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REVISED FORECASTS FOR THE OUTLOOK
FOR THE COMMUNITY SOLID FUELS MARKET IN 1984

(Communication of the Commission)

REVISED FORECASTS FOR THE OUTLOOK

FOR THE COMMUNITY SOLID FUELS MARKET IN 1984

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I - INTRODUCTION AND SUMMARY

□□ Strike in British coalfields

A) Introduction

1. This document follows on from the report on the Community coal market in 1983 and the outlook for 1984, which was compiled at the beginning of this year (1).

These initial forecasts have been very much brought into question as a result of the miners' strike which began in Great Britain on 12 March 1984.

2. In order, nevertheless, to bring out current market trends, the working solution has been adopted of analysing developments in the nine other countries of the Community by reference to the provisional figures for 1983 and the initial forecasts for 1984 which concern them. With this in view, the attached tables include a column headed "Community without United Kingdom" (2).

A separate column shows the statistics available for that country at the time of going to press. To understand the situation, it should be borne in mind that its normal level of coal production represents about half that of the Community as a whole ; its consumption, more than a third ; its contribution to intra-Community and world trade is similarly significant.

3. All these factors will be affected in 1984, and this will result in corresponding changes in the Community's overall situation, even if various measures succeed in lessening the consequences of the strike on coal consumption.

B) Summary

4. The table below shows the trend of supply and demand in the Community at the time of writing this report.

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(1) OJ No C 154 of 18.6.1984.

(2) The chapters, sections and revised tables keep the same numbering as in the basic report.

EUR-10 (millions of tonnes)

	1982	1983 EUR-10	1983 without UK	1984 without UK
Availabilities				
Production	241.2	229.3	112.8	106.9
Recoveries	7.0	6.0	3.2	3.1
Imports	72.1	61.5	57.8	69.6
Total	320.3	296.8	173.8	179.6
Deliveries				
To the Community	312.0	293.6	178.1	186.7
Exports	2.8	3.9	2.0	1.3
Total	314.8	297.5	180.1	188.0

5. This table brings out a slight increase in availabilities, resulting from a decrease in production and an upswing in imports.

Demand has recovered some of the ground lost in 1983 compared to 1982, thus sharing in the increase in energy demand in 1984 which has accompanied the improvement in the general economic situation.

Developments in the various sectors have been as follows :

- steel : increased consumption
- power stations : greater use of coal in French power stations
- other sectors : the upward trend is confirmed
- international trade : upswing in imports
- stocks : marked reduction

Tables 31 A and B and 32 A and B give details by country and sector of supply and demand for coal and coke for 1983 and 1984.

6. Coal prices for Community coalfields are on a slight increase ; the substantial fall in dollar prices of imported coal seems to have slowed down ; developments in the near future will depend on several factors.

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II - GENERAL ECONOMIC SITUATION AND OUTLOOK

■■ Moderate upswing - but unemployment remains high

7. The recovery in economic activity in the Community, which began in 1983, continued throughout 1984 although the overall rate of expansion of real gross domestic product remained modest, at just over 2 %, as a result of the effects of adjustment policies in certain countries. In addition industrial production was adversely affected in the first half of the year by labour disputes in both Germany and the United Kingdom. Most of the growth in GDP was attributable to domestic demand, as the continued expansion of private consumption was re-inforced by a recovery in fixed investment, particularly in equipment. The buoyancy of world trade enabled exports to expand rapidly whilst the growth of imports remained moderate despite the increase in domestic demand.

8. The rate of growth is not expected to be sufficient to prevent a further rise in unemployment to average 11.1 % for 1984 as a whole. However, the expected deceleration in the growth of unit labour costs should contribute to further reducing the rate of inflation, with the deflator of private consumption falling from 6.3 % in 1983 to 5.1 % in 1984. In addition, the current account of the balance of payments for the Community as a whole is likely to show a surplus of around US $ 9 billion (equivalent to 0.4 % of GDP).

III - COAL DEMAND BY SECTOR

1. Steel

■■ Increase in coke consumption

9. Community steel production reached 61 million tonnes in the first two quarters of 1984. It should reach 115 to 118 million tonnes for the year as a whole. This figure exceeds the forecast made at the beginning of the year by 3 million tonnes and the final results for 1983 (109 million tonnes) by at least 6 million tonnes.

In these circumstances, coke consumption should be in the region of 45 million tonnes in 1984, as against 43 million tonnes in 1983.

The strike in the German metal-using industries was not followed by a fall in production in the pig-iron and steel industries.

For the first months of 1984, steel production in Great Britain reached million tonnes, as against million tonnes in the corresponding period of 1983.

2. Power stations

More hard coal for French power stations

10. Community electricity consumption should increase by 2.2 % in 1984, as in 1983.

The shares of the various fuels have up till now been in line with the beginning-of-the-year estimates, except in France, where deliveries of hard coal to power stations should reach approximately 23 million tonnes instead of the 15 previously forecast ; the surplus should allow for 1 to 1.5 million tonnes of restocking.

For the Community without the United Kingdom, deliveries to colliery and publicly owned power stations should reach 98 million tonnes in 1984 as against 91.5 in 1983.

11. In the United Kingdom the miners' strike has led both to use of the very sizeable hard coal stocks hold at power stations and to the increased use of nuclear, fuel oil and natural gas.

Deliveries of hard coal to United Kingdom power stations for the first months of 1984 reached million tonnes as against million tonnes for the same period in the previous year.

4. Other sectors

Upward trend confirmed

12. Hard coal deliveries for the Community without the United Kingdom may be compared as follows :

(millions of tonnes)

	1983 Actual	1984 Initial Estimates	1984 Revised
Other industries(*)	16.3	18.6	18.7
Domestic	5.9	5.9	6.2
Patent fuel	2.6	2.4	1.5
Total	24.8	26.9	26.4

(*) These deliveries include those made to own electricity producers

IV - COMMUNITY COAL PRODUCTION

Adjustment in three countries

1. Production statistics

13. 1984 production levels for Belgium, Germany and France should total 107 million tonnes as against 113 for the previous year. Even so, the figure for Germany will exceed the beginning-of-the-year estimate by about 1 million tonnes.

United Kingdom production for the first months of 1984 reached million tonnes as against million tonnes for the same period in 1983.

V - COAL PRICES

1. Changes in listed prices for Community coal

Costs pull up prices

14. The price increases made by Community producers in the course of the first quarter of 1984 because of increased production costs may be summarized as follows :

Belgium : 2 - 7 % for hard coal, except coking coal ;
France : 2 - 20 % for coal and 4 - 12 % for coke :
Germany : 2 - 17 % (exceptionally) for coal,
2 - 4 % for coke ;
Great Britain : foundry coke only was increased by 10 %.

2. Changes in the price of imported coal

Competition affects prices

15. a) Current and forecast factors

The fall in average prices cif ARA calculated for the Community continued throughout the first quarter of 1984. However, since the beginning of the year the lowest prices have shown an upward trend of 3 - 5 $/t, in particular on the spot market.

Developments in world prices in the near future are difficult to forecast, in view of the various different scenarios to which the following factors could give rise :

- future demand, taking account of the precautionary purchases made in the first half of 1984 in anticipation of the expected US miners' strike ;
- future supply, as conditioned by the duration and effects of miners' strikes in Great Britain and possibly in the United States ;
- diversification of supply by the bringing into production or the development of new hard coal mines to compensate for limitations on supply from other production sites ;
- the wish of the majority of sellers to lessen in their favour the existing imbalance between low fob revenue and higher fob costs ;
- changes in exchange rates.

b) Recent changes

16. Coking coal

Guide price, cif ARA, standard quality

(per metric tonne)

Reference date	US $	DM	FB	FF	£
1.4.1983	68.95	167	3 325	502	47
1.7.1983	67.05	170	3 406	511	44
1.10.1983	65.95	173	3 511	526	44
1.1.1984	66.20	181	3 691	553	47
1.4.1984	65.00	168	3 440	518	45

17. Steam coal

Average price cif ARA of steam coal imported from non-member countries

(per metric t as received)

Reference date	US $	DM	FB	FF	£
2nd quarter 1983	51.30	125	2 470	373	35
3rd quarter 1983	49.00	124	2 490	373	32
4th quarter 1983	49.80	130	2 651	397	33
1st quarter 1984	45.80	125	2 554	382	33

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3. Miscellaneous comparisons

18. a) A comparison of prices for imported coking coal and steam coal shows a widening of the gap in favour of steam coal by US $ 7.15 (- 11 %) in the second quarter of 1983 to US $ 10.40 (- 17 %) in the first quarter of 1984 (price per tonne at 29.3 GJ).

b) Compared with cif ARA prices for imported coking coal and steam coal imported in the first quarter of 1984, list prices for Community coal show the following differentials :

(per tonne at 29.3 GJ)

	Coking coal	Steam coal
Ruhr	+ 26.50 $	+ 34 $
Lorraine	+ 13 $	+ 39 $
North Yorkshire	+ 27 $	+ 26 $

c) For both varieties of coal, it is striking that the fall in dollar prices has been accompanied by sustained price levels in European national currencies. This is the result of the continuing appreciation of the dollar during the period under review.

VII - TRADE IN COAL AND COKE

1. Intra-Community Trade

Uncertainty over the British contribution

19. Initially, this trade had been estimated at 16 million tonnes of hard coal and 4.3 million tonnes of coke for 1984, much the same as for 1983. These figures include deliveries of British hard coal estimated at 5 million tonnes.

For the first months of 1984, these deliveries reached million tonnes : amounts of coke taken by the United Kingdom, which are usually negligible, reached million tonnes.

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2. Trade with third countries (Revised Table 27 A)

-- Upswing in imports

20. For the Community without the United Kingdom, latest figures show imports from third countries of about 70 million tonnes, compared with an initial estimate of 59 million tonnes and a final figure for 1983 of 57 million tonnes. The difference is mainly due to an increase by 8 million tonnes of imports estimated for France, in particular for electricity generation.

Part of the demand is intended to lessen the effects of a possible strike in the United States coalfields.

Imports to Great Britain reached million tonnes in the first months of 1984, as against million tonnes for the same period in 1983.

VIII - HARD COAL AND COKE STOCKS (Revised Table 28 A)

-- Marked reduction

21. For the whole of the Community without Great Britain, producers' stocks fell at the rate estimated at the beginning of the year :

(million tonnes)

	End 1983	End 1984
Hard coal	19.1	16.8
Coke	11.2	9.1
(without German national reserves)		

Changes in the level of power station hard coal stocks will mainly depend on movements between now and the end of the year in Great Britain, where power station stocks stood at 28 million tonnes at the end of 1983.

TABLE 27 A

Importsof hard coal from third countries in 1984

('000 tonnes)

	B.	DK.	D.	F.	H.	Irl.	It.	L.	NL	Total without U.K.	U.K.	EUR-10
U S A	2 665	500	1 850	3 600	1 100	270	6 980	5	4 500	21 470	NOT	
CANADA	-	300	1 000	700	-	-	120	-	160	2 280	AVAILABLE	
AUSTRALIA	245	500	450	5 700	-	-	2 280	-	1 950	11 125		
SOUTH AFRICA	2 050	3 000	2 600	4 800	100	20	4 800	140	200	17 710		
POLAND	565	3 450	2 200	2 300	-	796	2 420	-	1 200	12 931		
U S S R	190	250	100	300	50	-	300	-	-	1 190		
Others and unidentified	135	-	300	2 050	-	97	100	-	240	2 922		
Total 1984	5 850	8 000	8 500	19 450	1 250	1 183	17 000	145	8 250	69 628		
Earlier forecast 1984	5 450	7 550	7 700	11 400	1 145	1 095	16 570	130	7 930	58 970	4 200	63 170
Actual 1983	5 063	6 832	7 939	12 907	1 109	903	15 784	119	6 422	57 078	3 701	60 779

TABLE 28 A

Producers' stocks of hard coal and coke

('000 tonnes)

End :	1983 Actual	1984 Forecasts January 1984	1984 Revised Forecasts
1. Coal			
Belgique	851	801	696
Deutschland (1)	13 408	11 684	11 908
France	4 807	4 715	4 127
Ireland	30	120	30
Total	19 096	17 320	16 761
United Kingdom	24 493	25 584	N.D.
EUR-10	43 589	42 904	N.D.
2. Coke			
Belgique	114	100	114
Deutschland (1)	9 462	7 809	7 612
France	816	800	466
Hellas	40	30	75
Italia	785	800	785
Nederland	17	17	17
Total	11 234	9 556	9 069
United Kingdom	1 343	1 473	N.D.
EUR-10	12 577	11 029	N.D.

(1) Excluding the national reserve of 7 231 hard coal and 2 977 coke.

TABLE 31 A Coal balance sheet for 1983 (Provisional figures at 15 July 1984) ('000 t)

	Belgique	Danmark	Deutschl.	France	Hellas	Ireland	Italia	Lux.	Nederl.	Total without U.K.	U.K.	EUR-10
1. Production (t = t)	6 098	-	(1) 89 620	17 022	-	75	-	-	-	112 815	116 448	229 263
2. Recoveries	1 245	-	296	1 652	-	-	-	-	-	3 193	2 806	5 999
3. Arrivals from ECSC countries	2 474	1 657	1 574	5 665	-	521	1 997	46	1 362	(15 296)	661	(15 957)
4. Imports from non-member countries	5 036	7 257	7 941	12 907	1 420	905	15 795	122	6 422	57 805	3 701	61 506
5. Availabilities (1+2+3+4)	14 853	8 914	99 431	37 246	1 420	1 501	17 792	168	7 784	173 813	123 616	296 768
6. Internal deliveries	(2)	(2)	(2)	(2)	(2)	(3)	(3)	(2)	(3)		(3)	
a) colliery power stations	370	-	3 144	7 420	-	-	-	-	-	10 934	220	11 154
b) public power stations	5 445	8 435	43 312	12 210	243	68	6 859	-	4 150	80 722	85 000	165 722
c) coke ovens	6 070	-	29 709	10 629	-	-	8 740	-	2 968	58 116	11 679	69 795
d) steel industry	32	-	770	729	82	-	-	74	3	1 690	..	1 690
(of which power stations)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)
e) other industries	871	344	8 763	2 810	918	312	1 800	90	373	16 281	7 193	23 474
(of which power stations)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(..)	(-)
f) domestic sector	1 123	246	748	2 123	3	1 140	160	4	70	5 617	9 647	15 264
e) miscellaneous (total)	76	41	2 994	1 630	15	-	32	-	-	4 788	1 728	6 516
of which : 1. issues to workers	(27)	(-)	(158)	(71)	(-)	(-)	(-)	(-)	(-)	(256)	(-)	(256)
2. patent fuel	(43)	(-)	(1 233)	(1 313)	(-)	(-)	(-)	(-)	(-)	(2 589)	(917)	(3 506)
3. own consumption	(6)	(-)	(333)	(240)	(-)	(-)	(-)	(-)	(-)	(579)	(446)	(1 025)
4. gasworks	(-)	(41)	(-)	(-)	(14)	(-)	(-)	(-)	(-)	(55)	(14)	(69)
5. railways	(-)	(-)	(38)	(6)	([illegible])	(-)	(-)	(-)	(-)	(45)	(23)	(68)
6. others	(-)	(-)	(1 232)	(..)	(-)	(-)	(32)	(-)	(-)	(1 264)	(328)	(1 592)
7. Total internal deliveries (6)	13 987	9 066	89 440	37 551	1 261	1 520	17 591	168	7 564	178 148	115 467	293 615
8. Deliveries to ECSC countries	664	-	8 771	422	-	5	-	-	638	(10 500)	4 434	(14 934)
9. Exports to non-member countries	114	-	1 548	134	-	-	-	-	196	1 992	1 898*	3 890
10. Total deliveries (7+8+9)	14 765	9 066	99 759	38 107	1 261	1 525	17 591	168	8 398	180 140	121 799	297 505
11. Movement of producers' and importers' stocks (5 to 10)	+ 157	+ 30	- 722	- 132	+ [illegible]	+ 29	- 278	-	- 40	- 847	+ 1 851	+ 1 004
12. Statistical difference	- 69	- 182	+ 594	- 729	- [illegible]	- 53	+ 479	-	- 574	- 684	- 34	- 718
13. Difference between totals (3 - 8)	-	-	-	-	-	-	-	-	-	- 6 327		- 1 023

(1) National series : 81 653

TABLE 31 B Coal balance sheet for 1984 (Revised in July 1984)

('000 t)

	Belgique	Danmark	Deutschl.	France	Hellas	Ireland	Italia	Lux.	Nederl.	Total without U.K.	U.K.	EUR-10
1. Production (t = t)	5 985	-	84 920	15 920	-	60	-	-	-	106 885	..	..
2. Recoveries	1 350	-	230	1 530	-	-	-	-	-	3 110	NOT	
3. Arrivals from ECSC countries	2 495	1 300	1 500	6 000	750	372	2 000	34	1 200	(15 651)(2)	AVAILABLE	
4. Imports from non-member countries	5 850	8 000	8 500	19 450	1 250	1 183	17 000	145	8 250	69 628		
5. Availabilities (1+2+3+4)	15 680	9 300	95 150	42 900	2 000	1 615	19 000	179	9 450	179 623		
6. Internal deliveries												
a) colliery power stations	350	-	3 000	7 500	-	35	-	-	-	10 885		
b) public power stations	5 600	8 750	43 800	15 500	750	170	7 950	-	4 700	87 220		
c) coke ovens	6 925	-	27 350	11 200	-	-	8 950	-	3 300	57 725		
d) steel industry	37	-	850	780	100	-	-	65	300	2 132		
(of which power stations)	(-)	(-)	(600)	(100)	(-)	(-)	(-)	(-)	(300)	(1 000)		
e) other industries	975	250	9 000	4 300	1 040	350	1 960	110	700	18 685		
(of which power stations)	(-)	-	(4 800)	(-)	(-)	(-)	(-)	(-)	(400)	(5 200)		
f) domestic sector	1 150	250	1 100	2 150	60	1 060	100	4	75	5 949		
e) miscellaneous (total)	48	50	2 450	1 550	20	-	-	-	-	4 118		
of which : 1. issues to workers	(20)	(-)	(150)	(50)	(-)	(-)	(-)	(-)	(-)	(220)		
2. patent fuel	(23)	(-)	(1 200)	(1 250)	(-)	(-)	(-)	(-)	(-)	(2 473)		
3. own consumption	(5)	(-)	(250)	(250)	(-)	(-)	(-)	(-)	(-)	(505)		
4. gasworks	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)		
5. railways	(-)	(-)	(50)	(-)	(20)	(-)	(-)	(-)	(-)	(70)		
6. others	(-)	(50)	(800)	(-)	(-)	(-)	(-)	(-)	(-)	(850)		
7. Total internal deliveries (6)	15 085	9 300	87 550	42 980	1 970	1 615	18 960	179	9 075	186 714		
8. Deliveries to ECSC countries	600	-	8 200	410	-	-	-	-	120	(9 330)		
9. Exports to non-member countries	150	-	900	190	-	-	-	-	100	1 340		
10. Total deliveries (7+8+9)	15 835	9 300	96 650	43 580	1 970	1 615	18 960	179	9 295	188 054		
11. Movement of producers' and importers' stocks (5 to 10)	- 155	-	-1 500	- 680	+ 30	-	+ 40	-	+ 155	- 2 110		
12. Difference between totals (3 - 8) (2)										- 6 321		

(1) National series : 77.850

(2) The sub-total (without U.K.) for line 3 (arrivals from ECSC countries) includes 5 million tonnes of British coal not shown in the sub-total for /line 8.

TABLE 32 A

Coke balance sheet for 1983

(Provisional figures at 15 July 1984)

('000 tonnes)

	Belgique	Danmark	Deutschl	France	Hellas	Ireland	Italia	Lux.	Nederl.	total without UK	UK	EUR-10
1. Production												
- coke-oven coke	5 106	-	22 872	8 457	-	-	6 492	-	2 206	45 185	8 533	53 666
- gas coke	-	52	-	-	-	-	-	-	-	-	-	52
- TOTAL	5 106	52	22 872	8 457	-	-	6 492	-	2 206	45 185	8 533	53 718
2. Receipts from ECSC countries	355	53	505	1 152	16	6	94	1 630	504	(4 315)	42	(4 357)
3. Imports from third countries	88	1	340	-	24	1	-	-	60	514	668	1 182
4. Availabilities (1 + 2 + 3)	5 549	106	23 717	9 609	40	7	6 586	1 630	2 770	45 699	9 243	54 900
5. Inland deliveries												
a) steel industry	4 742	11	15 546	6 373	33	-	5 529	1 625	1 942	35 801	5 940	41 741
b) other industries	205	26	1 251	795	18	7	500	-	180	2 982	295	3 277
c) domestic sector	33	38	548	81	1	-	200	5	12	918	1 675	2 593
d) miscellaneous	12	-	902	476	-	-	-	-	-	1 390	800	2 190
of which : - issues to workers	(12)	(-)	(558)	(191)	-	-	-	-	-	(761)	(300)	(1 061)
- own consumption	(-)	(-)	(189)	(281)	-	-	-	-	-	(470)	(100)	(570)
- other	(-)	(-)	(155)	(4)	-	-	-	-	-	(159)	(400)	(559)
6. Total inland deliveries (5)	4 992	75	18 247	7 725	52	7	6 229	1 630	2 134	41 091	8 710	49 801
7. Deliveries to ECSC countries	431	4	2 960	534	-	-	7	-	621	(4 557)	176	(4 733)
8. Exports to third countries	180	31	990	376	-	-	200	-	65	1 842)	437	2 279
9. Total deliveries (6 + 7 + 8)	5 603	110	22 197	8 635	52	7	6 436	1 630	2 820	42 933	9 323	52 080
10. Stock movements at production and import (4 to 9)	- 62	- 4	+ 1 304	- 20	- 12	-	+ 129	-	- 80	+ 1 255	+ 109	+ 1 364
11. Statistical difference	+ 8	-	+ 216	+ 994	-	-	+ 21	-	+ 30	+ 1 269	- 189	+ 1 080
12. Difference between totals (3 - 7)	-	-	-	-	-	-	-	-	-	+ 242	-	- 416

TABLE 32 B

Coke balance sheet for 1983
(Revised July 1984)

('000 tonnes)

	Belgique	Danmark	Deutschl	France	Hellas	Ireland	Italia	Lux.	Nederl.	Total without UK	UK	EUR-10
1. Production											NOT AVAILABLE	
- coke-oven coke	5 250	-	21 000	8 400	-	-	6 620	-	2 200	43 470		
- gas coke	-	-	-	-	15	-	-	-	-	15		
- TOTAL	5 250	-	21 000	8 400	15	-	6 620	-	2 200	43 485		
2. Receipts from ECSC countries	465	60	500	1 450	50	8	73	1 852	400	(4 858)		
3. Imports from third countries	85	-	150	-	60	-	-	-	-	295		
4. Availabilities (1 + 2 + 3)	5 800	60	21 650	9 850	125	8	6 693	1 852	2 600	43 780		
5. Inland deliveries												
a) steel industry	4 900	7	16 400	8 100	30	-	5 783	1 850	1 700	38 770		
b) other industries	215	23	1 280	800	40	-	480	-	300	3 138		
c) domestic sector	25	20	540	140	-	8	100	2	-	835		
d) miscellaneous	10	-	880	430	20	-	-	-	-	1 340		
of which :												
- issues to workers	(9)	(-)	(540)	(100)	(-)	(-)	(-)	(-)	(-)	(649)		
- own consumption	(1)	(-)	(190)	(330)	(-)	(-)	(-)	(-)	(-)	(521)		
- other	(-)	(-)	(150)	(-)	(20)	(-)	(-)	(-)	(-)	(170)		
6. Total inland deliveries (5)	5 150	50	19 100	9 470	90	8	6 363	1 852	2 000	44 083		
7. Deliveries to ECSC countries	525	-	3 200	340	-	-	-	-	600	(4 665)		
8. Exports to third countries	125	10	1 200	390	-	-	330	-	-	2 055		
9. Total deliveries (6 + 7 + 8)	5 800	60	23 500	10 200	90	8	6 693	1 852	2 600	46 138		
10. Stock movements at production and import (4 to 9)	-	-	- 1 850	- 350	+ 35	-	-	-	-	- 2 165		
11. Difference between totals (3 - 7)	-	-	-	-	-	-	-	-	-	- 193		