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REPORT FROM THE COMMISSION

THE MARKET FOR SOLID FUELS IN THE COMMUNITY IN 1994 AND THE OUTLOOK FOR 1995

(Revision*)

* Revision of Commission report SEC(95)496 final

INDEX

List of tables

List of graphics

LIST OF ANNEXES

THE MARKET FOR SOLID FUELS IN THE COMMUNITY IN 1994 AND THE OUTLOOK FOR 1995
(revision)

1. INTRODUCTION

This report summarizes the situation of the Community solid fuel market in 1994 and gives the Member States' forecasts for 1995 from information forwarded to the Commission in June 1995.

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 1994 and the outlook for 1995"[1], which gave the forecasts made at the end of 1994 and in January 1995. At the end of the current year, a preliminary report will be drawn up with the provisional results for 1995 and the outlook for 1996.

The information contained in this report is referred to the Community as it was in 1994. However, data for the new Member states is provided in the annexed tables.

2. ECONOMIC SITUATION[2]

The pace of the recovery was considerably stronger in 1994 than had initially been anticipated, with EC output expanding by 2¾ per cent. The rebound was driven by a strong pick-up in the world economy outside the Community, a marked easing of monetary conditions within the Community, and significant adjustment efforts on the part of Community enterprises leading to higher productivity, improved competitiveness and better profitability.

The economic expansion is expected to continue at a healthy pace of around 3 per cent in 1995. Buoyant world trade conditions are expected to sustain Community exports which should increase in real terms by 7.5 per cent this year. Investment spending, estimated to have grown by 2.4 per cent in 1994, is projected to increase by 6.3 per cent in 1995. This pattern of growth - with investment growing at a brisk pace - corresponds closely to what is necessary to create conditions for a long period of strong growth.

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(1) SEC(95) 496 final
(2) Economic forecasts 1995. Spring 1995. EC.

The recent weakening of the US dollar in the foreign exchange markets and the substantial depreciations experienced by some European currencies are impacting negatively on the overall Community growth prospects. Community exports become, on average, more expensive on world markets and business confidence suffers from the uncertainty induced by exchange rate instability. Moreover, the exchange rate movements within the Community may result in short-term differential effects on the growth prospects of countries whose currencies have depreciated compared with those which appreciated.

The expected healthy expansion of the economic activity in 1995 could lead to a marked increase in employment by about one per cent. The pick-up in employment is much faster than in the first years of the recovery in the early 1980's, essentially reflecting the stronger rebound in GDP growth. However, given that the labour force is expected to resume growth, unemployment in the Community is expected to decline slowly from an average 11.2 per cent to around 10¾ per cent in 1995, which is still unacceptably high.

While stable inflation of 3¼ per cent in 1995 is forecast in the Community as a whole, inflation performances across Member countries are likely to become more diverse this year, as some of the depreciating countries may be facing an upward pressure on prices.

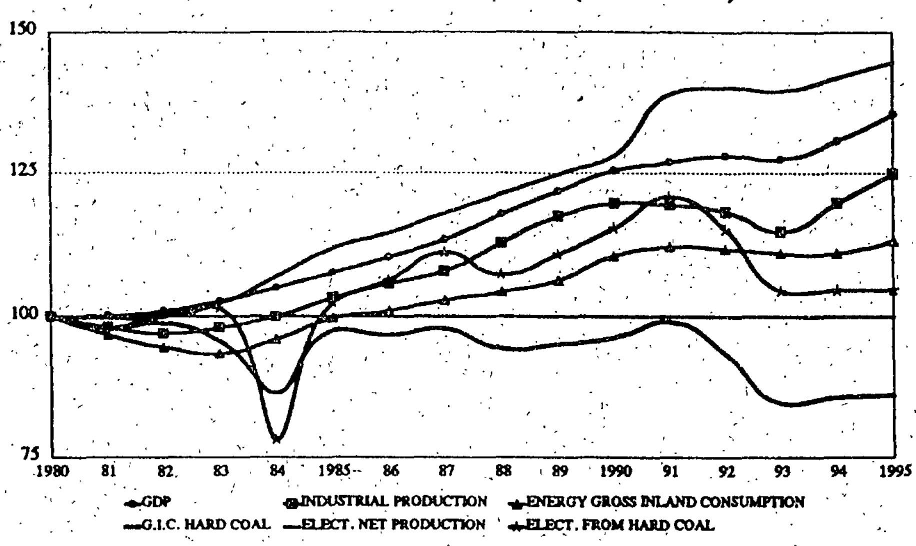
Progress towards sounder public finances remains insufficient. For the Community average, budget deficits are expected to decline from last year's 5½ per cent of GDP to 4½ per cent of Community's GDP in 1995.

MAIN FEATURES OF SPRING 1995 FORECAST –EUR (a)

	Spring 1995			Difference with Autumn 1994 (b)	
	1993	1994	1995	1994	1995
GDP growth	-0.5	2.7	3.1	0.1	0.1
Investment in equipment	-9.5	2.5	9.2	0.1	1.6
Employment	-2.2	-0.5	1.0	0.1	0.2
Unemployment (%) (d)	10.8	11.2	10.7	0.3	0.4
Inflation (c)	4.0	3.2	3.2	0.1	0.3
Gen. Govt. net borrowing (% GDP)	-6.3	-5.5	-4.5	0.2	0.4
Current account balance (% GDP)	-0.1	0.2	0.3	-0.1	-0.2

(a) Real annual percentage change unless otherwise stated.
(b) A "+" ("-") sign means a higher (lower) positive figure or a lower (higher) negative one compared with the Autumn.
(c) Private consumption deflator; annual percentage change.
(d) The revision of unemployment data by Eurostat for years 1991-94 is responsible for the increase in unemployment figures in the Spring forecast compared to Autumn 1994.

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



*G.I.C.: GROSS INLAND CONSUMPTION

3. COMMUNITY ENERGY MARKET.

Despite the fact that industrial production and GDP grew by 4.3% and 2.7 respectively, total primary energy demand (in terms of gross inland consumption) in the Community during 1994 remained roughly steady compared to 1993. The main factor explaining this behaviour in energy demand is the warm weather conditions registered during 1994 compared to 1993.

When examining the different primary energy sources, it emerges that only natural gas, hard coal and hydro saw an increase in demand, whilst lignite, nuclear, oil and oil equivalents saw decreases.

Whilst hard coal demand increased by some 1.2%, lignite dropped by more than 6%. This caused the gross inland consumption of solid fuels to fall by 0.6 % compared to 1993.

GROSS INLAND CONSUMPTION - EU - (million toe)

	1993	1994	1994/1993 (%)	share in 1993 (%)	share in 1994 (%)
Hard coal	174.4	176.5	1.2	14.6	14.8
Lignite	58.6	55.1	-6.1	4.9	4.6
TOTAL SOLID FUELS	233.0	231.6	-0.6	19.5	19.4
OIL	522.1	519.1	-0.6	43.7	43.4
NATURAL GAS	242.2	246.0	1.6	20.3	20.6
NUCLEAR	176.7	175.5	-0.7	14.8	14.7
OTHERS	21.2	22.6	6.5	1.8	1.9
TOTAL	1195.3	1194.8	-0.0	100	100

For 1995, the expected growth in GDP of the order of 3.1% could result in a rise of around 2% in total energy demand, assuming normal weather conditions.

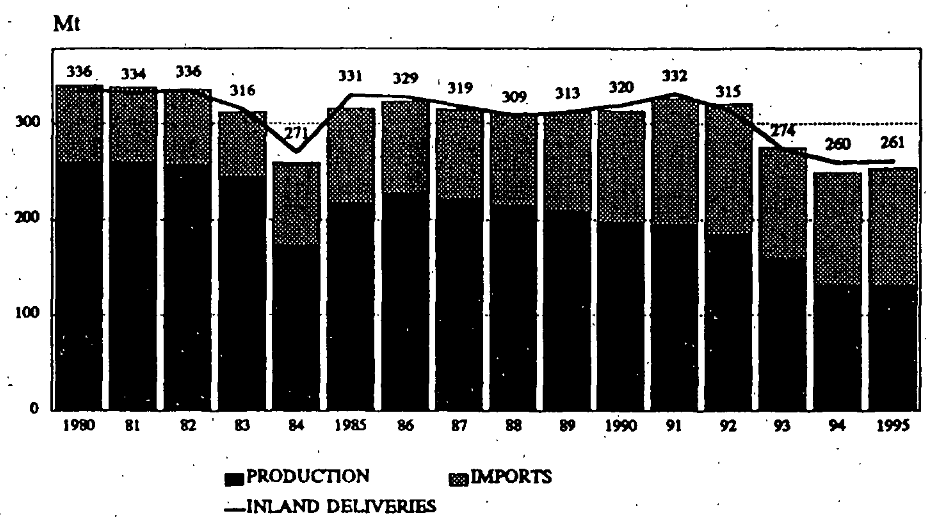
Lignite and hydro are likely to be the only primary energy sources to witness a fall in demand during 1995 compared to 1994. Hard coal could remain roughly steady in terms of consumption, whilst natural gas should see the largest increase.

4. HARD COAL MARKET.

The revised forecasts for hard coal for 1995 point to a very slight recovery compared to 1994 and the previous estimates for 1995. Total internal deliveries are forecast at 261.5 Mt, which is only 0.6 Mt or 0.2% higher than the 1994 figure.

On the supply side, Community production is expected to decrease by just 0.1 Mt (-0.1%) to 131.3 Mt. At the same time, however, hard coal imported from third countries could increase by 5.0 Mt to 122.3 Mt. Taken together, and including recoveries, the forecasts point to the total resources available being 256.0 Mt, compared to 250.4 Mt in 1994 and some 331.6 Mt just four 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 the small rise across all the consumer sectors, except for the two main consumer sectors: public power stations and cokeries.

The revised forecast for 1995 is only 0.7 Mt higher than that made in the previous report. Therefore, the main trends and arguments presented previously remain fully valid.

Total production and imports are estimated to be more than 5 Mt lower than the anticipated demand. This should lead to a further reduction in the level of the stocks held both by the producers and the importers. Also stocks at power plants should continue to decline during 1995.

The coke market is expected to decline slightly, despite the growth expected in the production of crude steel expected for this year. This reverses the exceptional upturn seen during 1994. This decline in the demand for coke can be explained by the technological changes being introduced into the blast furnaces (pulverized coal injection) and by the increasing use of electrical furnaces. Furthermore, Community coke production continues to decline, whilst imports of coke from third countries are rising.

The lignite market is also likely to continue declining, mainly as a result of the lower demand from the power stations.

COMPARISON OF THE MAIN FEATURES OF THE SOLID FUEL MARKET (million tonnes)						
	1994 previous	1994 latest	1995 previous	1995 latest	1995 latest/ previous(%)	1995/94 (%)
HARD COAL						
Resources						
- Production	132.0	131.4	130.4	131.3	0.7	-0.1
- Recoveries	1.5	1.7	1.7	2.4	45.2	43.8
- Imports from third countries	120.0	117.3	122.4	122.3	-0.1	4.3
Total	**253.5**	**250.4**	**254.4**	**256.0**	**0.6**	**2.2**
Deliveries						
- To coking plants	50.4	50.2	50.9	50.1	-1.5	-0.1
- To power stations*	172.0	174.7	172.2	173.7	0.9	-0.5
- To others	37.3	36.1	37.7	37.8	0.4	4.7
- Exports to third countries	0.3	0.4	0.3	0.3	0.3	-18.3
Total	**260.0**	**261.3**	**261.0**	**261.8**	**0.3**	**0.2**
COKE						
Resources						
- Production	37.7	38.3	37.0	37.3	0.9	-2.4
- Imports from third countries	3.7	3.6	3.8	4.5	18.8	24.7
Total	**41.4**	**41.9**	**40.8**	**41.8**	**2.6**	**-0.1**
Deliveries						
- To steel industry	39.4	39.5	38.3	39.4	3.1	-0.2
- Other deliveries within the Community	4.1	4.0	3.8	4.0	6.1	0.7
- Exports to third countries	0.7	0.6	0.6	0.5	-27.8	-18.4
Total	**44.2**	**44.1**	**42.7**	**43.9**	**2.9**	**-0.4**
LIGNITE AND PEAT						
Resources						
- Production and imports	284.0	285.4	271.7	272.1	0.1	-4.7
Deliveries						
- To briquetting plants	38.4	39.2	33.4	33.4	-0.1	-14.7
- To power stations	229.9	230.6	221.8	222.1	0.1	-3.7
- Others (including exports to third countries)	18.8	16.8	16.5	16.2	-1.5	-3.1
Total	**287.1**	**286.5**	**271.7**	**271.8**	**0.0**	**-5.2**

(!) 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 131.4 Mt in 1994 which is down by 27.2 Mt compared to 1993.

COMPARISON OF THE HARD COAL PRODUCTION FOR THE MAIN PRODUCER COUNTRIES (Mt)						
Member State	1993	Results in 1994		Forecasts for 1995		1995/94
		previous	latest	previous	latest	(%)
United Kingdom	67.5	48.6	48.0	47.0	47.0	-2.1
Germany	64.2	57.5	57.6	58.1	58.9	2.2
Spain	18.2	18.3	18.2	17.7	17.8	-2.1
France	8.6	7.5	7.5	7.6	7.6	2.0
Portugal	0.2	0.2	0.1	–	–	-100.0
Others	0.0	0.0	0.0	0.0	0.0	0.0
Total	**158.6**	**132.0**	**131.4**	**130.4**	**131.3**	**-0.1**

For 1995, current forecasts indicate a certain stability as production is only expected to decrease by 0.1 Mt to reach 131.3 Mt. Revised forecasts for production during 1995 have been modified upwards by 0.9 Mt, mainly as a result of the higher output expected in Germany and, to a much lesser extent, in France.

The most significant decreases are expected to be in the United Kingdom, with a fall of 1.0 Mt (-2.1%) due to the lower demand for hard coal from the power stations as a result of the withdrawals from the existing coal stocks, and Spain, with an anticipated drop of some 0.4 Mt (-2.1%).

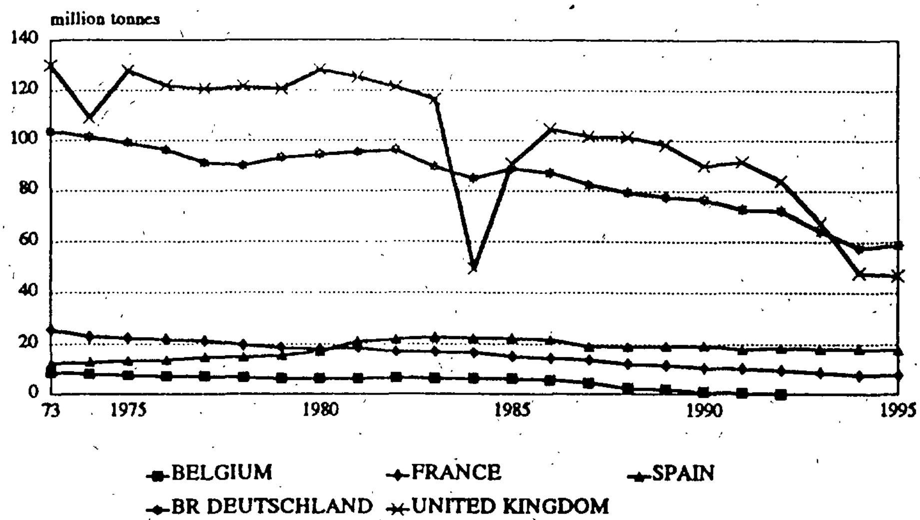
On the other hand, production could increase by 1.3 Mt (2.2%) in Germany and by 0.1 Mt (2.0%) in France. Both increases are arising from a particular situation as production is expected to decline over the coming years.

In the United Kingdom, with the existing contracts with the electricity generating industry, coal production should not suffer any large scale decrease before the expiring of the current contracts in March 1998. On the other hand, it is possible that the UK could have surpluses of coal at competitive prices from mid-1996 onwards which could be offered to other Community markets. The current contracts with 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.

In Germany, as a result of the decision on the "Kohlephenning" of the Constitutional Court, a new financing scheme starting from 1996 will be enacted. The German Government has decided to transfer all the aids to the coal industry to the public budget.

Whilst domestic hard coal should continue to 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 for steam coal delivered to the power stations.

HARD COAL PRODUCTION



4.2. <u>Deliveries of hard coal.</u>

In 1994, internal hard coal deliveries in the Community totalled 260.9 Mt, which is some 13 Mt less (-4.8%) than in the previous year. This decrease was due to the lower demand from all the consumer sectors, with the only exception being of thermal coal deliveries to the steel-making industry and "other industries". The most marked reductions were of 8.9 Mt (-5.2%) in deliveries to the public power stations and the drop of 2.3 Mt (-4.4%) in deliveries to the cokeries. The decreases in deliveries to industry in general and domestic heating were 0.5 Mt (-2.2%) and 1.3 Mt (-14.2) respectively.

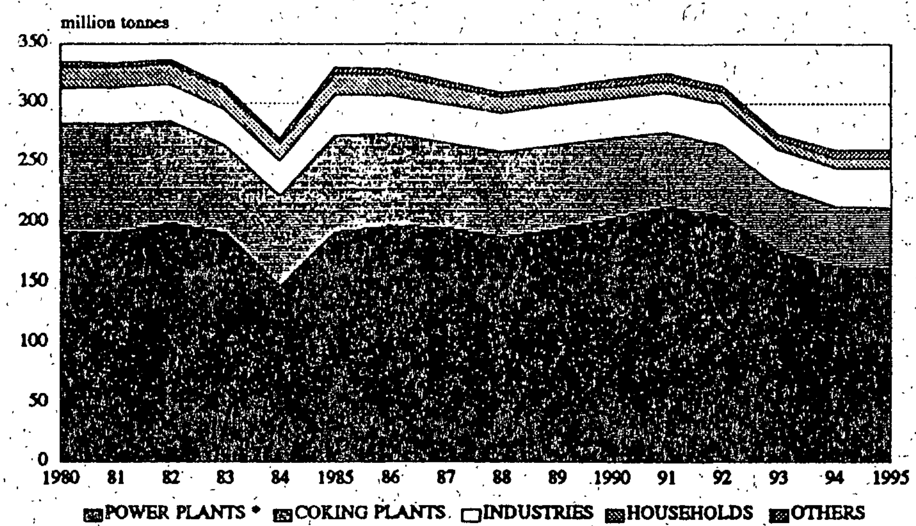
Despite the fact that hard coal deliveries were lower in 1994 compared to 1993, total consumption rose by 1.2%, mainly as result of the draw on stocks at the power stations. These stocks decreased by more than 19 Mt.

Deliveries to the domestic heating market exhibited the same downwards as in the past, although the warm weather conditions registered during 1994 have accentuated this trend.

With respect to coal delivered for public electricity generation, the most significant decreases have been in the United Kingdom (-14.4 Mt), followed by France (-1.0 Mt). On the other hand, the increases were seen in Germany (4.0 Mt), the Netherlands (3.0 Mt) and Italy (1.2 Mt). Total stocks at the power plants decreased by more than 19 Mt during 1994, which implies that the actual consumption of hard coal by the public electricity generating sector during 1994 was slightly higher than in the previous year.

The main reason explaining this trend is to be found in the increasing demand for electricity and the lower production from the nuclear plants. This gap has been covered by the higher production from the hydropower and conventional thermal power stations. However, when examining the latter, electricity produced from lignite, oil and oil equivalents fired plants decreased whilst production from hard coal and particularly natural gas fired plant increased.

INLAND DELIVERIES OF HARD COAL



* Public and pithead power stations
** Including new German Länder from 1992

For 1995, total internal hard coal deliveries are expected to increase by a mere 0.6 Mt (0.2%) to reach 261.5 Mt. This is enough to stop the declining that has been observed during recent years.

By sector, the forecasts are for a generalized increase with the two exceptions being the deliveries to the two main coal consumers: the public power stations and cokeries. However, the declines affecting these two sectors are rather small, -1.2 Mt (-0.8%) for the power stations and -0.1 Mt (-0.1%) for the cokeries.

By country, the decrease is expected to be particularly marked in the United Kingdom, with a decline of some 3.1 Mt (-4.7%), followed by Denmark with 0.8 Mt (-7.0%). On the other hand, most of the remaining Community countries are expected to increase their deliveries, being the most marked rise being that of Italy with 1.3 Mt.

DELIVERIES OF HARD COAL TO THE MAIN CONSUMER SECTORS (Mt)			
Sector	**1994**	**1995**	**1995/94 (%)**
- Public power stations	163.3	162.0	-0.8
- Colliery power stations	4.8	5.0	4.7
- Coke ovens	50.2	50.1	-0.1
- Steel industry*	8.1	8.1	0.9
- Other industries*	24.0	25.1	4.5
- Domestic sector and issues to workers	7.9	8.2	3.3
- Others **	2.7	2.9	8.1
Total inland deliveries	**260.9**	**261.5**	**0.2**

* including the own generating power requirements.
** others and statistical differences

With respect to the deliveries of coal to the public power stations, the main decrease, of some 5.1 Mt (-10.9%), is expected in the United Kingdom.
The other principle drop, of 0.8 Mt (-6.9%), is expected in Denmark. On the other hand, Spain is expected to increase its deliveries by 1.2 Mt and Italy by 1.1 Mt. Other variations, mostly upwards, are lower than 1 Mt.

Bearing in mind the volume of deliveries forecast for 1995, further significant tonnages could be taken from the stocks at the public power stations.

With respect to public power sector, the main fact to highlight is the change registered in the net installed generating capacity. By the end of 1994 total generating capacity was 463 GW compared to 459 GW at the end of 1993. The main variations in the maximum net generating capacity were in thermal monovalent plants, with a drop of 2.3 GW in hard coal-fired stations to 47.3 GW and the rise of 6.4 GW in natural gas-fired-stations to a new total of 34.3 GW.

5. THE COKE MARKET

For 1995, actual steel consumption in the Community should be around 131.0 Mt, which is 3.7% above that for the preceding year. Apparent consumption could amount to 131.5 Mt, which would be 4.2 % above that for 1994. Production could reach 143.5 Mt, which would represent an increase of 3.3% over the 1994 figure(3).

At 38.3 Mt during 1994, coke production was some 1.1 Mt lower than for the previous year. Estimations for 1995 point to around 37.3 Mt, which would be 1.0 Mt less than in 1994.

(3) Forward programme for steel for the second half of 1995. EC.

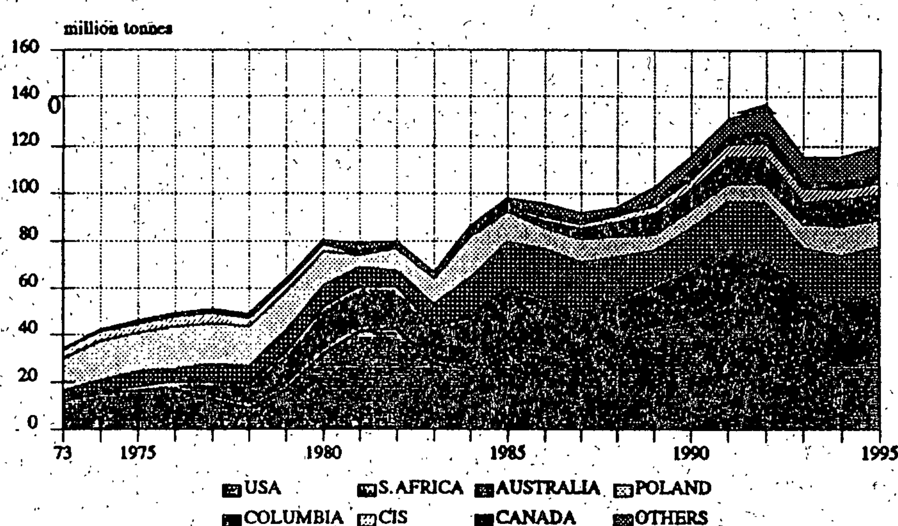
Total inland deliveries amounted to 44.1 Mt in 1994 and the forecasts for 1995 are for 43.9 Mt (down 0.2 Mt). Deliveries to the steel industry are forecast at 39.4 Mt, compared with 39.5 Mt supplied in 1994 and more than 39 Mt in 1992.

Intra-Community trade of coke is estimated at around 2 Mt but exhibits a downwards trend. On the other hand, coke imports from third countries are gradually rising in such a way that they could reach 4.5 Mt in 1995.

6. HARD COAL IMPORTS FROM THIRD COUNTRIES.

Imports of hard coal from third countries in 1994 rose by 1 Mt to 117.3 Mt. This increase was considerably smaller than had been expected in the previous report. This has been the logical consequence of the slight increase in demand for hard coal and the huge tonnages taken from the existing stocks, even though the cutback in Community coal production for the year was 27.2 Mt. By type of coal, there was a significant increase in the volume of steam coal qualities, whilst coking coal qualities saw a reduction.

HARD COAL IMPORTED FROM THIRD COUNTRIES

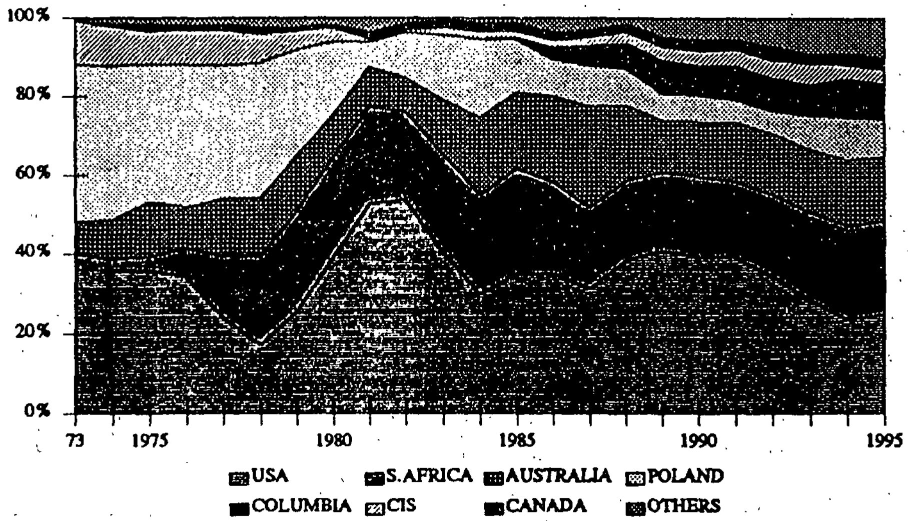


*Including new German Länder from 1991

By country, there are significant differences in the variations observed. The most marked increases were in the Netherlands (1.8 Mt), Italy (1.6 Mt), Germany (1.5 Mt) and Denmark (1.2 Mt). On the other hand, the largest decreases were seen in the United Kingdom (-3.3 Mt) and in France (-1.8 Mt). All other variations were lower than 1 Mt.

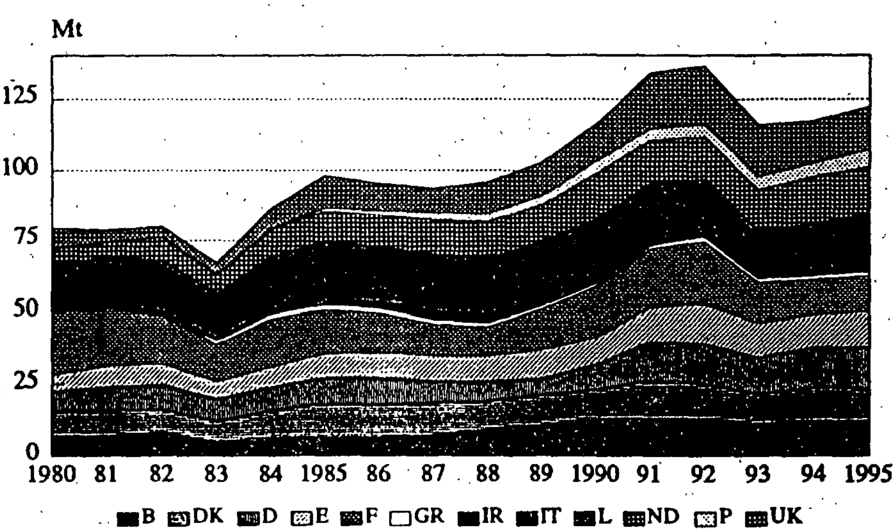
By suppliers, the most marked change in 1994 was that of the United States with a decrease of 4.4 Mt to 27.1 Mt. The United States lost its leading place as main coal supplier of the Community to South Africa. The CIS also lost market share. All the other main coal exporters saw an increase in the level of exports to the European Union during 1994 compared to 1993.

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 1995, forecasts point to an increase in imports, of about 5.0 Mt (4.3%) to 122.3 Mt. As deliveries are expected to increase only very slightly, this increase is accounted for by the anticipated slight cutbacks in production and a reduction in the amount taken from stocks, compared to 1994. By Member State, only Denmark forecasts a decrease in imports. All the other Member States foresee an increase in the level of their imports, being the most significant increases in Italy (1.8 Mt), and Portugal and Spain with 1.1 Mt each.

By suppliers, the United States will probably witness the largest rise, recovering its first place as coal exporter to the European Union, whilst Poland and Colombia could see a certain decrease.

6.1. Prices for imported coal

Coal prices for imported coal into the Community during 1994 and 1995 follow the same pattern as the world market. They started very depressed in 1994 and have moved upwards since the second quarter of 1994.

For steam coal qualities, contract prices in 1994, negotiated at the end of 1993, suffered cuts of about 2-3 $/tonne compared to the previous year. Despite that, these prices are still higher than the current spot prices.

The combination of a strong demand mainly in the Far East during 1994 and supply problems in Australia, South Africa, Russia and Colombia, firmed up the market. By the end of 1994, when contract prices for 1995 were negotiated, the FOB spot prices had gone up about 7-9 $/tonne in South Africa, 5-6 $/tonne in Colombia, 4-6 $/tonne in Australia, 2-3 $/tonne in USA and 6-7 $/tonne in Indonesia. In addition, the freight market picked up with an of another 3-4 $/tonne on average if different origins and vessel sizes are taken into account. All this tightened the market and resulted in a situation in which the majority of the coal for 1995 was committed under contract. Very little coal, especially of the higher qualities, was available in the spot market. With the sole exception of US coal, whose export prices have been falling during 1995 as a result of the low domestic demand in the USA, the supplies from other sources remains tight and the prices remain strong. In some cases, such as South Africa, the prices are even stronger than at the beginning of the year. This situation is expected to continue during the rest of the year and well into 1996, unless the demand weakens due to climatological reasons or a decrease in economic activity.

The average CIF price for Community steam coal imports from third countries for power stations in 1994, all countries all origins, in US dollars, decreased to 43.71 US dollars per tce (-2.5%) compared to the average price in 1993 of 44.81 US dollars per tce. Total imports of steam coal for use in public power stations totalled some 58.4 Mt compared to 55.9 Mt in 1993. The share under long term contracts accounted for some 72%, which was some 13 percentage points higher than in the previous year.

AVERAGE CIF PRICE FOR STEAM COAL IMPORTED FROM THIRD COUNTRIES ($/tce) *			
QUARTER	1993	1994	1995
I	46.96	43.31	47.97
II	45.92	42.68	
III	42.80	43.85	
IV	43.12	44.87	
Average	44.81	43.71	

* Imports for power stations

With respect to coking coal, 1994 began with a price cut of 4 US dollars per tonne FOB for Canadian coals in Japan and close to 4.5 US dollars per tonne FOB in Europe. The Australians followed suit in order not to lose market share, although with smaller reductions, of the order of 2.5 US dollars per tonne C&F in Europe. The US coals, on the other hand, were able to roll-over the FOB price in the case of the high and mid volatile coals or take a small cut of around 1 US dollars per tonne in the case of low volatile coals. The FOB prices from Poland were also reduced by around 2.5 US dollars per tonne.

The demand for coking coal increased during 1994 as a result of the good performance of the steel industry. This strong demand, coupled with a shortage of supply due to the closure of mines in the USA over the last 4 years of declining prices, resulted in a very tight market by the end of the year.

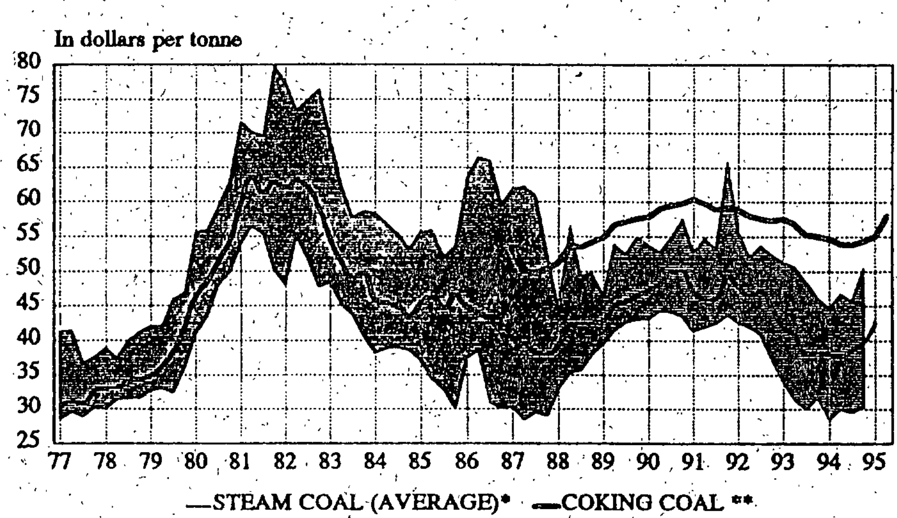
The contract prices for Fiscal Year 1995 experienced increases of close to 5 US dollars per tonne FOB on the US and Canadian Coals and over 5 US dollars per tonne FOB plus another 3 US dollars per tonne on the freight on the Australian coals. The increase in Polish coal was more or less of the same order. These increases, in one year, has reversed the decline of the last four years and have returned prices to their 1990/91 levels. During 1995 the coking coal market is likely to remain tight and to continue that way as long as steel production remains strong.

GUIDE CIF PRICE FOR COKING COAL IMPORTED FROM THIRD COUNTRIES ($/t)*			
QUARTER	1993	1994	1995
I	57.5	54.7	55.0
II	56.8	54.0	58.0
III	55.3	53.8	
IV	55.0	54.3	

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

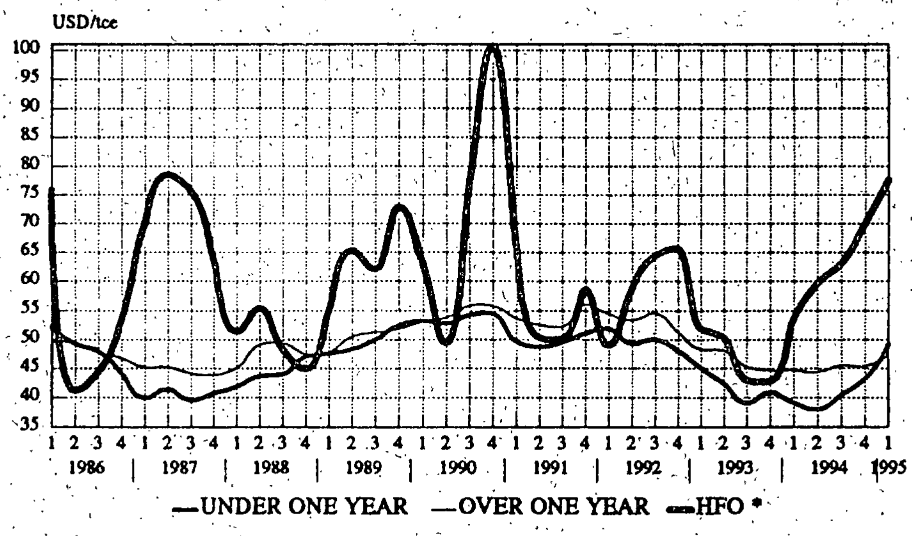
The Community guide price for coking coal imports from third countries started to climb from the third quarter of 1994, breaking the declining price trend in terms of US dollars that has existed since the first quarter of 1991.

AVERAGE CIF PRICES FOR HARD COAL IMPORTED FROM THIRD COUNTRIES



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

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



*Spot price Rotterdam; 3.5% sulphur

7. LIGNITE

During 1994, the lignite available in the market, including imports, was some 285.4 Mt, which is 16.1 Mt down on the 1993 figure. This was due mainly to the lower demand in Germany.

For 1995, total resources (production and imports) are expected to decrease again by 13.3 Mt to 272.1 Mt. Power stations are expected to consume some 222.1 Mt, which represents almost 82% of the available resources and which is roughly two percentage points higher compared to the previous year's figure. Decreases at the power stations are estimated at 8.5 Mt and at the briquetting plants at 5.8 Mt.

The expected drop in demand for lignite is likely to be the result of the fall in demand from the German briquetting plants and power stations. 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. Also, in other countries such as Spain, lignite is being partially substituted and increasingly blended with low sulphur sub-bituminous coals from third countries in order to diminish the sulphur emissions.

8. CONCLUSIONS.

The expected increase in the Community's GDP during 1995 is likely to lead to an increase in total energy demand, assuming normal weather conditions. However, solid fuels as a whole are likely to be the only primary energy source, which will remain unaffected and may, in fact, witness a significant decrease due to the falling Community demand, in terms of consumption, for lignite. This loss of market share is occurring, even though coal in the long term offers excellent guarantees for secure supplies in terms of its diversity, availability and price stability.

The revised forecasts for coal during 1995 do not introduce any significant changes compared to the trends and forecasts made at the beginning of the year. The percentage variations are, in general, less than 1% with the exception of coke. Most of the changes introduced are increases which improve very slightly the picture presented in the previous forecast.

Total deliveries of hard coal are expected to rise by only 0.6 Mt to 261.5 Mt during 1995, with respect to the 1994 figures. The main changes are likely to affect deliveries to the public power stations with an expected decrease of 1.2 Mt to 162 Mt and deliveries to the industry which could see a rise of 1.1 Mt to 25.1 Mt. Other variations are insignificant in absolute terms. Since stocks at the power stations are likely to decrease, the level of consumption may not differ much to that registered during 1994.

Community hard coal production will remain almost constant, since the decrease is only expected to be around 0.1 Mt to a new total of 131.4 Mt. The main changes are expected in the United Kingdom and in Germany. This stability is exceptional as production is expected to continue to decline over the coming years.

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 1995 compared to 1994. This is due to the improvements in the steel-making processes, which will continue to lead to a lower demand for coke into the future by unit of crude steel produced. Also imports of coke from third countries are expected to continue to smoothly increase.

The lignite market also is expected to decrease in 1995 as a result of the lower demand expected from the briquetting plants and power plants in Germany.

With respect to the international situation, the international coal market has witnessed a recovery in prices as a result of the tight balance between offer and demand for both steam and coking coals. The market is expected to remain tight for the rest of the year and well into 1996, unless demand weakens.

ANNEXES

TABLE 1

HARD COAL BALANCE SHEET FOR 1995

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem-bourg	Nether-lands	Austria	Portugal	Finland	Sweden	United Kingdom	EUR-15	EUR-12
1. PRODUCTION (t=t)			58910	17800	7610		3								47000	131323	131323
2 RECOVERIES	900		300		695						1 *				500	2396	2395
3 RECEIPTS FROM ECSC COUNTRIES	510	200	1500	300	150		344	13	85	500	6 *		150		500	4258	4102
4. IMPORTS FROM THIRD COUNTRIES	12390	10800	14650	12500	12250	1500	2485	17659	200	16750	2993 *	6098	7360	3260	15000	135895	122282
5. AVAILABILITIES (1+2+3+4)	13800	11000	75360	30600	20705	1500	2832	17672	285	17250	3000 *	6098	7510	3260	63000	269614	256000
6. TOTAL INLAND DELIVERIES	13040	11000	78250	30600	21690	1450	2812	17628	285	14550	3000	6098	7510	2962	64100	274975	261503
A.- POWER STATIONS AT MINES			1500		3500									80		5080	5000
B.- POWER STATIONS	6330	10300	50800	25650	4100	60	2102	7800		9000	600	4766	5000	870	41100	168478	162008
C.- COKING PLANTS	4500		14000	3500	7380			7195		4000		520		1600	9000	51695	50095
D.- IRON AND STEEL INDUSTRY	1000		1900		2500	90	1	1113	135	850	1900		1500	300	550	11839	8139
(of which POWER STATIONS)			*15*													15	15
E.- OTHER INDUSTRIES	750	700	8300	1000	3050	1293	204	1420	150	700	200	812	1000	92	6750	26421	25129
(of which POWER STATIONS)			*4200*		*350*										*2000*	6550	6550
F.- DOMESTIC HEATING	450		1150	350	900		504	50			298		10	20	4400	8132	7804
G.- MISCELLANEOUS (TOTAL 1 - 6)	10		600	100	260	7	1	50			2				2300	3330	3328
1. ISSUE TO WORKERS			*90*	*50*											*250*	*390*	*390*
2. PATENT FUEL PLANTS	*10*		*410*		*260*										*1300*	*1980*	*1980*
3. OWN CONSUMPTION AT MINES			*50*	*50*												*100*	*100*
4. GASWORKS																	
5. RAILWAYS			*20*			*1*					*2*					*23*	*21*
6. OTHERS			*30*			*6*	*1*	*50*							*750*	*837*	*837*
7. DELIVERIES TO ECSC COUNTRIES	750		1250		321 *		14			2700					900	5935	5935
8. EXPORTS TO THIRD COUNTRIES	25		50		109 *		6								100	290	290
9. TOTAL DELIVERIES (6+7+8)	13815	11000	79550	30600	22120	1450	2832	17628	285	17250	3000	6098	7510	2962	65100	275265	261793
10. MOVEMENT OF PRODUCERS' AND IMPORTERS STOCKS (5-9)	-15		-4190		-1415	50		44						298	-2100	-7328	-7626

* Commission estimates

TABLE 2

HARD COAL BALANCE SHEET FOR 1994

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Austria	Portugal	Finland	Sweden	United Kingdom	EUR-15	EUR-12
1. PRODUCTION (t=t)			57623	18185	7458		3					147			48030	131446	131446
2. RECOVERIES	753		310	32	571						1					1667	1666
3. RECEIPTS FROM ECSC COUNTRIES	572	228	1548	374	280		192	12	108	589	8	22	127		472	4530	4397
4. IMPORTS FROM THIRD COUNTRIES	12087	11544	14144	11397	12083	1400	2214	15889	206	16745	2993	4990	7943	3260	14569	131464	117258
5. AVAILABILITIES (1+2+3+4)	13412	11772	73625	29988	20392	1400	2409	15901	314	17334	3000	5159	8070	3260	63071	264577	250380
6. TOTAL INLAND DELIVERIES	12561	11772	78043	29949	21325	1436	2700	16369	314	14074	3164	5159	8078	2962	67239	275145	260941
A - POWER STATIONS AT MINES			1500		3274									80		4854	4774
B - POWER STATIONS	5673	11098	50309	24500	4100	84	2208	8660		8455	827	4098	5898	870	46154	170840	153255
C - COKING PLANTS	4444		13820	3942	7394			7435		4098		425		1600	8595	51751	50151
D - IRON AND STEEL INDUSTRY	1055		2170		2112	109		1054	158	851	2027		1172	300	552 *	11568	8069
(of which POWER STATIONS)			16													16	16
E - OTHER INDUSTRIES	863	706	8337	950	3095	1258	80	1110	158	869	204	668	1010	92	6149	25347	24041
(of which POWER STATIONS)			*4197*		*350*		*18*								*2041*	6606	6606
F - DOMESTIC HEATING	494		1212	360	1046		410	60		3	84		8	20	3878	7573	7461
G - MISCELLANEOUS (TOTAL 1 - 6)	22		695	197	304	7	2	50			22				1913	3212	3190
1. ISSUE TO WORKERS			*94*	*77*											*300* *	*471*	*471*
2. PATENT FUEL PLANTS	*22*		*470*		*300*										*1190*	*1982*	*1982*
3. OWN CONSUMPTION AT MINES			*50*	*120*											*22*	*192*	*192*
4. GASWORKS																	
5. RAILWAYS			*27*			*1*					*5*					*33*	*28*
6. OTHERS			*54*		*4*	*6*	*2*	*50*			*17*				*401*	*534*	*517*
7. DELIVERIES TO ECSC COUNTRIES	935	8	1123		410		2			3042					1113	6633	6633
8. EXPORTS TO THIRD COUNTRIES	38		41		140		4			39					95	355	355
9. TOTAL DELIVERIES (6+7+8)	13532	11780	79207	29949	21875	1436	2706	16369	314	17155	3164	5159	8078	2962	68447	275500	261296
10. MOVEMENT OF PRODUCERS' AND IMPORTERS STOCKS (5-9)	-120	-8	-5582	39	-1483	-36	-297	-468		179	-164		-8	298	-5376	-13026	-13152

* Commission estimates

TABLE 3

COKE BALANCE SHEET FOR 1995

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Austria	Portugal	Finland *	Sweden	United Kingdom	EUR-15	EUR-12
1. PRODUCTION (t=t)	3600		11100	2750	5690			4900		2900	1328 *	290			6100	38658	37330
2. RECEIPTS FROM ECSC COUNTRIES	65	10	200	100	400	10	24	23	1000	50	71 *	2	182		100	2237	1984
3. IMPORTS FROM THIRD COUNTRIES	1235	20	1250	550	240		6	230		350	536 *	37	223	200	600	5477	4518
4 TOTAL AVAILABILITIES (1+2+3)	4900	30	12550	3400	6330	10	30	5153	1000	3300	1935 *	329	405	200	6800	44135	41848
5. TOTAL INLAND DELIVERIES	4220	30	14125	3400	6335	15	30	5060	1000	2300	2000	332	405	200	6600	46052	43447
A.- STEEL INDUSTRY	4100		12270	3400	5500		19	4800	1000	2200	1440	260	405	200	5900	41494	39449
B.- OTHER INDUSTRIES	100	30	930		650	15	11	190		100	260	70			400	2756	2496
C.- DOMESTIC SECTOR	5		400		15			70			273				100	863	590
D.- MISCELLANEOUS of which :	15		525		170						27	2			200	939	912
1. ISSUE TO WORKERS	*5*		*280*		*60*											*345*	*345*
2. OWN CONSUMPTION			*3*													*3*	*3*
3. OTHERS	*10*		*242*		*110*						*27*	*2*			*200*	*591*	*564*
6. DELIVERIES TO ECSC COUNTRIES	675		230 *		303 *					1000						2208	2208
7. EXPORTS TO THIRD COUNTRIES	6		50 *		67 *			130							200	452	452
8. TOTAL DELIVERIES (5+6+7)	4900	30	14405	3400	6705	15	30	5190	1000	3300	2000	332	405	200	6800	46504	43899
9. STOCK MOVEMENT AT PRODUCTION & IMPORTS (4-8)			-1855		-375	-5		-37			-65	-3				-2340	-2275

* Commission estimates

22/8

TABLE 4

COKE BALANCE SHEET FOR 1994

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem-bourg	Nether-lands	Austria	Portugal	Finland	Sweden	United Kingdom	EUR-15	EUR-12
1. PRODUCTION (t=t)	3736		10919	3053	5880			5300		2886	1328	290			6202	39594	38266
2. RECEIPTS FROM ECSC COUNTRIES	65	13	204	48	614	8	8	43	995	79	71	2	182		65	2397	2144
3. IMPORTS FROM THIRD COUNTRIES	1238	26	1025	214	159	1	8	129		350	536	39	223	200	434	4582	3623
4. TOTAL AVAILABILITIES (1+2+3)	5039	39	12148	3315	6653	9	16	5472	995	3315	1935	331	405	200	6701	44176	41889
5. TOTAL INLAND DELIVERIES	4368	39	13716	3178	6339	15	16	5597	995	2282	2180	325	405	200	6638	46293	43505
A.- STEEL INDUSTRY	4256		11808	3178	5440		16	5350	995	2191	1328	256	405	200	6048	[illegible]	39536
B.- OTHER INDUSTRIES	91	39	933		877	15		160		91	258	67			347	[illegible]	2420
C.- DOMESTIC SECTOR	6		433		22			87			567	-			158	1273	706
D.- MISCELLANEOUS of which :	15		542		200						27	2			85	571	844
1. ISSUE TO WORKERS	*4*		*296*		*80*											*380*	*380*
2. OWN CONSUMPTION	*1*		*3*													*4*	*4*
3. OTHERS	*10*		*243*		*120*						*27*	*2*			*85*	*487*	*460*
6. DELIVERIES TO ECSC COUNTRIES	680		372		352					982					2	2388	2388
7. EXPORTS TO THIRD COUNTRIES	5		44		78			140		4					283	554	554
8. TOTAL DELIVERIES (5+6+7)	5053	39	14132	3178	6769	15	16	5737	995	3268	2180	325	405	200	6923	46847	44062
9. STOCK MOVEMENT AT PRODUCTION & IMPORTS (4-8)	-14		-1800	137	-116	-6		-265		47	-245	6			-222	-2478	-2233

22/8

TABLE 5

LIGNITE AND PEAT BALANCE SHEET FOR 1995

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem-bourg	Nether-lands	Austria	Portugal	Finland	Sweden	United Kingdom	EUR-15	EUR-12
A. RAW PRODUCT																	
- AVAILABILITIES :	**200**		**196190**	**10000**	**1590**	**58000**	**5385**	**595**	**9**	**100**	**1319 ***		**9110**			**282498**	**272069**
PRODUCTION			193790	10000	1550	58000	5325	580			1300		9100			279645	269245
IMPORTS	200		2400		40		60	15	9	100	19 *		10			2853	2824
- UTILIZATION :	**200**		**196190**	**10000**	**1285**	**58000**	**5385**	**595**	**9**	**100**	**1000**		**6748**			**279612**	**271764**
BRIQUETTING PLANTS			32480			100	788			50	100					33518	33418
POWER STATIONS			150000	10000	1110	57380	3035	580			850		6062			229017	222105
OTHERS	200		13710		175	520	1562	15	9	50	50		686			16977	16241
B. BRIQUETTES																	
- AVAILABILITIES :	**15**	**5**	**10102**			**107**	**8**		**7**		**181 ***					**10425**	**10244**
PRODUCTION			9752			107										9859	9859
ARRIVAL FROM ECSC COUNTRIES	15	5					8		7		179 *					214	35
IMPORTS FROM THIRD COUNTRIES			350								2 *					352	350
- UTILIZATION	**15**	**5**	**10102**			**107**	**8**		**7**		**152**					**10396**	**10244**
POWER STATIONS			200			67					10					277	267
INDUSTRY			3660								20					3680	3660
DOMESTIC	15	5	5000				5		7		120					5152	5032
SHIPMENTS TO OTHER																	
ECSC COUNTRIES			490				3									493	493
EXPORTS TO NON-MEMBER																	
COUNTRIES			210													210	210
- OTHERS			542			40					2					584	582

* Commission estimates

22/8

TABLE 6

LIGNITE AND PEAT BALANCE SHEET FOR 1994

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Austria	Portugal	Finland	Sweden	United Kingdom	EUR-15	EUR-12
A. RAW PRODUCT																	
- AVAILABILITIES :	**213**		**209493**	**11362**	**1584**	**56672**	**5428**	**553**	**9**	**69**	**1389**		**9110**			**296882**	**286383**
PRODUCTION			207077	11362	1501	56672	5378	537			1370		9100			292997	282527
IMPORTS	213		2416		83		50	16	9	69	19		10			2885	2856
- UTILIZATION :	**213**		**209452**	**11350**	**1286**	**57973**	**5599**	**582**	**9**	**71**	**1233**		**6748**			**294516**	**286535**
BRIQUETTING PLANTS			38073			124	954			32	140					39323	39183
POWER STATIONS			157234	11350	1101	57339	3000	560			985		6062			237531	[illegible]
OTHERS	213		14145		185	510	1645	22	9	39	108		686			17562	[illegible]

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Austria	Portugal	Finland	Sweden	United Kingdom	EUR-15	EUR-12
B. BRIQUETTES																	
- AVAILABILITIES :	**14**	**5**	**11481**			**107**	**6**		**7**		**181**					**11801**	**11620**
PRODUCTION			11131			107										11238	11238
ARRIVAL FROM ECSC COUNTRIES	14	5					4		7		179					209	30
IMPORTS FROM THIRD COUNTRIES			350				2				2					354	352
- UTILIZATION	**14**	**5**	**11491**			**109**	**6**		**7**		**181**					**11813**	**11632**
POWER STATIONS			256			69					10					335	325
INDUSTRY			3815								22					3837	3815
DOMESTIC	13	5	5402				1		7		147					5575	5428
SHIPMENTS TO OTHER																	
ECSC COUNTRIES	1		493				5									499	499
EXPORTS TO NON-MEMBER																	
COUNTRIES			217													217	217
- OTHERS			1308			40					2					1350	1348

22/8

24

TABLE 7A

HARD COAL PRODUCTION BY AREA

22/8/95 (In thousands of metric tons)

	1993	1994	1995
Ruhr	51474	45357	47000
Aachen	1560	1575	1580
Ibbenburen	2066	2015	1730
Saar+Kleinzechen	9075	8676	8600
GERMANY	**64175**	**57623**	**58910**
Central Asturias	3714	3524	3470
Bierzo-Villablino + Narcea	6359	6561	6350
Norte Leon + Palencia	2176	2008	1920
Sur	1802	1954	1930
Aragon-Cataluña, Baleares	4132	4138	4130
SPAIN	**18183**	**18185**	**17800**
Lorraine	7412	6347	6450
Centre-Midi	1164	1111	1160
FRANCE	**8576**	**7458**	**7610**
IRELAND	**1**	**3**	**3**
Sulcis (Sardinia)	20		
ITALY	**20**		
PORTUGAL	**197**	**147**	
Scotland			
North-East			
Yorkshire			
Nottinghamshire			
Midlands			
BC Opencast	14414		
Licensed mines + Opencast	3663		
UNITED KINGDOM	**67463**	**48030**	**47000**
EUR 15	**158615**	**131446**	**131323**

TABLE 7B

LIGNITE AND PEAT PRODUCTION BY AREA

22/8/95 (In thousands of metric tons)

	1993	1994	1995
GKB		1190	1200
WTK		180	100
AUSTRIA		**1370**	**1300**
Rheinland	102100	101362	100700
Helmstedt	3900	3774	3800
Hessen	100	150	150
Bayern	100	51	50
Lausitz	87400	79410	71615
Mitteldeutschland	28200	22330	17475
GERMANY	**221800**	**207077**	**193790**
Ptolemais	31800	35000	36800
Megalopolis	11800	12500	12500
Amindeo	7600	7000	7000
Others	3600	2172	1700
GREECE	**54800**	**56672**	**58000**
La Coruña	13347	11362	10000
SPAIN	**13347**	**11362**	**10000**
Centre-Midi	1671	1501	1550
FRANCE	**1671**	**1501**	**1550**
IRELAND	**5827**	**5082**	**5325**
Valdarno	1000	537	580
ITALY	**1000**	**537**	**580**
FINLAND		**9100**	**9100**
EUR 15	**298445**	**292701**	**279645**

EUR 12	**298445**	**282231**	**269245**

TABLE 8

COAL IMPORTS FROM THIRD COUNTRIES

(In thousands of metric tons)

1994	U.S.A	Canada	Australia	South Africa	Poland	CIS	China	Colombia	Others	Total Imports
Belgium	3648	240	2637	4200	309	359	331	238	125	12087
Denmark	394	312	1040	3276	3805	1103		1231	383	11544
Germany	584	12	746	4990	3361	148		1085	3218	14144
Spain	3790	448	1007	4310	120	65		1030	627	11397
France	3218	47	2977	1731	828	323	800	960	1199	12083
Greece				780	39	211	60	116	194	1400
Ireland	662			270	521	53	3	10	695	2214
Italy	6647	1262	2673	2753	336	1101	296	336	485	15889
Luxembourg				206						206
Netherlands	3993	226	4316	1810	970	65	207	2405	2753	16745
Austria					998	30			1965	2993
Portugal	1036	219	202	2116	258	141		840	178	4990
Finland	351		71	390	4779	1841		128	383	7943
Sweden	815		489		1141	652			163	3260
UK	3167	830	3994	706	1961	429	77	2963	442	14569
EUR-15	28305	3596	20152	27538	19426	6521	1774	11342	12810	131464
EUR-12	27139	3596	19592	27148	12508	3998	1774	11214	10299	117268

(In thousands of metric tons)

1995	U.S.A	Canada	Australia	South Africa	Poland	CIS	China	Colombia	Others	Total Imports
Belgium	3840	220	2420	4575	340	245	400	220	130	12390
Denmark	500	300	1000	3200	3500	1100		1200		10800
Germany	605 *	12 *	773 *	5169 *	3481 *	153 *		1124 *	3333 *	14650
Spain	3900	500	1000	4500		600		1000	1000	12500
France	3300	400	2900	1800	850	300	900	1000	800	12250
Greece				780	39	211	60	116	294	1500
Ireland	743 *			303 *	585 *	59 *	3 *	11 *	780 *	2485
Italy	7727	844	3183	3332	300	1123	600	300	250	17659
Luxembourg				200						200
Netherlands	4000	200	4430	1650	900	70	130	2500	2870	16750
Austria					998 *	30 *			1965 *	2993 *
Portugal	1437	220	434	2148	190	210		1116	343	6098
Finland	325 *		66 *	361 *	4428 *	1706 *		119 *	355 *	7360
Sweden	815		489		1141	652			163	3260
UK	3593	530	3440	654	1434	735	142	2055	2417	15000
EUR-15	30785	3226	20135	28672	18186	7195	2235	10761	14700	135895
EUR-12	29645	3226	19580	28311	11619	4807	2235	10642	12217	122282

* Commission estimates

TABLE 9

INTRA-COMMUNITY TRADE OF COAL IN 1995

(In thousands of metric tons)

To / From --->	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem-bourg	Nether-lands	Austria	Portugal	Finland	Sweden	United Kingdom	Total deliveries / Total receipts
Belgium			549 *		2 *					300						851
			410		5					35					60	510
Denmark															200	200
															200	200
Germany	165				260 *					2000					200	2625
	426 *				233 *					752 *					89 *	1500
Spain	5				6 *											11
			50							250						300
France	320		194 *				14 *			300					100	928
			90												60	150
Greece																
Ireland			1		27 *										400	428
	5 *	2 *	11 *		88 *					13 *					228 *	344
Italy	5		11 *		7 *											23
	8		1		4											13
Luxembourg	50		71 *													121
	50		15							20						85
Netherlands	200		208 *													408
	300		160												40	500
Austria			3 *		2 *											6
			3		3											6
Portugal					2 *											2
Finland																
Sweden																
United Kingdom	5		213 *		15 *					100			150 *			482
	50		200		25		25			200						500
Total deliveries	750		1250		321 *		14			2700			150		900	6085
Total receipts	840	2	890		357		25			1019					675	4108

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

* Commission estimates

TABLE 10

INTRA-COMMUNITY TRADE OF COAL IN 1994

(In thousands of metric tons)

To / From →	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem-bourg	Nether-lands	Austria	Portugal	Finland	Sweden	United Kingdom	Total deliveries / Total receipts
Belgium			493		3					350					66	912
			445		4					60					63	572
Denmark															214	214
															228	228
Germany	269				332					2176					133	2930
	440				240					776					92	1548
Spain	8				8					64					36	116
	30	1	55		11					214					63	374
France	355		174				2			253					103	887
			168												112	280
Greece																
Ireland		5	1		34					5					273	318
	3	1	6		49					7					126	192
Italy	7		10		9					1						27
	8		1		3											12
Luxembourg	57		64													121
	57		1							28					22	108
Netherlands	207	3	187												147	544
	298		240		3									5	43	589
Austria			3		3											6
			3		3											6
Portugal					2					2						4
				22												22
Finland	4														127	131
Sweden															14	14
United Kingdom	8		191		19					191			127			536
	5		191		14		32	6		224						472
Total deliveries	935	8	1123		410		2			3042			127		1113	6760
Total receipts	811	1	1055	22	316		32	6		1095				5	686	4403

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

* Commission estimates

TABLE 11

INTRA-COMMUNITY TRADE OF COKE IN 1995

(In thousands of metric tons)

To / From →	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Austria	Portugal	Finland	Sweden	United Kingdom	Total deliveries / Total receipts
Belgium			12 *		51 *					200			8 *			269
					60					5						65
Denmark					1 *											1
			1 *							4 *					5 *	10 *
Germany	100				54 *					100			4 *			258
	135 *				49 *					16 *						200
Spain					15 *					50						65
	10		5		50			10				5		20		100
France	100		6 *							500			38 *			644
	40									360						400
Greece			1 *													1
								10 *								10
Ireland																
	10 *		6 *							5 *					3 *	24
Italy			11 *		57 *								2 *			70
					23											23
Luxembourg	395		130 *													525
	340		420							240						1000
Netherlands	25		51 *		10 *								104 *			191
			50													50
Austria			19 *		7 *											25
																71 +
Portugal																
				2												2
Finland	5				35 *					100						140
Sweden	50				42 *								25 *			117
United Kingdom					30 *					50			2 *			82
				10	50					40						100
Total deliveries	675		230		303 *					1000			181			2389
Total receipts	525		477	12	182			10		670					8	2055

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

*** Commission estimates; + breakdown by Member State not available**

TABLE 12

INTRA-COMMUNITY TRADE OF COKE IN 1994

(In thousands of metric tons)

(In thousands of metric tons)

To / From →	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem-bourg	Nether-lands	Austria	Portugal	Finland	Sweden	United Kingdom	Total deliveries / Total receipts
Belgium			20		59					218			6			303
			1		60					4						65
Denmark	1				1										1	3
	*		1 *					*		5 *					7 *	13 *
Germany	112				63					66			4			245
	136				51					17						204
Spain					18											18
	5		1		20			6				1			15	48
France	93		10							539			38			680
	70									544						614
Greece	1		1													2
								8 *								8
Ireland																
	3 *		2 *							2 *					1 *	8
Italy	2		18		66								2			88
			1		42											43
Luxembourg	393		210													603
	358		377							260						995
Netherlands	25		83		12								104		1	225
	10		58		11											79
Austria	1		30		8											39
																71 +
Portugal																
				2												2
Finland	6				41					86						133
Sweden	46				49					23			25			143
United Kingdom					35					50			2			87
	4			11	32					18						65
Total deliveries	680		372		352					982			181		2	2569
Total receipts	581		440	13	196			8		850					8	2215

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

* Commission estimates; + breakdown by Member State not available

151

TABLE 13

STOCKS

(In millions of metric tons)

	Producers (Hard coal)			Power Stations (Hard coal)			Coking plants (Coke)			Coking plants (Hard coal)		
	1993 Actual	1994 Estimate	1995 Forecast	1993 Actual	1994 Estimate	1995 Forecast	1993 Actual	1994 Estimate	1995 Forecast	1993 Actual	1994 Estimate	1995 Forecast
Belgium	0.0	0.0	n.a.	0.6	0.6	0.6	0.1	0.0	0.0	0.4	0.4	0.4
Denmark				6.9	5.6	n.a.						
Germany	20.2	14.0	10.1	13.3	13.3	13.5	5.0	3.0	1.3	0.3	0.2	0.3
Spain	1.1	1.0	1.1	9.2	8.0	9.1	0.2	0.0	n.a.	0.6	0.5	0.5
France	2.2	1.3	2.1	7.4	6.1	5.9	0.4	0.3	n.a.	0.9	0.9	0.9
Greece							0.0	0.0	n.a.			
Ireland	0.0	0.0	n.a.	0.5	0.2	n.a.						
Italy				1.1	0.4	n.a.	0.2	0.2	n.a.	0.9	0.9	n.a.
Luxembourg												
Netherlands				1.8	1.8 +	n.a.	0.1	0.1	n.a.	0.5	0.5	n.a
Portugal	0.0		n.a.	0.6	0.7	1.3	0.0	0.0	0.0	0.0	0.1	0.1
United Kingdom	15.5 *	11.3 *	10.9 *	28.6	14.1	n.a.	0.7	0.6	n.a.	1.2	1.1	
EUR-12	39.0	27.6	24.1	69.9	50.8	n.a.	6.7	4.4	n.a.	4.9	4.5	n.a.

*. Excluding low grade; + Commission estimate

TABLE 14

PERSONNEL EMPLOYED UNDERGROUND
(yearly average)

(in thousands)

	1993 Actual	1994 Estimates	1995 Forecasts
Belgium	0.3	0.1	0.0 *
Germany	71.8	64.7	61.0
Spain	25.0	26.4	24.6
France	7.0	6.6	6.3
Portugal	0.4	0.4 *	0.0 *
United Kingdom	21.0	11.2 *	11.0 *
Ireland	0.0	0.0	0.0
EUR-12	125.5	109.4 *	102.9 *

* Commission estimates

TABLE 15

OUTPUT PER MAN/HOUR UNDERGROUND

(Kg per man/hour)

	1993 Actual	1994 Estimates	1995 Forecasts
Germany	707	714	735
Spain	392	423	438 *
France	711	654	698
Portugal	na	na	na
United Kingdom	1239	1422	2000 *
EUR-12	762	757 *	816 *

* Commission estimates

22/8