricity, led to a lower demand for hard coal from the power stations.

INLAND DELIVERIES OF HARD COAL



* Public and pithead power stations

** Including new German Länder from 1992

For 1994, total internal hard coal deliveries are expected to decrease again by 17.0 Mt (-6.2%) to reach 255.8 Mt. This tonnage would be the lowest ever seen in the Community.

By sector, the forecasts are for a generalised decrease with the sole exception being deliveries of "thermal coal" to the steel industry for PCI (pulverised coal injection) purposes. The most significant falls are forecast for public electricity generation, with a decrease of some 14.5 Mt (-8.4%) to 156.6 Mt, and in deliveries to the cokeries, with a 1.3 Mt drop (-2.5%) to 51.1 Mt.

The decline in deliveries to the public electricity generating sector is responsible for 85% of the expected decrease in 1994 compared to 1993.

By country, the decrease is expected to be particularly marked in the United Kingdom, with a decline of some 18.2 Mt (-21.8%), followed by Germany with 0.9 Mt (-1.2%), France with 0.9 Mt (-4.3%) and Spain with 0.8 Mt (-2.4%). On the other hand, Belgium and the Netherlands are expected to increase their deliveries by 1.3 and 1.2 Mt respectively. Other variations are much less significant in absolute terms.

DELIVERIES OF HARD COAL TO THE MAIN CONSUMER SECTORS (Mt)			
Sector	1993	1994	1994/93 (%)
- Public power stations	171.1	156.6	-8.4
- Colliery power stations	4.5	4.2	-5.8
- Coke ovens	52.5	51.1	-2.5
- Steel industry*	7.4	7.8	6.2
- Other industries*	24.6	23.9	-2.7
- Domestic sector and issues to workers	9.2	8.4	-8.9
- Others **	3.7	3.7	0.9
Total inland deliveries	272.8	255.8	-6.2

* including the own generating power requirements;

** others and statistical differences

It is important to note that the main decreases are expected to occur in the major Community hard coal producing countries although, if the United Kingdom is excluded, the trend for 1994 would probably be for a slight increase of 1.2 Mt.

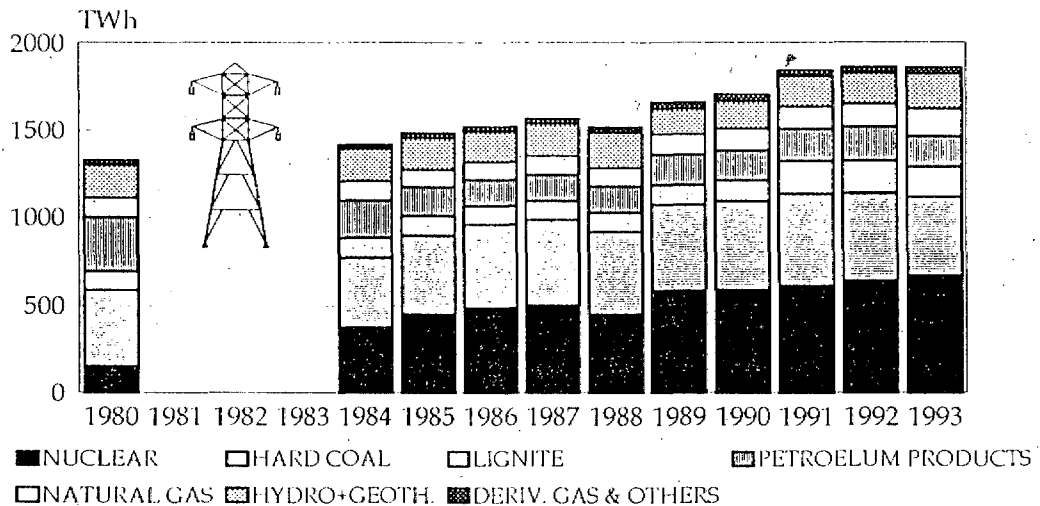
With respect to the deliveries of coal to the public power stations, the main decrease, of some 17.5 Mt (-29.0%), is expected in the United Kingdom. The other principle drop, of 1.1 Mt (-4.5%), is expected in Spain. On the other hand, the Netherlands is expected to increase its deliveries by 1.9 Mt, and Belgium and Denmark by 0.8 Mt each. Other variations are of a minor importance in absolute terms.

The decline in deliveries to this sector is essentially the result of the dramatic changes that have occurred in the United Kingdom, given that the trend for 1994 would have been for an increase of 3 Mt if the figures for the United Kingdom for 1994 had not differed from those of 1993.

The current contracts between British Coal and the two power generators - National Power and PowerGen - fixed tonnages at 40 Mt during the 1993/94 financial year and at 30 Mt for each of the following four years.

Given that the most spectacular change in demand for hard coal over the last two years has been the decrease in deliveries to the power stations, it is useful to examine the evolution of the electricity generating sector since 1980 and the anticipated demand for the rest of this decade.

ELECTRICITY GENERATION



* Including new German Länder from 1991

The power generation sector has been, and will continue to be, the driving force of the demand for solid fuels. This influence is likely to be reinforced in the future as industry and the domestic and tertiary sectors continue to move away from the use of coal, principally due to the inconvenience of its use and the competitive prices of alternative fuels.

From 1980 until 1991, and even in 1992, annual deliveries to the public power plants had been slowly increasing (with the main exception being 1984, due to the effects of the miners' strike in the United Kingdom). Although electricity produced from hard coal increased slightly, in absolute terms, its contribution to total electricity generation, in relative terms, was gradually declining. Over the same period, nuclear production tripled and the generation from petroleum products almost halved. The use of natural gas only began to increase rapidly at the start of the 1990's

For the future, the projected capacities for electricity generation, by type of fuel, can provide an indication of the trends in fuel demand up to the year 2000.

According to the electricity generating industry, total net generating capacity in the European Union was 455 GW at the end of 1993 and could reach some 532 GW by the year 2000. The breakdown by source of energy is as follows:

	1993		2000	
	GW	%	GW	%
NUCLEAR	105	23.1	113	21.3
CONVENTIONAL THERMAL	261	57.4	322	60.5
of which:				
MONOVALENT				
Coal	63	13.8	69	13.0
Lignite	32	7.0	29	5.4
Oil	49	10.7	40	7.5
Natural gas	29	6.3	88	16.5
POLYVALENT				
Coal	73	16.0	78	14.7
Others	16	3.6	18	3.4
HYDRO	83	18.3	88	16.5
OTHERS	5	1.2	9	1.7

Between 1993 and 2000, the largest variation in capacity is expected to be for conventional thermal stations and, in particular, for combined cycled gas-fired plants.

In terms of hard coal equivalent, assuming a load factor for these new plants of 65%, this would mean that hard coal consumption in power plants could increase by about 13 Mtce with respect to the potential level of consumption today, whilst demand for natural gas could rise by the equivalent of more than 115 Mtce. However, due to their age, a certain number of the coal-fired plants contained in the table above will be closed down during this decade and therefore any significant increase in the net demand for hard coal is more likely to come from an increase in the load factor of these plants than from any appreciable increase in the net number of coal-fired installations.

By the end of 1992, some 35 GW of generating capacity was under construction, of which 34% was designed to use natural gas, 25% nuclear, more than 15% was thermal polyvalent and 7% hydro. For the period 1992-1995 some 42 GW may be authorised, of which almost 14% would be nuclear-based, 54% thermal monovalent (of which some 80% would use natural gas), 10% thermal polyvalent and 6.5% hydro. Four countries are expected to account for the three quarters of these new capacities: the United Kingdom (31%), Italy (21%), France (11%) and Germany (10%).

When using CCGT technology, there are clear advantages in using natural gas rather than hard coal for power generation. These include a lower capital investment intensity, lower emissions and higher energy efficiency. The main disadvantages are that the natural gas market is more of a regional market than a world market, with a lower diversity of suppliers, and natural gas prices are, to a large extent, coupled or linked to oil quotations on the international market; a market which is more volatile than the international steam coal market.

Most of the hopes for the future use of hard coal in power generation are based on IGCC (Integrated Gasification Combined Cycle) technology. This technology should improve the position of hard coal with respect to both emissions and energy efficiency which, combined with the abundant and world-wide supplies of coal and its great price stability, should enable coal to be a very attractive energy source for power generation.

In this context, it is important to mention that the world's first major coal gasification plant for electricity generation (253 MW) in Beggenum in the Netherlands has started its first operational tests. The second project is that of ELCOGAS in Puertollano in Spain, which is supported by the Community's THERMIE programme and which should begin operating in 1997. This project is supported by electricity generating companies from Spain, France, Italy, Portugal, and the United Kingdom, together with the two German suppliers of the equipment. The plant under construction is designed to produce 305 MWe.

5. THE COKE MARKET

After a substantial drop in the first quarter of 1993, Community crude steel production stabilised for several months, before picking up to ensure a total production for the year of 132 Mt, the same total as in 1992. This level of production was achieved mainly thanks to the spectacular growth in Community steel exports to Asia and the USA.

The slump in production in Germany and France, of the order of 5% and 6% respectively, was offset by increases of between 4 and 6% in production in Italy, the United Kingdom and Spain.

During the first five months of 1994, Community steel production maintained an upward trend of 2.8%, compared with the same period in 1993, but there now appears to have been a certain trend towards stability since April.

Actual steel consumption in the Community in 1994 should be around 112.5 Mt, which is 2.6% above that for the preceding year. Apparent consumption could amount to 113.5 Mt, which would be 3.6% above that for 1993. In view of the continuing high level of exports, production should reach 133.5 Mt, which would represent an increase of 1.1% over the 1993 figure⁽³⁾.

At 39.4 Mt during 1993, coke production was some 5 Mt lower than for the previous year. Estimations for 1994 point to around 38.7 Mt, which would be 0.8 Mt less than in 1993.

Total inland deliveries amounted to 41.9 Mt in 1993 and the forecasts for 1994 are for 41.1 Mt (down 0.8 Mt). Deliveries to the steel industry are forecast at 36.9 Mt, compared with 37.1 Mt supplied in 1993 and more than 39 Mt in 1992.

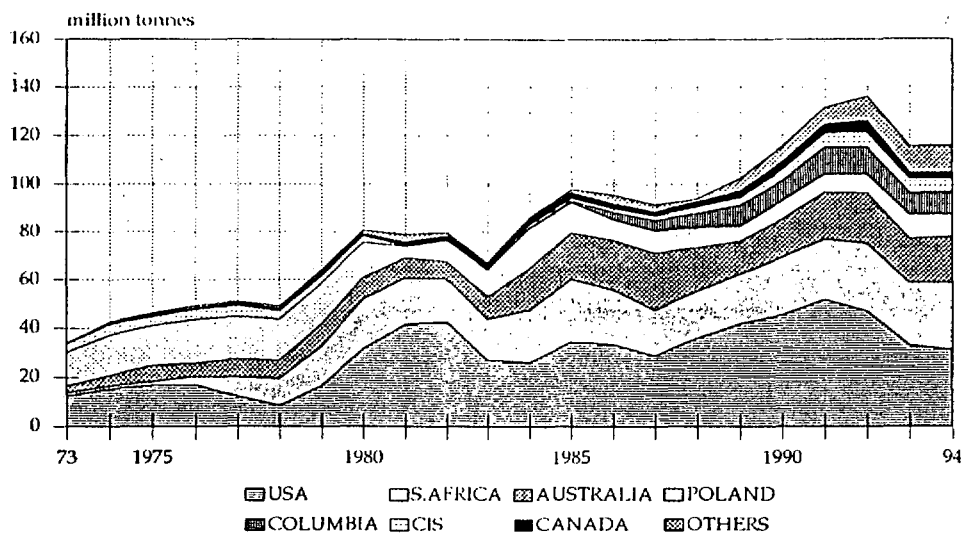
A similar trend is expected during 1994 for intra-Community trade of coke, whilst direct imports from third countries could see a certain increase. Forecasts for intra-Community trade in 1994 point to 1.7 Mt in terms of receipts, compared to 2.2 Mt in 1993, whilst direct imports from third countries are likely to rise by 0.3 Mt to 3.4 Mt.

(3) Forward programme for steel for the second half of 1994. ECU.

6. HARD COAL IMPORTS FROM THIRD COUNTRIES.

Imports of hard coal from third countries in 1993 fell by 20.4 Mt to 115.9 Mt. This decrease was considerably greater than had been expected at the beginning of 1993 and was the logical consequence of the lower demand for hard coal and the huge existing stocks, even though the annual cutback in Community coal production was one of the largest ever seen. The reduction in the level of imports mainly affected steam quality coal.

HARD COAL IMPORTED FROM THIRD COUNTRIES

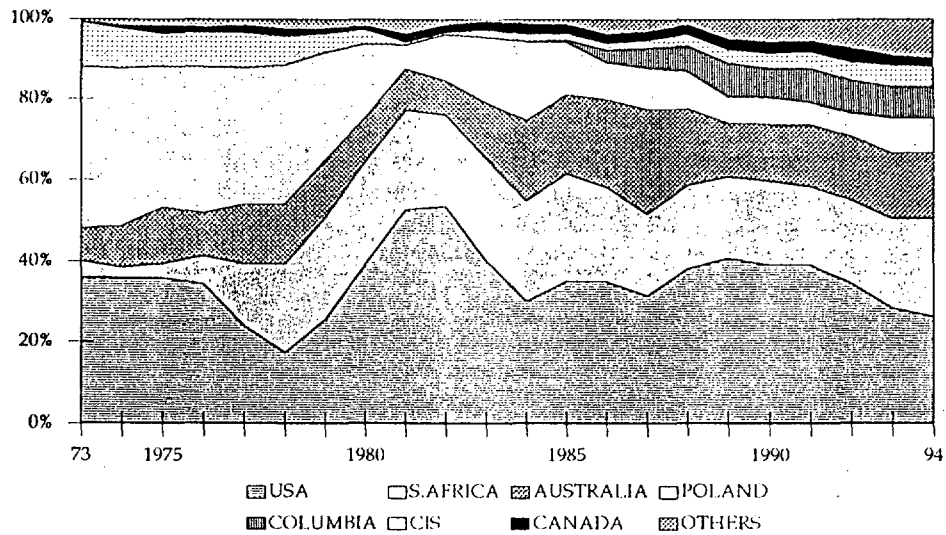


* Including new German Länder from 1991

The drop in the level of imports was fairly general. Only three Member states defied the trend but these totalled less than 1 Mt altogether. The most marked decreases were in France, followed by Italy, Germany and the United Kingdom. The reasons for this have been covered previously.

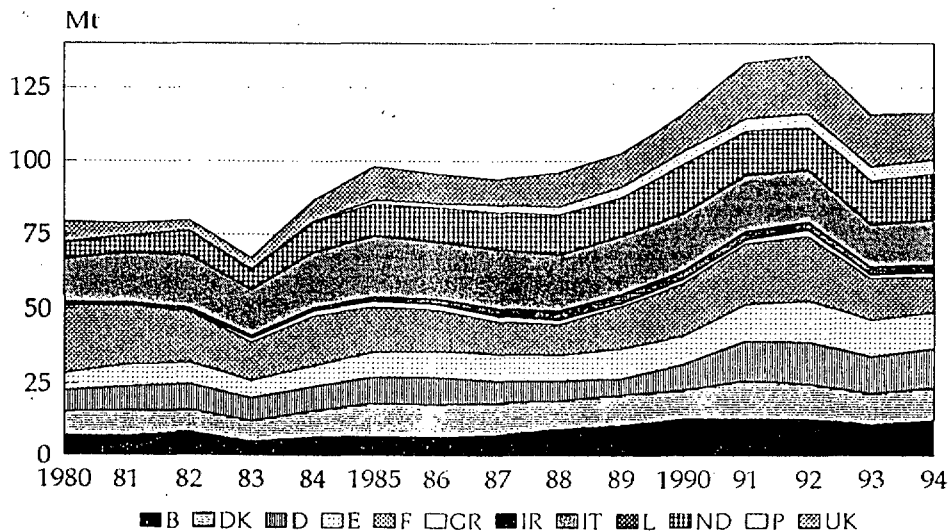
By suppliers, the most important change was that of the United States, which accounted for three quarters of the total decrease. Only Poland and Indonesia saw an increase in their level of exports to the Community.

HARD COAL IMPORTED FROM THIRD COUNTRIES MARKET SHARES



* Including new German Länder from 1991

HARD COAL FROM THIRD COUNTRIES BY MEMBER STATE



* Including new German Länder from 1991

For 1994, forecasts point to a very small increase in imports, of just 0.9 Mt (0.8%), to 116.9 Mt. The expected cutbacks in production and the slight decrease in stocks, together with the decrease in demand, do not leave much room for any significant variation in import quantities during 1994 compared to 1993. By Member State, the biggest decreases are forecast for France and the United Kingdom with a drop of 1.9 Mt each. On the other hand, forecasts for most of the remaining Member States point to a certain increase in

import volumes. By suppliers, the United States will probably witness the largest drop, whilst South Africa will continue to increase its market share.

6.1. Prices for imported coal

The average CIF price for Community steam coal imports from third countries for power stations in 1993, in US dollars, decreased to 44.8 US dollars per tce (-15.5%) compared to the average price in 1992 of 51.8 US dollars per tce. However, the appreciation of the US dollar compared to the Community currency offset two thirds of this decrease, to such an extent that prices were 4.4% lower during 1993 when expressed in ECU.

AVERAGE CIF PRICE FOR STEAM COAL IMPORTED FROM THIRD COUNTRIES (\$/tce) *		
QUARTER	1992	1993
I	53.17	46.96
II	51.60	45.92
III	52.36	42.80
IV	50.11	43.12
Average	51.77	44.81

* Imports for power stations

The 1993 guide price for coking coal imports from third countries decreased, on average, by more than 3% in terms of US dollars when compared with 1992, although it increased by more than 7% when expressed in terms of ECUs. Prices have been declining in terms of US dollars ever since the first quarter of 1991.

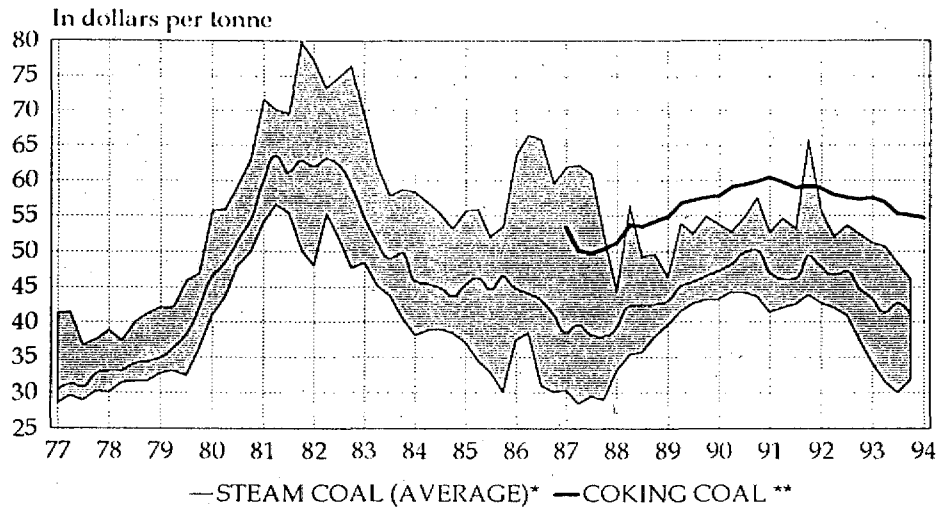
GUIDE CIF PRICE FOR COKING COAL IMPORTED FROM THIRD COUNTRIES (\$/t)*			
QUARTER	1992	1993	1994
I	58.90	57.50	54.70
II	58.00	56.80	
III	57.50	55.30	
IV	57.30	55.00	

* Referred to a standard coal quality of : ash, 7.5%; moisture, 8.0%; sulphur, 0.8%; and volatile matter, 26.0%.

Since the turn of the year, there have been signs that the international sea-borne trade in hard coal is on an upswing after the decline seen in 1993. Demand on the international coal market has concentrated increasingly on suppliers such as South Africa, Colombia, Indonesia, China and Poland in recent months.

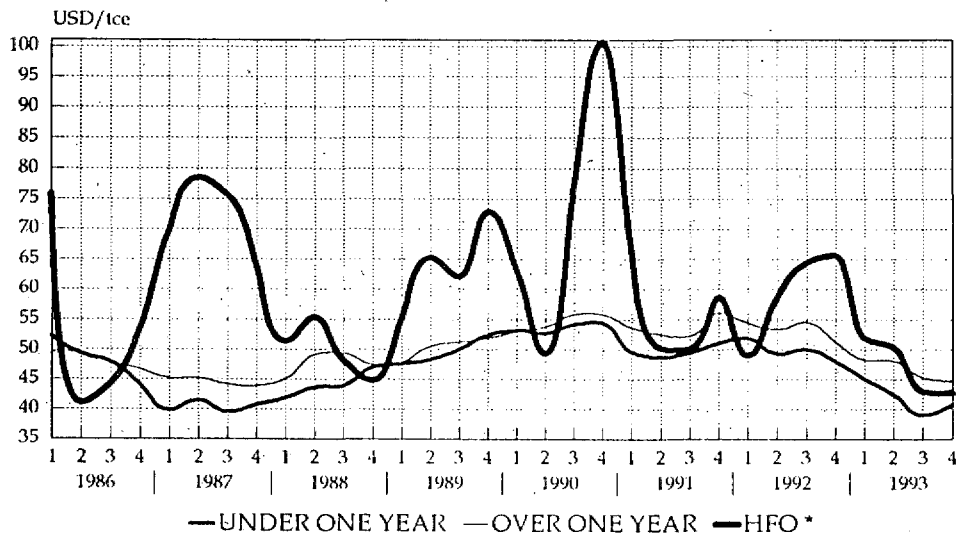
There has been a slight recovery of hard coal prices during the first half of this year, whilst ocean freight rates have been roughly stable.

AVERAGE CIF PRICES FOR HARD COAL IMPORTED FROM THIRD COUNTRIES



*WEIGHTED AVERAGE PRICE (price range)
**GUIDE PRICE (new reference)

CIF PRICES FOR COAL IMPORTS CONTRACT PRICES FOR STEAM COAL



* Spot price Rotterdam; 3.5% sulphur

7. LIGNITE

During 1993, the lignite available, including imports, was some 302 Mt, which is 22.6 Mt down on the 1992 figure. This was due mainly to the lower demand from power stations in Germany.

For 1994, total resources are expected to decrease again by 8.3 Mt to 293.2 Mt. Power stations are expected to consume some 233.5 Mt, which represents almost 80% of the available resources and which is roughly the same as the previous year's figure.

The expected drop in demand for lignite is likely to be the result of the fall in demand from the German briquetting plants: Deliveries to this sector could decrease by 7.1 Mt to 40.7 Mt. The decrease in demand for lignite briquettes is expected to continue over the next few years as alternative fuels, such as petroleum products and natural gas, are viewed by the consumers as being more convenient.

8. CONCLUSIONS.

The expected increase in the Community's GDP during 1994 is likely to lead to an increase in total energy demand. However, solid fuels are likely to be the only primary energy source which will remain unaffected by this increase in energy demand and may, in fact, witness a significant decrease.

The revised forecasts for coal during 1993 point to a further contraction of the Community market for solid fuels, and an especially marked decline for hard coal.

Total deliveries of hard coal are expected to fall by 17.0 Mt during 1994 with respect to the 1993 figures, to a new low of 255.8 Mt which is the lowest ever seen in the Community. Whilst the drop is generalised across all sectors, it is expected to be especially marked in the electricity generating industry. By country, the most significant drop is that forecast for the United Kingdom. However, it has to be pointed out that, if the United Kingdom is excluded, then the trend for the remaining countries as a whole is for an increase of 1.2 Mt.

Community production will continue to decline during 1994, whilst imports from third countries could see a moderate upswing after the marked decline registered during 1993. Production could decrease by 25.8 Mt to a new low of 132.8 Mt and imports rise by a mere 0.9 Mt to 116.9 Mt.

Total hard coal stocks could see a small reduction, but will probably continue to be greater than 110 Mt.

The coke market continues to shrink as a result of the lower demand from the steel industry, despite the fact that total crude steel production could see a certain increase during 1994 compared to 1993. This is due to improvements in the steel-making processes, which will continue to lead to a lower demand for coke in the future.

The lignite market also is expected to decrease in 1994 as a result of the lower demand expected from the briquetting plants. This will more than offset the slight increase in demand expected from the power stations, even when including the new German Länder.

With respect to the international situation, the international coal market has witnessed a certain recovery since the beginning of the year, after the decline during 1993. This is mostly due to the increasing demand from the Asiatic markets. However, since there are surpluses on the international market, prices are not expected to see any significant variation in the foreseeable future.

ANNEXES

TABLE 1

HARD COAL BALANCE SHEET FOR 1994

2/3/94

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem- bourg	Nether- lands	Portugal	United Kingdom	EUR-12
1. PRODUCTION (t=t)			57750	17700	8200		1 +	10			150	49000	132811
2. RECOVERIES	660		300	30								500	1490
3. RECEIPTS FROM ECSC COUNTRIES	485		400	205	210		328 +	28	31 +	400	1	500	2588
4. IMPORTS FROM THIRD COUNTRIES	12635	11000	13100	12200	11960	1300	2516 +	15131	200 +	15950	4876	16000	116868
5. AVAILABILITIES (1+2+3+4)	13780	11000	71550	30135	20370	1300	2845 +	15169	231 +	16350	6027	66000	251169
6. TOTAL INLAND DELIVERIES	13205	12700	74860	30100	20390	1400	2825	15840	231 +	14250	5027	65000	255828
A.- POWER STATIONS AT MINES			1500		2700								4200
B.- POWER STATIONS	5915	12000	46650	24000	4000	90	2000	5700		9400	3846	43000	156601
C.- COKING PLANTS	5200		14000	4350	7800			6900		4000	395	8500	51145
D.- IRON AND STEEL INDUSTRY (of which POWER STATIONS)	800		2500		1800	55	1	1460	100 +	600		500	7616
E.- OTHER INDUSTRIES (of which POWER STATIONS)	710	400	8200	1500	2700	1255	237	1240	130 +	250	786	6500	23903
F.- DOMESTIC HEATING	575	300	1250	200	1000		586	60	1 +			4300	8272
G.- MISCELLANEOUS (TOTAL 1 - 6)	5		760	50	390		1	480				2200	3886
1. ISSUE TO WORKERS			90	40									130
2. PATENT FUEL PLANTS	5		500		329 *							1300	2134
3. OWN CONSUMPTION AT MINES			50	10	58 *								118
4. GASWORKS													
5. RAILWAYS			70										70
6. OTHERS			50		3 *		1	480				900	1434
7. DELIVERIES TO ECSC COUNTRIES	575		1100		347 *		20			2100		900	5042
8. EXPORTS TO THIRD COUNTRIES	25		20		153 *							100	298
9. TOTAL DELIVERIES (6+7+8)	13805	12700	75980	30100	20890	1400	2845	15840	231 +	16350	6027	66000	256126
10. MOVEMENT OF PRODUCERS' AND IMPORTERS STOCKS (5-9)	-25	-1700	-4430	35	-520	-100		-671					-7411

* Commission estimates; + figures supplied in January 1994

TABLE 2

HARD COAL BALANCE SHEET FOR 1993

2/8/94

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem- bourg	Nether- lands	Portugal	United Kingdom	EUR-12
1. PRODUCTION (t=t)			64175	18183	8576		1 +	20			197	67463	158615
2. RECOVERIES	709		607	35	412							736	2499
3. RECEIPTS FROM ECSC COUNTRIES	485	148	540	370	331		330 +	13	23 +	252	4	496	2992
4. IMPORTS FROM THIRD COUNTRIES	11224	10318	12627	12168	13902	1337	2295 +	14287	245 +	14875	4762	17904	115944
5. AVAILABILITIES (1+2+3+4)	12418	10466	77949	30766	23221	1337	2626 +	14320	268 +	16127	4963	86689	277068
6. TOTAL INLAND DELIVERIES	11863	12000	75791	30852	21297	1452	3106	15029	268 +	13067	4962	83161	272848
A.- POWER STATIONS AT MINES			1481		2978								4459
B.- POWER STATIONS	5090	11207	46271	25144	3698	97	2144	5483		7544	3846	60529	171053
C.- COKING PLANTS	4706		15370	4565	8100			6861		4090	352	8426	52470
D.- IRON AND STEEL INDUSTRY (of which POWER STATIONS)	731		2016		1879	66	1	1153	165 +	846		500	7357
E.- OTHER INDUSTRIES (of which POWER STATIONS)	718	465	8494	900	2925	1287	277	1250	102 +	579	764	6808	24569
F.- DOMESTIC HEATING	613	328	1258	200	1292		683	60	1 +	6		4638	9079
G.- MISCELLANEOUS (TOTAL 1 - 6)	5		901	43	425	2	1	222		2		2260	3861
1. ISSUE TO WORKERS			100	40									140
2. PATENT FUEL PLANTS	5		598		359							1355	2317
3. OWN CONSUMPTION AT MINES			64	3	63							48	178
4. GASWORKS													
5. RAILWAYS			58			1							59
6. OTHERS			81		3	1	1	222		2		857	1167
7. DELIVERIES TO ECSC COUNTRIES	619		912		431		30			2216		999	5207
8. EXPORTS TO THIRD COUNTRIES	26		32		190					28		96	372
9. TOTAL DELIVERIES (6+7+8)	12508	12000	76735	30852	21918	1452	3136	15029	268 +	16311	4962	84256	273220
10. MOVEMENT OF PRODUCERS' AND IMPORTERS STOCKS (5-9)	-90	-1534	1214	-96	1303	-115	-510	-709		-184	1	2343	1623

* Commission estimates; + figures supplied in January 1994

TABLE 3

COKE BALANCE SHEET FOR 1994

2/8/94

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem- bourg	Nether- lands	Portugal	United Kingdom	EUR-12
1. PRODUCTION (t=t)	4365		11000	3050	6000			5000		2900	270	6100	38685
2. RECEIPTS FROM ECSC COUNTRIES	60	14 *		25	150		15 +	27	1100 +	175	2	100	1668
3. IMPORTS FROM THIRD COUNTRIES	550	26 *	1450		260	20	4 +	275	70 +	125	29	600	3409
4. TOTAL AVAILABILITIES (1+2+3)	4975	40 *	12450	3075	6410	20	19 +	5302	1170 +	3200	301	6800	42094
5. TOTAL INLAND DELIVERIES	4195	40 *	12670	3075	5900	20	19	5180	1100 +	2000	295	6600	41094
A.- STEEL INDUSTRY	4050		10600	2975 *	5000		12	4950	1099 +	2000	265	5900	36851
B.- OTHER INDUSTRIES	120	40 *	1000	100 *	700	20	7				30	400	2417
C.- DOMESTIC SECTOR	5		430		120			80	1 +			100	736
D.- MISCELLANEOUS of which :	20		640		80			150				200	1090
1. ISSUE TO WORKERS	10		300										310
2. OWN CONSUMPTION			5										5
3. OTHERS	10		335		80			150				200	775
6. DELIVERIES TO ECSC COUNTRIES	750		300		268 *			22		950			2290
7. EXPORTS TO THIRD COUNTRIES	30		170		132 *			100		250		200	882
8. TOTAL DELIVERIES (5+6+7)	4975	40 *	13140	3075	6300	20	19	5302	1100 +	3200	295	6800	41976
9. STOCK MOVEMENT AT													
PRODUCTION & IMPORTS (4-8)			-690		110				70 +		6		-504

* Commission estimates; + Data supplied in January 1994

TABLE 4

COKE BALANCE SHEET FOR 1993

2/8/94

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem- bourg	Nether- lands	Portugal	United Kingdom	EUR-12
1. PRODUCTION (t=t)	3975		12078	3051	6197			4900		2878	268	6094	39441
2. RECEIPTS FROM ECSC COUNTRIES	57	14	322	28	398	20	15 +	27	1135 +	67	2	94	2179
3. IMPORTS FROM THIRD COUNTRIES	565	26	1146		240	1	5 +	274	73 +	140	29	605	3104
4. TOTAL AVAILABILITIES (1+2+3)	4597	40	13546	3079	6835	21	20 +	5201	1208 +	3085	299	6793	42545
5. TOTAL INLAND DELIVERIES	3948	40	13029	3079	6122	17	20	5295	1208 +	2298	287	6548	41891
A.- STEEL INDUSTRY	3797		10834	2979	5157		13	4905	1207 +	2148	257	5837	37134
B.- OTHER INDUSTRIES	123	40 *	1049	100	718	17	7			150	30	365	2599
C.- DOMESTIC SECTOR	7		435		127			100	1 +			92	762
D.- MISCELLANEOUS of which :	21		711		120			290				254	1396
1. ISSUE TO WORKERS	7		333										340
2. OWN CONSUMPTION	6		5										11
3. OTHERS	8		373		120			290				254	1045
6. DELIVERIES TO ECSC COUNTRIES	773		486		329			67		759		5	2419
7. EXPORTS TO THIRD COUNTRIES	25		70		161			105		161	25	185	732
8. TOTAL DELIVERIES (5+6+7)	4746	40	13585	3079	6613	17	20	5467	1208 +	3218	312	6738	42623
9. STOCK MOVEMENT AT													
PRODUCTION & IMPORTS (4-8)	-149		61		222	4		-266		-133	-13	55	-219

* Commission estimates; + Data supplied in January 1994

TABLE 5

LIGNITE AND PEAT BALANCE SHEET FOR 1994

2/8/94

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem- bourg	Nether- lands	Portugal	United Kingdom	EUR-12
A. RAW PRODUCT													
- AVAILABILITIES :	226		216460	13000	1620	55000	6853 +	1018	8 +				293184
PRODUCTION			213800	13000	1620	55000	5827 +	1000					290247
IMPORTS	225		2660				26 +	18	8 +				2937
- UTILIZATION :	226		216460	13000	1695	55000	6768 +	1018	8 +				293164
BRIQUETTING PLANTS			40500			150							40650
POWER STATIONS			160200	13000 *	1500	54550	3235 +	1000					233485
OTHERS	225		15760		195	300	2523 +	18	8 +				19029
B. BRIQUETTES													
- AVAILABILITIES :	20	5 +	12310			100	391 +		11 +				12837
PRODUCTION			11950			100	384 +						12434
ARRIVAL FROM ECSC COUNTRIES	20	5 *					7 +		11 +				43
IMPORTS FROM THIRD COUNTRIES			360										360
- UTILIZATION	20	5 +	12340			100	393 +		11 +				12869
POWER STATIONS													
INDUSTRY			4350										4350
DOMESTIC	20	5 +	7220				389 +		11 +				7645
SHIPMENTS TO OTHER													
ECSC COUNTRIES							4 +						4
EXPORTS TO NON-MEMBER													
COUNTRIES			770										770
- OTHERS						100							100

* Commission estimates; + Data supplied in January 1994

TABLE 6

LIGNITE AND PEAT BALANCE SHEET FOR 1993

2/8/94

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem- bourg	Nether- lands	Portugal	United Kingdom	EUR-12
A. RAW PRODUCT													
- AVAILABILITIES :	226		224477	13347	1672	54800	6855 +	1020	8 +	81			301486
PRODUCTION			221802	13347	1671	54800	5827 +	1000					298447
IMPORTS	226		2675		1		28 +	20	8 +	81			3039
- UTILIZATION :	226		224477	13424	1755	54798	6768 +	954	8 +	78			301478
BRIQUETTING PLANTS			47491			178				35			47704
POWER STATIONS			160341	13424 *	1556	54240	3235 +	954					233750
OTHERS	226		16645		199	380	2523 +		8 +	43			20024
B. BRIQUETTES													
- AVAILABILITIES :	17	5 +	14273			93	393 +		11 +				14792
PRODUCTION			13873			93	384 +						14350
ARRIVAL FROM ECSC COUNTRIES	17	5 *					9 +		11 +				42
IMPORTS FROM THIRD COUNTRIES			400										400
- UTILIZATION	17	5 +	14273			94	395 +		11 +				14795
POWER STATIONS						53							53
INDUSTRY			4852										4852
DOMESTIC	15	5 +	8607				390 +		11 +				9028
SHIPMENTS TO OTHER ECSC COUNTRIES	2						5 +						7
EXPORTS TO NON-MEMBER COUNTRIES			814										814
- OTHERS						41							41

* Commission estimates; + Data supplied in January 1994

TABLE 7A
HARD COAL PRODUCTION BY AREA

2/8/94

(In thousands of metric tons)

	1992	1993	1994
Campine	218		
BELGIUM	218		
Ruhr	57122	51474	45220
Aachen	3480	1560	1580
Ibbenburen	2016	2066	2050
Saar+Kleinzechen	9542	9075	8900
GERMANY	72160	64175	57750
Central Asturias	3982	3714	3757
Bierzo-Villablino + Narcea	6407	6359	5959
Norte Leon + Palencia	2392	2176	2176
Sur	1953	1802	1801
Aragon-Cataluña, Baleares	3901	4132	4007
SPAIN	18635	18183	17700
Lorraine	8085	7412	
Centre-Midi	1393	1164	
FRANCE	9478	8576	8200
IRELAND	1	1 +	1 +
Sulcis (Sardinia)	30	20	10
ITALY	30	20	10
PORTUGAL	220	197	150
Scotland	2114		
North-East	6205		
Yorkshire	27332		
Nottinghamshire	15909		
Midlands	12704		
BC Opencast	15260	14414	
Licensed mines + Opencast	3916	3663	
UNITED KINGDOM	83855	67463	49000
EUR 12	184597	158615	132811

* Commission estimates; + Data supplied in January 1994

**TABLE 7B
LIGNITE PRODUCTION BY AREA**

2/8/94

(In thousands of metric tons)

	1992	1993	1994
Rheinland	107500	102100	
Helmstedt	4700	3900	
Hessen	100	100	
Bayern	100	100	
Lausitz	93100	87400	
Mitteldeutschland	36300	28200	
GERMANY	241800	221800	213800
Ptolemais		31800	34500
Megalopolis		11800	11500
Amindeo		7600	7800
Others		3600	1200
GREECE	52317	54800	55000
La Coruña	14979	13347	13000
SPAIN	14979	13347	13000
Centre-Midi	125	1671	1620
FRANCE	125	1671	1620
Valdamo		1000	1000
ITALY	1096	1000	1000
EUR 12	310317	292618	284420

* Commission estimates

TABLE 8
COAL IMPORTS FROM THIRD COUNTRIES

2/8/94

(In thousands of metric tons)

1993	U.S.A	Canada	Australia	South Africa	Poland	CIS	China	Colombia	Others	Total Imports
Belgium	3901	191	2254	3436	314	435	248	221	224	11224
Denmark	401	286	650	3282	2124	2008		1502	65	10318
Germany	876	33	733	4586	2901	247	2	707	2542	12627
Spain	3882	388	1042	4955	185	251		804	661	12168
France	4626	91	2800	2230	1115	318	598	1092	1032	13902
Greece				861		337			139	1337
Ireland	1140 +			29 +	436 +	25 +	2 +	15 +	648 +	2295 +
Italy	6498	589	2327	2290	558	1434	195	176	220	14287
Luxembourg				128 +		107 +			10 +	245 +
Netherlands	4597	160	4130	1641	1055	62	2	1404	1824	14875
Portugal	1308	196	128	2089	44	139		858		4762
UK	4288	632	4105	781	1712	876	169	2453	2888	17904
EUR-12	31517	2566	18169	26308	10444	6239	1216	9232	10253	115944

* Commission estimates; + Data supplied in January 1994

1994	U.S.A	Canada	Australia	South Africa	Poland	CIS	China	Colombia	Others	Total Imports
Belgium	4345	210	2440	4040	385	440	375	195	205	12635
Denmark	500	300	400	4000	2200	1800		1800		11000
Germany	950	30	730	4600	2900	300	10	750	2830	13100
Spain	3800	600	1000	4200		300		900	1400	12200
France	3470		2520	2800	960	300	600	750	560	11960
Greece				850		350			100	1300
Ireland	1132 +			26 +	426 +	20 +	2 +	10 +	900 +	2516 +
Italy	6541	200	2700	2705	263	1528	255	300	639	15131
Luxembourg				140 +		60 +				200 +
Netherlands	6500		5100	1150	800		100	1000	1300	15950
Portugal	845	255	200	2127	149	120		1000	180	4876
UK	3832	565	3669	698	1529	784	151	2192	2580	16000
EUR-12	31915	2160	18759	27336	9612	6002	1493	8897	10694	116868

* Commission estimates; + Data supplied in January 1994

TABLE 9

INTRA-COMMUNITY TRADE OF COAL IN 1994

2/08/94 (In thousands of metric tons)

To.	From →												Total deliveries
	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem- bourg	Nether- lands	Portugal	United Kingdom	Total receipts
Belgium			380		3 *					350			733
			420		5							60	485
Denmark												200	200
Germany	115				286 *					1200		200	1801
	124 *				220 *					45 *		10 *	400
Spain	15		5		21 *					100			141
	20		10		25					100		50	205
France	250		250							300		100	900
			150									60	210
Greece													
Ireland					18 *					50		400	468
	8 +		12 +		9 +					31 +		268 +	328 +
Italy	10		10		9 *								29
			1		27								28
Luxembourg	65												65
	30 +		1 +										31 +
Netherlands	110		180										290
	200		150		50								400
Portugal					2 *								2
										1			1
United Kingdom	10		275		8 *		20 +			100			413
	50		200		25		25			200			500
Total deliveries	575		1100		347 *		20 +			2100		900	5042
Total receipts	412		934		336		25			277		398	2588

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

* Commission estimates; + Data supplied in January 1994

TABLE 10

INTRA-COMMUNITY TRADE OF COAL IN 1993

2/08/94

(In thousands of metric tons)

To	From →												Total deliveries
	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Portugal	United Kingdom	Total receipts
Belgium			335		4					266		70	675
			410		5					4		65	485
Denmark	2											177	179
												148	148
Germany	136				357					1616		180	2289
	137 *				297 *					61 *		46 *	540
Spain	15		2		26					41		84	168
	26		22		36	2				186	3	95	370
France	268		195							192		102	757
	1		203									127	331
Greece													
Ireland			1		22					3		352	378
	8 +		12 +		9 +					33 +		268 +	330 +
Italy	7		11		11							22	51
	7		1		5								13
Luxembourg	68		1		0								69
	22 +		1 +										23 +
Netherlands	115		156									12	283
	171		62	3								16	252
Portugal					2					9			11
										1		3	4
United Kingdom	8		211		10		30 *			89			348
	36	5	226	1	26		16			186			496
Total deliveries	619		912		431		30			2216		999	5207
Total receipts	382	5	915	4	342		16			285		673	2992

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

* Commission estimates; + Data supplied in January 1994

TABLE 11

INTRA-COMMUNITY TRADE OF COKE IN 1994

2/08/94
(In thousands of metric tons)

To	From ---->												Total deliveries
	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Portugal	United Kingdom	Total receipts
Belgium			10		38 *					350			398
			15		40					5			60
Denmark								2					2
	8 *		0 *					2 *		0 *		4 *	14 *
Germany	150				129 *					400			679
Spain					13 *					50			63
	2				13			3		4	3		25
France	170		5							100			275
	75									75			150
Greece								20					20
								20					20
Ireland													
	6 +		4 +							3 +		2 +	15 +
Italy	5		15		38 *								58
			5		22								27
Luxembourg	405		240		1 *								646
	430 +		430 +							240 +			1100 +
Netherlands	15		30		10 *								55
	75		50		50								175
Portugal													
				1						1			2
United Kingdom	5				39 *					50			94
				10	50					40			100
Total deliveries	750		300		268 *			22		950			2290
Total receipts	594		499	16	162			22		364		6	1688

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

* Commission estimates; + Data supplied in January 1994

TABLE 12

INTRA-COMMUNITY TRADE OF COKE IN 1993

2/08/94 (In thousands of metric tons)

To	From ---->												Total deliveries
	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Portugal	United Kingdom	Total receipts
Belgium			15		47			3		145		1	211
			14		39					4			57
Denmark			2		0			1					3
	8		0					2		0		4	14
Germany	159				158			9		370		1	697
	162 *				96 *					64 *			322
Spain					16			3		2			21
	2				14			3		4	4	1	28
France	172		5					34		192			403
	173		3	8				32		182			398
Greece					0			17					17
								20					20
Ireland												3	3
	6 +		4 +							3 +		2	15 +
Italy	4		20		47					4			75
			5		22								27
Luxembourg	415		399		1								815
	441 +		448 +							246 +			1135 +
Netherlands	19		45		12								76
	15		40		12								67
Portugal					0								0
				1						1			2
United Kingdom	4				47					46			97
			2	10	45		1			36			94
Total deliveries	773		486		329			67		759		5	2419
Total receipts	805		511	24	214		1	54		536		6	2179

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

* Commission estimates; + Data supplied in January 1994

TABLE 13

STOCKS

02-Aug-94

(In millions of metric tons)

	Producers (Hard coal)			Power Stations (Hard coal)			Coking plants					
							(Coke)			(Hard coal)		
	(A) 1992	(A) 1993	(B) 1994	(A) 1992	(A) 1993	(B) 1994	(A) 1992	(A) 1993	(B) 1994	(A) 1992	(A) 1993	(B) 1994
Belgium	0.057	0.026		0.598	0.551	0.600	0.181	0.078	0.078	0.431	0.395	0.400
Denmark				8.261	6.852	5.850						
Germany	19.678	20.400	15.740	14.640	14.000	13.500	4.898	4.958	4.268	0.310	0.340	0.320
Spain	1.219	1.150	1.100	9.174	9.149	9.100	0.171	0.170	n.a.	0.452	0.622	0.550
France	2.480	2.195	1.750	6.311	4.947	6.000	0.460	0.426	n.a.	0.912	0.959	1.960
Greece							0.003	0.003	n.a.			
Ireland	0.020	0.020	n.a.	0.503	0.525	0.475						
Italy				1.578	1.375	n.a.	0.180	0.180	n.a.	1.000	0.678	n.a.
Luxembourg												
Netherlands				1.750	1.750 *	n.a.	0.200	0.250	n.a.	0.454	0.500 *	n.a.
Portugal	0.001	0.005		0.801	0.629	0.700	0.022	0.020	0.015	0.037	0.026	0.026
United Kingdom	13.714	15.470	15.469	32.173	28.579	n.a.	0.706	0.735	n.a.	1.271	1.218	n.a.
COMMUNITY	37.169	39.266	n.a.	75.789	68.357	n.a.	6.821	6.820	n.a.	4.867	4.738	n.a.

(A) Actual; (B) Estimates; * Commission estimates

TABLE 14
PERSONNEL EMPLOYED UNDERGROUND
(yearly average)

02-Aug-94

(in thousands)

	1992	1993	1994
	Actual	Estimates	Forecasts
Belgium	0.8	0.2	0.0
Germany	78.3	71.8	65.2
Spain	30.0	25.0	22.8
France	7.5	7.0	6.8 *
Portugal	0.5	0.5	0.5 *
United Kingdom	36.0	21.0	15.0 *
Ireland	0.3	0.3	0.0 *
Community	153.4	125.8	110.3

* Commission estimates

TABLE 15
OUTPUT PER MAN/HOUR UNDERGROUND

02-Aug-94

(Kg per man/hour)

	1992	1993	1994
	Actual	Estimates	Forecasts
Belgium	268	0	0
Germany	698	710	710
Spain	328	390	374
France	743	731	740 *
Portugal	na	na	na
United Kingdom	919	1220 *	1250 *
Community	703	777	na

* Commission estimates