COMMISSION OF THE EUROPEAN COMMUNITIES

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REPORT OF THE COMMISSION

ON

THE MARKET FOR SOLID FUELS IN THE COMMUNITY IN 1991 AND THE OUTLOOK FOR 1992

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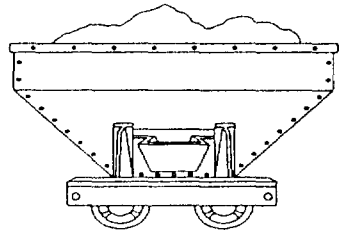

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I. INTRODUCTION

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

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

2. This report analyses the situation of the Community solid fuel market in 1991, makes forecasts for 1992 and gives corrected and updated data for 1990.

   The data for 1990 and 1991 is that available in January 1992. The forecasts for 1992 were made by the Member States at the end of 1991 and updated as far as possible at the time of writing.

II. SUMMARY

3. In 1991, economic growth in the Community was expected to grow by 1.3%, as against 2.8% in 1990, confirming a strong cooling off. The forecasts for 1992, however, suggest a moderate upswing when the economy should expand by 2.2%.

4. Community gross inland energy consumption rose 2.9% according to the first figures available for 1991. Consumption of all types of energy rose with respect to the previous year. A large proportion of this rise was due to weather conditions which were close to normal after three consecutive warm winters. With regard to solid fuels, demand in terms of gross inland consumption grew by a mere 0.3%, due exclusively to the increased demand of power stations which offset the lower demand in most of the other consumer sectors.

   Total primary consumption is likely to grow by another 1.5% in 1992. Once again the demand for all types of energy will probably grow, assuming normal weather conditions and a certain decline in the price of oil. Primary consumption for solid fuels will increase again by 0.6%.

5. Community hard coal production continues to decline steadily, as a result of the restructuring and rationalization policies adopted by the Member States. In 1991, production attained 192.1 Mt as compared with 198.0 Mt in 1990 (-5.9 Mt or -3.0%) and the forecast for 1992 is 186.5 Mt.

   On the other hand, lignite and peat production continues to rise, reaching 190.4 Mt in 1991, and is forecast to attain around 191.5 Mt for 1992(1).

   Community coke production continues to fail, partly as a result of cutbacks in the steel industry and partly as result of the technological changes introduced in steel production. 46.4 Mt was produced in 1991 as compared with 50.8 Mt in 1990 and the forecast for 1992 is 45.4 Mt.

6. Imports of hard coal from third countries exhibit a long-term trend contrary to that of Community hard coal. In 1991 imports rose to 129.0 Mt as compared with 115.9 Mt in 1990, representing 39.6% of the tonnage available in the Community.

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(1) Former GDR not included

(million tonnes)

	1990 Actual	1991 Estimates	1992 Forecasts	1992/91 Percentage
HARD COAL				
Resources				
-Production	198.0	192.1	186.4	-3.0
-Recoveries	5.9	4.6	3.1	-33.3
-Imports from third countries	115.9	129.0	131.0	+1.5
Total	**319.8**	**325.8**	**320.6**	**-1.6**
Deliveries				
-To coking plants	67.8	61.2	60.1	-1.7
-To power stations	208.4	216.3	214.7	-0.7
-To others	44.1	42.8	43.9	+2.5
-Exports to third countries	1.1	0.7	0.2	-64.2
Total	**321.4**	**321.0**	**319.0**	**-0.6**
COKE				
Resources				
-Production	50.8	46.4	45.4	-2.2
-Imports from third countries	1.4	1.2	1.2	-
Total	**52.2**	**47.5**	**46.5**	**-2.1**
Deliveries				
-To steel industry	45.3	42.7	42.9	+0.6
-Other deliveries within Community	5.3	4.5	4.4	-4.2
-Exports to third countries	0.8	0.6	0.5	-13.5
Total	**51.4**	**47.8**	**47.8**	-
LIGNITE AND PEAT				
Resources				
-Production and imports	189.0	190.4	193.9	+1.8
Deliveries				
-To briquetting plants	16.3	17.2	16.9	-1.5
-To power stations	167.5	169.2	173.1	+2.3
-Others (including exports to third countries)	5.6	4.8	4.8	+0.6
Total	**189.4**	**191.1**	**194.8**	**+2.0**

7. Imported hard coal prices declined steadily throughout 1991. The average guide price of coking coal for the fourth quarter dropped from 59.8 USD/t in 1990 to 59.2 USD in 1991. Prices for 1992 are expected to show a moderate rise.

The price of steam coal prices fell substantially throughout 1991; in the third quarter of 1991 it was 50.9 USD/tce as compared with 55.2 in 1990.

However, the drop in the prices for both imported hard coal and steam coal, expressed in US dollars, have been absorbed and even surpassed by the depreciation of Community national currencies in relation to the dollar. Prices of hard coal imported from third countries expressed in national currencies were therefore higher than for the previous year for the Community countries.

III. ECONOMIC SITUATION IN THE COMMUNITY IN 1991 AND THE OUTLOOK FOR 1992(2)

8. The economy of the European Community is undergoing a phase of slower growth. Current forecast confirms the strong cooling off during 1991 but suggests a moderate upswing for 1992. Seen against the backdrop of the strong-growth phase which preceded it and against the background of a stagnating world economy, the current economic slow-down, whilst not comforting, should not be exaggerated.

9. The cumulative effect of three basic elements explains the pronounced slow-down of the Community economy in 1991.

- Firstly, after four years of buoyant economic activity, a pause was inevitable and a correction of certain internal disequilibria was imperative.
- Secondly, the international environment became very unfavourable under the impact of the Gulf crisis, the recession in North America and a momentous transformation of central and eastern Europe.
- Thirdly, the influence of exceptional factors underpining economic activity in the recent past (for example, the effect of the announcement of the Community internal market programme and German unification) has tapered off during the course of the year.

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(2) Based on Commission forecast of October 1991.

10. As the fundamentally positive growth conditions in the Community have remained broadly unaffected, a recovery in economic activity is anticipated for 1992 and thereafter. The upswing is likely to be moderate, essentially for three reasons. Consumer and business confidence is improving only gently and hesitantly, thereby not presaging a strong rebound in consumption and capital spending in the Community in the coming months. Obviously the recovery should benefit from a more supportive international environment from 1992 onwards. However, in the Community, the impact of the latter risks being outweighed by the fall-out of unification-related German import-demand growth. Finally, the required restrictive stance of both fiscal and monetary policy is likely to impede a vigorous resurgence in economic activity.

11. On average economic activity in the Community is estimated to have increased by only 1.3% in real terms in 1991, as against 2.8% in 1990. This is the weakest rate of growth recorded since 1982 for the Community. A moderate upswing is expected during 1992, when economic activity should expand by 2.2%. Growth in employment is expected to have slowed down significantly to 0.4% per annum in 1991 and to virtually stagnate in 1992. As a result, the rate of unemployment is increasing again and could exceed $9^{1/4}$% of the civilian labour force in 1992, as against 8.4% in 1990. Inflation, at 5% in 1991, is expected to abate steadily, albeit remaining relatively high at around 4.5% in 1992.

12. In 1991, gross investment in the Community is expected to have declined in real terms for the first time since the recession of 1981-82. This fall, of half a percentage point, is largely attributable to the very sharp contraction of gross investment in the United Kingdom (-12.8%). However, Denmark, Greece, France, Ireland and Italy will probably also have experienced a decline in gross investment in 1991. Only in Germany, Luxembourg and Portugal is gross investment estimated to have expanded at a substantial rate during 1991. From 1992 onwards, investment is expected to resume a positive growth path given the gradual improvement in its determinants. In line with the expected improvement in the international environment and the acceleration of the world trade growth, export prospects should improve considerably and lead to increases in gross fixed capital formation in the Community of 2.2% in 1992.

Investment in construction has probably contracted by 0.5% in 1991 although the forecast for 1992 is for a positive growth path of some 1.8% being resuming, essentially under the impact of a general improvement in the economic climate and

a reduction in long-term interest rates. Investment in equipment, after an exceptional annual rate of expansion of around 9% in real terms over the period 1987-89, it is expected to have fallen to -0.4% in 1991 as against 4.7% in 1990. A moderate recovery in investment in equipment is forecast for 1992 in most of the Member countries.

13. The external position of the EC has changed significantly under the impact of German re-unification. The trade balance of the Community with the rest of the world is forecasted to have moved from surplus of 0.3% of GDP in 1990 to a deficit of 0.5% of GDP in 1991 where it is expected to remain for the following two years. This abrupt change is entirely due to the rapid narrowing of the German trade surplus in 1991 following the acceleration of domestic demand provoked by the re-unification process. The deficit on the current account balance is forecast to have widened to about 1% of GDP in 1991, and to remain unchanged in 1992 and 1993; again, the deterioration is attributable to developments in Germany.

14. In relation to the Community's external environment, the slow-down in world economy has proved to be more protracted than expected. World output growth is forecast to have been practically at a halt in 1991, growing at only 0.2% in real terms. The forecast of the OECD countries, excluding the Community, suggests GDP growth of a mere 1%. The poor outlook for 1991 is more a question of the timing of the expected recovery in world output rather than a change in the basic economic fundamentals. In general the extent of the slow-down in economic activity was foreseen but its duration has been underestimated. This is particularly true of the United States where expectations of a rapid and strong emergence from recession have not been realised at the time of writing. The recession in the other Anglo-Saxon countries and the slow-down in overall economic activity within EFTA have also retarded a resumption of world economic growth. There are nonetheless strong indicators that the recovery will get underway in 1992. World output is now forecast to increase by 2.1% in 1992 whereas output within the OECD (excluding Community Member States) might increase as much as 2.5%.

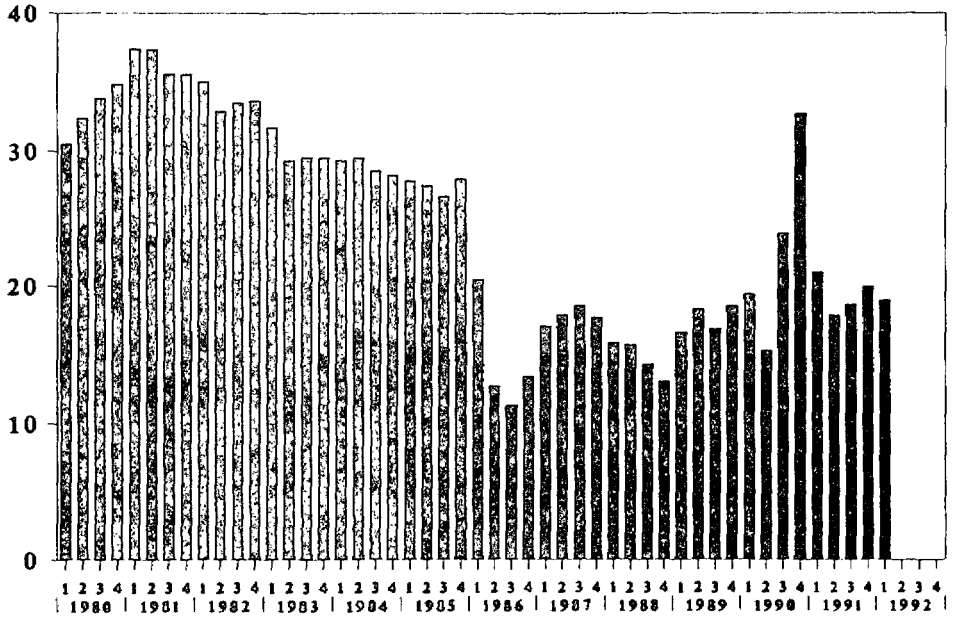
IV. DEVELOPMENT OF COMMUNITY ENERGY MARKETS (3)

15. On the basis of the macroeconomic assumptions mentioned above and a certain decrease in real oil prices in 1991 and 1992 with respect to 1990, total energy demand in 1991 could have grown by 2.9%. Forecasts for 1992, assuming normal weather conditions, point to a grow of some 1.4%.

16. Crude oil prices, which declined steadily between the beginning of the Gulf war and June 1991, started to rise slowly in July. However by the end of 1991 they again started to decline. The average imported crude oil price for 1991 is likely to have been around 19.4 USD/barrel against 22.9 USD in 1990. In 1992, the price could remain at a level of around 18 USD/barrel. Given the current oil supply situation, the main uncertainty comes from the former USSR, where it appears that a decline in production is being matched by a decline in consumption, whilst exports continue to flow. With an anticipated slow increase of world demand, and the slowly increasing Kuwaiti production, the most probable trend could be towards somewhat lower prices, even if Iraq continues to remain absent from the world market.

IMPORTED CRUDE OIL

US$/barrel

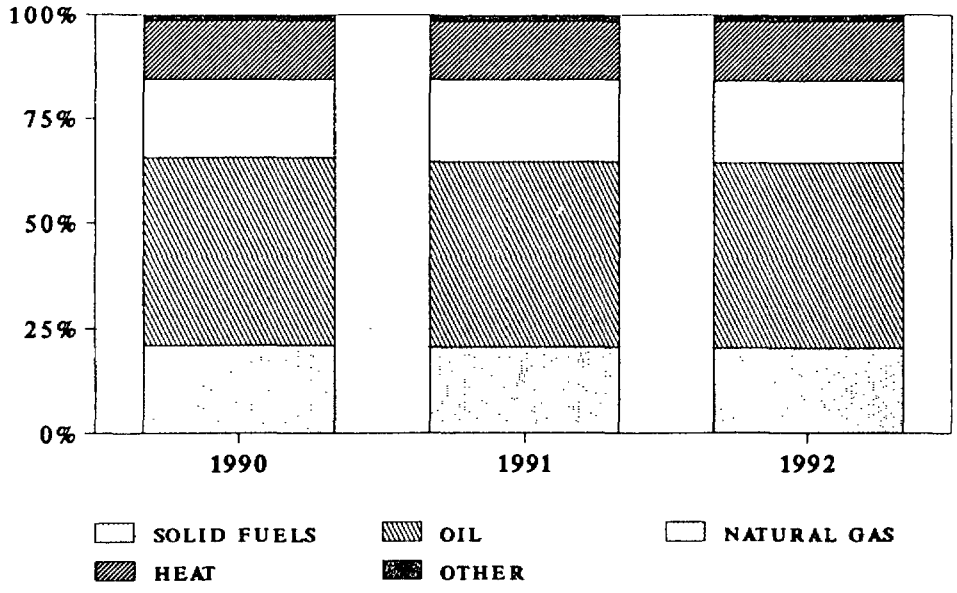


(3) Based on the "short term energy outlook for the European Community" ENERGY IN EUROPE. Directorate-General for Energy. Commission of the European Communities

17. There are two key factors to explain the changes in the growth of demand between 1991 and 1990. Firstly, the return in 1991 to weather conditions very close to "normal", putting an end to the exceptional weather conditions over the previous three years (1988, 1989 and 1990) which resulted in a substantial saving of energy. Moreover, the current estimation for 1991 gives an overall growth in energy demand of almost 3% although, in practice, 2.3% can be attributed to climatic factors. Secondly, it seems that weather corrected energy intensity gains in the Community are slowing down.

18. Demand for oil, in terms of total inland deliveries, which increased by 1.1% during 1990 may have grown by 1.6% in 1991 and could grow by 1.3% in 1992.

SHARE OF THE VARIOUS FORMS OF ENERGY
GROSS INLAND CONSUMPTION

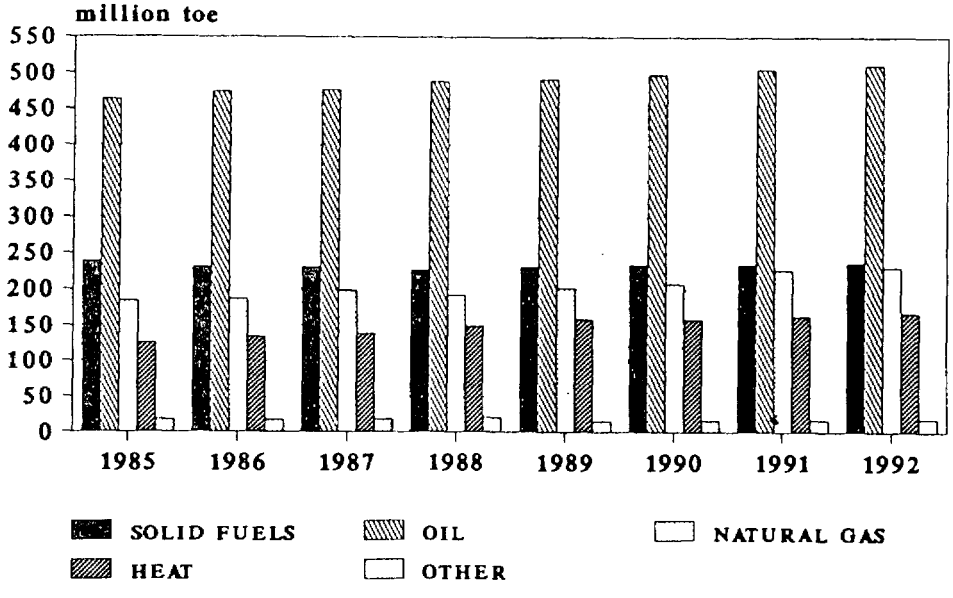


19. Demand for natural gas is expected to have increased by more than 9% in 1991. This fast growing trend, due mainly to weather conditions, will probably slow considerably in 1992. Under the current economic and weather assumptions, demand in 1992 could grow by only 1.5%.

Consumption of natural gas in 1990 and first half of 1991 was undoubtedly influenced by the Gulf crisis as some fuel switching took place. However, according to present data, use of natural gas for power generation decreased in the first half of 1991 by almost 6%.

20. For the second consecutive year, total demand for solid fuels in terms of gross inland consumption grew in 1990 by about 1.3%, is expected to have grown by a mere 0.3% in 1991 and to grow by about 0.6 % in 1992. The foreseeable increase in demand on the part of power stations will be offset by a lower demand in most of the other consumer sectors. The demand for solid fuel is increasingly linked to power stations.

PRIMARY ENERGY BALANCE
GROSS INLAND CONSUMPTION



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21. Electricity demand has probably increased by 3.2% in 1991 and could increase by 2.7% in 1992.

Normally, production by the nuclear sector should have increased in 1991 as total

generating capacity has itself slightly increased. Production of nuclear electricity could have increased by 2.9% in 1991 and increase by 2.2% in 1992.

Hydro-electric production continued to recover during 1991 but in any case remained considerably below 1988 levels. The increase in hydro-electric production is notable not because 1991 was a good year for rainfall, but because production in both 1990 and 1989 was exceptionally low.

Production of electricity by conventional thermal power stations may finally have increased in 1991 by 2.5% and increase in 1992 by 2.1%. In 1991, the increase in production has been taken up by solid fuels. For 1992, it is probable that demand for solid fuels and oil will increase by 1% to 2% and natural gas likely be the fastest growing fossil fuel (at around 5%).

22. With respect to the energy supply, total Community energy production in 1991 has probably increased by 15 Mtoe, to reach 601 Mtoe, due to the increase in production of natural gas, nuclear power and hydro-electricity (production of solid fuels and oil are decreasing), and net imports up by almost 20 Mtoe to 587 Mtoe.

Total net imports probably represented about 49.8% of total primary energy consumption (including bunkers) in 1991 compared to 43.3% in 1985.

V. DEMAND FOR SOLID FUELS

Deliveries of hard coal (Table 3)

23. Deliveries of hard coal in the Community remained practically unchanged in 1991 compared to 1990. Internal deliveries accounted to 320.3 Mt and still remain below the amounts for the period 1985/86.

Nevertheless, if internal deliveries did not change this was mainly due to the increase of deliveries to power stations (+7.9 Mt or +3.8%) which compensated for the loss of hard coal penetration in most of the traditional markets. In particular, deliveries to coke ovens fell by 6.6 Mt (-9.8%).

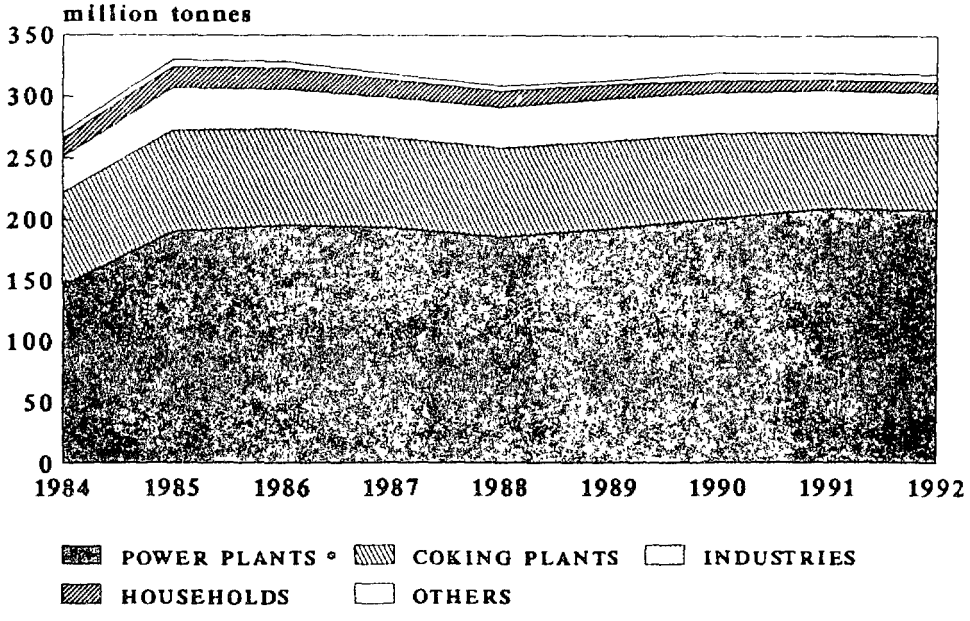
Demand for hard coal is increasingly tied to electricity generation. For example, whilst in 1985 deliveries to public power stations and to coke ovens, the two main

consumer sector for hard coal, accounted for 55% and almost 25% of the total, in 1991 they corresponded to 64% and 19 % respectively.

24. For 1992 the volume of internal hard coal deliveries to the whole Community is expected to fall somewhat (-1.6 Mt; -0.5%). Deliveries to all the main sectors will suffer a certain decline except those corresponding to the iron and steel industry (+1.2 Mt; +21.5%).

The drop in deliveries to power stations is significant (-1.6 Mt or -0.7%) but this is chiefly due to the fact that the United kingdom and France expect their deliveries of hard coal to the electricity sector, after the exceptional increases registered in 1991, to be down by 2.5 Mt and 0.5 Mt respectively, returning to a volume of deliveries more in line with those of 1990. On the other hand, Germany and Italy expect to increase their deliveries by 1.3 Mt and 0.6 Mt respectively. The remaining countries are not expected to have shown large changes with respect to 1991 as the variations are lower than 0.5 Mt.

INLAND DELIVERIES OF HARD COAL



° Public and pithead power stations

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Deliveries to coke ovens are expected to show the same downwards trend compared to previous years, although perhaps more moderated Forecasts point to a drop of 1.0 Mt (-1.7 %). The slow-down in the activity of the Community steel industry together with the considerable changes which are taking place in steel-making technology, which are leading to reduced requirements for coke and hence for coking coal, as well as lower input of coal per unit of steel output, will continue to curtail coal usage in this sector. Only deliveries of steam coal for injection into blast furnaces, as a partial substitute for coke, will increase in the coming years.

25. Coke-making (tables 4 and 5)

Over the last years, about 90% of the coke consumed in the Community goes to the steel industry, mainly in the blast-furnaces. However, the running of these furnaces has undergone technical modifications and improvements, tending to reduce the amount of coke required for the production of pig-iron. One way to attain this goal is to inject into the blast-furnaces cheaper and lower quality steam coal which has not been burdened with the relatively high coke production costs. In some cases, up to 200 kilos of coke per tonne of pig iron have been substituted by about the same quantity of injected steam coal. This evolution, together with the other techniques used to increase the efficiency of the blast-furnaces, has already resulted in a substantial reduction of the specific consumption of coke per tonne of pig iron.

The community average of injected coal is 80 kilo per tonne of pig iron, but a level of 100 kilo can be achieved without any difficulty, which could reduce the consumption of coke by as much as 2 Mt in a few years. The increasing use of scrap in steel production is also helping to lower coke consumption.

26. Taking into account the downward trend of activity in the steel industry, resulting in a total steel production of about 133.4 Mt in 1991 (down 3.3 Mt with respect to the figure for 1990), it is not surprising that deliveries of coke to steel plants have decrease by 2.7 Mt (-5.9%) in the same period to reach 42.7 Mt. For 1992, a certain stability is forecast since deliveries are expected to be 0.3 Mt up (0.6%) with respect to 1991, reaching 42.9 Mt.

27. With regard to the main steel producing Member states, 1991 saw steel production fall in the United Kingdom (- 9.5%), in France (by 4%) and in Italy (-2.2%), but increase by 1.5% and 1.3% in Germany and Spain respectively. For 1992, the

activity in the different steel-consuming sectors would appear, from all the information gathered, to be heading in a better direction in 1992. For example, the period of growth for electrical engineering is likely to continue whilst motor vehicle manufacturing, mechanical engineering and the manufacture of metallic articles are likely to emerge from the recession. The construction industry, however, is likely to remain slightly depressed as in 1991. Total steel production, therefore, is expected to increase slightly, by about 1.8%.

28. The remaining coke deliveries total barely 4.5 Mt, which is a sharp drop in relation to the previous year (-13.7%). Exports also fell to around 0.6 Mt in 1991 as against 0.8 Mt in 1990. For 1992, all the indicators points to a further decrease in internal deliveries of about 4.21% to reach 4.4 Mt.

29. **Power stations** (Tables 6A and 6B)

On the basis of the information available at the time of writing, the growth in demand for electricity could have been some 3.2% in 1991. However, this trend could be reversed in 1992 with a growth of demand only in the order of 2.7%.

In 1991, production by nuclear sector should have increased as total generating capacity has itself slightly increased. Production of nuclear electricity could have increased by 2.9% in 1991 and increase by 2.2% in 1992. This means that its contribution to electricity production is likely to have fallen slightly from 36.9% in 1990 to 36.7% in 1992 as a consequence of the higher overall rate of growth of electricity demand.

Hydro-electric production continued to recover during 1991. However, even assuming that this trend persists in 1992, it is probable that it will remain considerably below 1988 levels. The share covered by hydro-electric production in the total electricity production was 8.5% in 1990 and 9.2% in 1991, levels which are far below the 11.9% reached in 1988.

According to initial estimates, conventional thermal power generation is expected to have increased by 2.5% in 1991. Solid fuels consumption rose 5.2 Mtoe (+3.4%) and hard coal, in particular, rose by 4.4 Mtoe (+3.6%).

30. In 1991, according to the information provided by coal producers, hard coal deliveries to public and industrial power stations were up by 8.0 Mt (+3.8%) on the

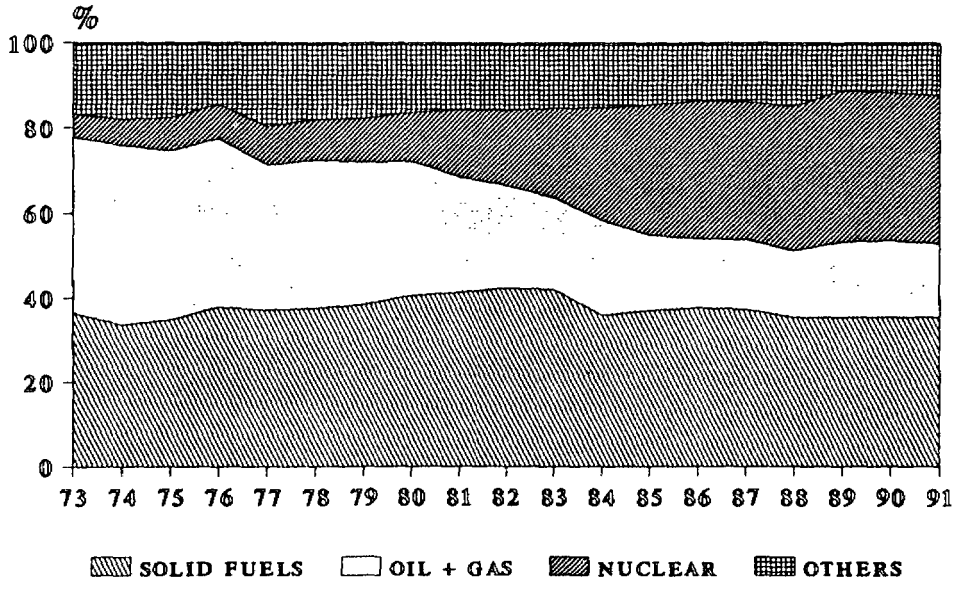
previous year and, according to the information provided by transformers, up by 6.1 Mt (+2.9%) to reach 216.3 Mt. Information provided by the producers indicate that the highest rises, by country, in absolute terms, were recorded in Denmark (+3.2 Mt), the United Kingdom (+2.9 Mt), France (+1.7 Mt) and Spain (+0.9 Mt). On the other hand, only three countries showed falls; the Netherlands, Italy and Portugal with 0.7, 0.9 and 0.3 Mt respectively.

Examining those countries with the highest rises, the United Kingdom saw an increase of coal stocks at power stations together with a lower level of electricity generation from petroleum products and a higher demand for electricity.

France saw the EdF continue to increase its stocks as a safeguard against any fuel supply incidents and a substantial proportion of growth in electricity demand satisfied by hard coal power stations.

Finally, in Denmark, the increase in deliveries was the result of a dramatic drop in the importation of electricity and the growth of electricity demand being met by coal power generators.

ELECTRICITY GENERATION
BY SOURCE



31. For 1992, forecasts for the Community as a whole point to a drop of 1.6 Mt (-0.7%), mainly due to United Kingdom (-3.0 Mt or -3.5%) and France (-0.5 Mt or 3.6%). This will result in the volume of deliveries being more in line with those of previous years after the exceptional increases in 1991. On the other hand, Germany and Italy both plan to increase their deliveries by 1.3 and 0.6 Mt respectively.

As usual, it has been observed that there is a certain tendency for the Member states to base their forecasts on a normal usage of other energy sources for electricity generation (mainly nuclear and hydro) in such a way that coal is finally used to cover any gaps left by those energy sources. This could explain, to large extent, the drop in deliveries to this sector. However, coal still finally covers most of the deficits cause by unforeseen events in electricity production, such as problems in nuclear power plants or a shortage of rainfall.

32. <u>Other industries</u> (Table 7)

"Other industries" covers many varied industries. Outstanding amongst them is the cement industry and, to a lesser extent, the ceramics industry, as the largest potential consumers of hard coal.

For the Community as a whole, hard coal deliveries to this sector, excluding their own power generation, remained largely the same in 1991 at a level of 22.6 Mt, varying by only 0.2 Mt (+0.9 %) in relation to the previous year. The sharpest variations were recorded in United Kingdom (+0.2 Mt or 3.0%) and in Germany (0.14 Mt or 5.3%). In the other countries variations upwards or downwards were lower than 0.1 Mt.

For 1992, the volume of hard coal deliveries to this sector is expected to fall somewhat (-0.2 Mt or -1.0%). The main changes downwards are anticipated in France (-0.2 Mt) and in the United Kingdom (-0.1 Mt). On the other hand, Italy expects to increase its deliveries by 0.2 Mt. The expected downwards trend in the oil prices for 1992 could be the responsible for the small loss of penetration for coal in this sector.

33. <u>Domestic use</u> (Table 8)

The fall in consumption of solid fuels in this sector is undoubtedly one of the most

pronounced. This market is declining steadily and is showing no signs of stability in the near future. The loss of sales is not due solely to the good weather conditions of recent years but also, in many cases, to environmental regulations which tend to discourage the use of solid fuels, especially in the urban areas, in favour of other fuels considered to be more environment friendly.

Deliveries of hard coal for domestic consumption, including supplies to miners' families, fell to 9.2 Mt in 1991 from 9.8 Mt in 1990. They have therefore fallen by 48% over the last five years.

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

Total solid fuels deliveries to this sector were 15.0 Mt in 1991, as against 15.7 Mt in 1990 and 14.5 Mt that are forecast for 1992.

34. Deliveries of lignite and peat(4) (Table 9)

Total internal deliveries of lignite and peat fared well during 1991 attaining 191.1 Mt, 1.7 Mt up on the previous year, owing as much to a certain increase in deliveries to power stations (+1.7 Mt) as to briquetting plant (+0.9 Mt). On the contrary, deliveries to "Others" fell by 0.8 Mt to 4.8 Mt. Overall, the main rise of 3.0 Mt was seen in Germany, of which 2 Mt went to power stations and 1.2 Mt to the briquetting plants.

Forecasts for 1992 are for an increase, with a further rise of 3.8 Mt (+2.0%). This is mainly accounted for by the rising demand from utilities in Germany (+2.1 Mt) and in Greece (+2.0 Mt). Deliveries to briquetting plant, however, are likely to fall slightly (-0.3 Mt).

VI. COMMUNITY SOLID FUEL PRODUCTION

Hard coal (Table 10)

35. Community hard coal production in 1991 continued the trend of the previous years with production capacity dwindling slowly but surely as a consequence of the

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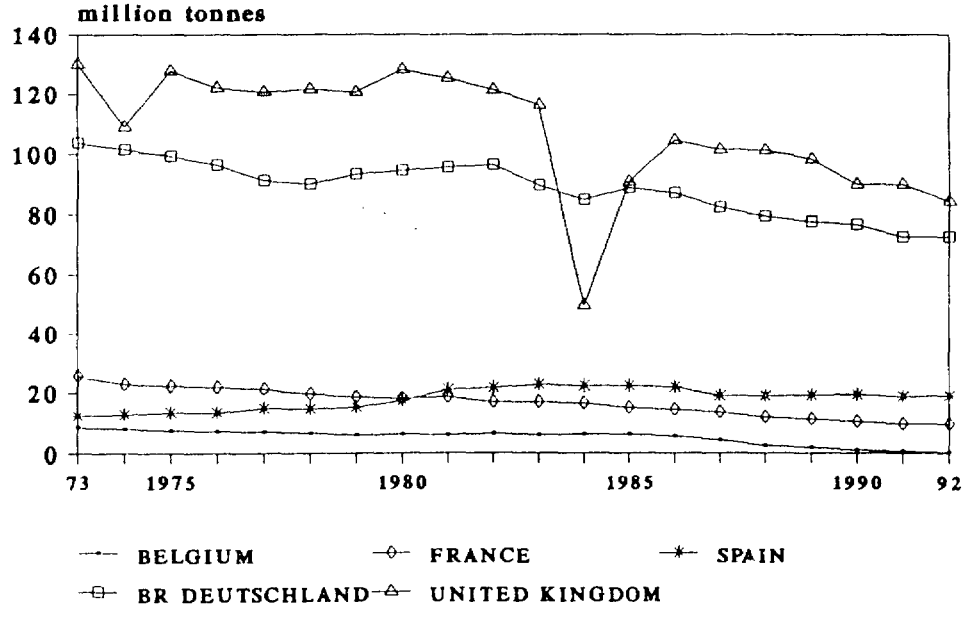
(4) Former GDR not included

Member States' policies to restructure and improve competitiveness. Production dropped 3.0% (-5.9 Mt) in 1991 in relation to the previous year, to 192.1 Mt.

The greatest changes for individual countries were seen in Germany with -4 Mt (-5.2%), followed by France with -0.7 Mt (-7.0%), Spain with -0.5 Mt (-2.8%) and Belgium with -0.4 Mt (-40.5%). On the other hand, hard coal production in the United Kingdom remained substantially unchanged, in spite of the ten or so pits closed during 1991. The closures have been compensated by the gains in productivity.

For 1992 similar developments are expected with a drop in production of 5.7 Mt (around -3.0%) in relation to 1991. This is largely due to the drop expected in United Kingdom (-5.5 Mt or 6.5 %) as Germany, Spain and France do not anticipate any substantial variation in their total output and, in fact, plan to maintain their production levels.

HARD COAL PRODUCTION



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36. By the end of 1990 France had closed down all coal mining operations in the Nord/Pas-de-Calais area. Further capacity reductions are planned in the Lorraine and Centre-Midi coalfields.

37. In the United Kingdom there were further pit closures under the restructuring programme which began in 1985. The number of pits in November 1991 was 59, as against 69 at the end of 1990.

The current contracts with National Power and PowerGen (70 Mt/year in 1990/91 and 1991/92, and 63 Mt for 1992/93) are due to expire in March 1993. However, in March 1991, Scottish Power entered into a contract with British Coal for the provision of coal which expires in March 1995. The market for domestic coal may therefore reduce significantly after 1993 when the main contracts expire. Although it is too soon to determine the outcome of the negotiations for contracts after 1993, the electricity sector are currently expanding and improving port facilities both as an argument to force a better deal in the future with British Coal and to meet the increased demand for thermal coal in the coming years. Total projects already launched, and those soon to be agreed upon, will increase the generator's import capability by some 14 Mt.

38. Portugal will close the only coal mine in operation by 1995. In addition, Portugal also wishes to increase its coal imports from 4 to 6 Mt/year when the new coal-fired power station at Pego becomes operational in 1996. Expanded deep water facilities at Sines, to accommodate vessels up to 150000 dwt, will service both the existing and the new Pego power stations' combined coal requirements.

39. In July 1990 the Spanish Government submitted to the Commission, under the state aids authorization procedure, a plan to restructure, rationalize and modernize the coal mining industry that is not under public control. This established the main lines to be followed until 1993. This has been supplemented by another, similar, plan, for those firms receiving direct Government grants.

During 1991, the Spanish government presented to the Parliament the new National Energetic Plan (P.E.N.), being under discussion at the time of writing.

This plan established the main guide-lines on energy policy from 1991 up to 2000. As far as coal is concerned, 1888 MW are planned of which 1338 (5 groups ranging between 150 MW and 350 MW) will consume indigenous coal (mainly from open cast) and 550 MW imported coal.

40. Production cuts in Germany affected the Ruhr coalfields and, to a lesser extent, the Aachen area.

In November 1991 the latest round of the German hard coal talks ("Kohlerunde") ended. The participants essentially agreed on the main guide-lines for German coal until 2005, the main conclusions being:

- Subsidised deliveries of German coal would be cut to 50 Mtce by the year 2000 and would remain constant at this level until 2005. Taking into account an additional production of 4 Mt/year of unsubsidised coal for the heating market, total production in 2000-2005 is planned to be a maximum of 54 Mtce.
- Deliveries within the framework of the "Jahrhundertvertrag" contract to power stations would be 40.9 Mtce/year until 1995; although, in 1995, 3.4 Mtce would be taken from the stockpiles and production reduced accordingly. It was also agreed to ensure deliveries after 1995 (although at a lower level) to the electricity generators and to the steel industry with vertical agreements up to the year 2005 inclusive. However, the electricity industry announced that it would only accept such an agreement if the coal industry was in the position to deliver the coal at world market prices.

At the time of writing no opinion from the Commission had been given.

41. Lastly, in Belgium, the only operational colliery is due to be closed by 1992 at the latest.

42. <u>Lignite and peat</u> (Tables 9, 26 and 27)

Lignite production in 1991 is estimated to have been some 187.8 Mt(5), slightly more than the previous year (0.9 Mt).

For 1992, total lignite production is forecast to rise by 3.7 Mt (+2.0%) to around

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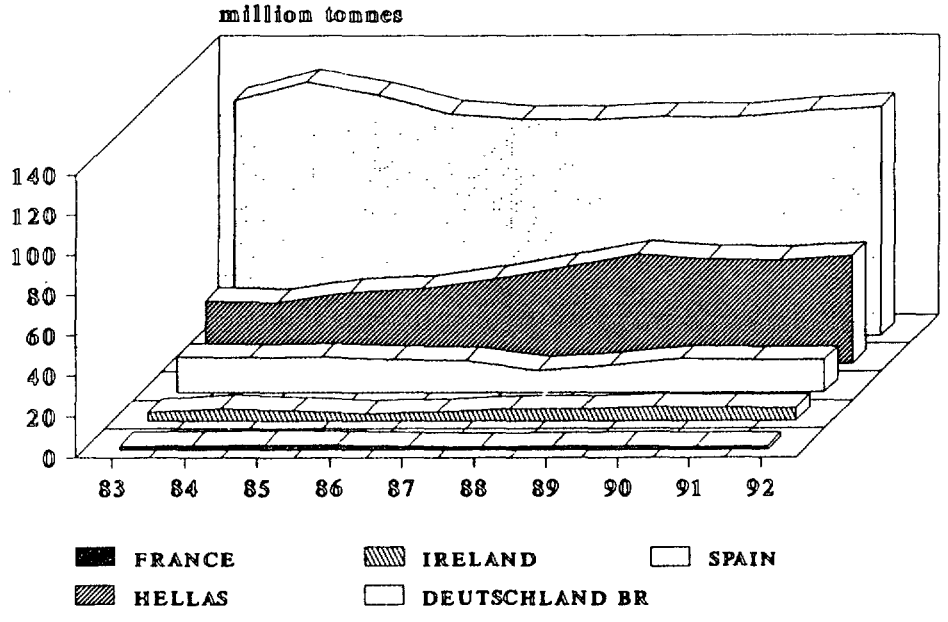
(5) Former GDR not included

191.5 Mt. The main increases will be in Germany with 2.1 Mt and Greece with 2.0 Mt.

Once again lignite production and consumption are increasingly linked to electricity generation (89% of available resources) and, in some countries, demand and consumption are even subject to the availability of other sources of energy, such as hydroelectric power.

Lignite briquettes production in 1991 was 6.3 Mt and forecasts for 1992 point to 5.9 Mt, of which Germany produces around 91 % of the total tonnage.

DELIVERIES OF LIGNITE AND PEAT



* Not including new Länder

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43. Lignite industry in the new German Länder

The transition from the centrally-planned economy to a market economy in the former GDR is taking place under special conditions. The immediate introduction of the market economy was due to the belief that the coexistence of two different economic orders within the territory of a single state, even for a transitional period,

was not possible. Thus the lignite industry of the former GDR was abruptly faced with the requirements of a market economy.

44. The Government of the former GDR pursued an energy policy the aim of which was to satisfy as much of the demand as possible by domestic lignite, the only indigenous source of energy available in the GDR. This autarkic policy resulted in an efficient lignite industry that essentially reached the state-defined production aims.

The production costs for lignite in eastern Germany calculated by heat content are, on average, higher than in western Germany but substantially lower than those for hard coal. On the other hand, the majority of the lignite-based power plants are outdated and inefficient and do not have the modern environmental protection facilities.

45. After the reunification the German Government adopted the following measures in the field of energy policy:

- introduction of modern environmental standards,
- introduction of free prices for energy,
- privatisation of the energy industry.
- the opening up of the market for competing suppliers and for other sources of energy.

46. The opening up of the energy market, the freeing of prices and the introduction of stringent environmental standards had a substantial impact on the lignite industry even in the year immediately following the adoption of these measures.

Price liberalization within the energy sector was introduced as a gradual process but within a very short space of time. For private households, however, a transitional period was felt necessary as lignite prices for domestic use had, for decades, been kept at the level of the post-war period. The same basically applied to electricity and gas. The additional costs were covered by state subsidies. These subsidies, which kept consumer prices at a low level, have been gradually abolished in slightly under a year and, with respect to lignite briquettes, for example, this meant a fourfold increase in price.

47. The coal-chemical industry has meanwhile been closed down as cheaper raw materials are now available. The end of brown coal gasification is imminent as this is not economically viable. Sales to private consumers fell considerably and will further decline as oil and gas become more important. It is probable that, from 1995 onwards, briquettes will not be use any longer. With the general fall in industrial production, electricity consumption fell sizably, and this presented the opportunity to close particularly uneconomical power plants.

48. All the above-mentioned factors have resulted in the fact that only 174 Mt of lignite were likely to have been used in 1991 compared to 249 Mt in 1990. A rapid structural change, with a further fall in demand, is expected in the next few years in such a way that figures estimated for the year 2000 are some 130 Mt, and maybe even less. Lignite will, however, continue to be required primarily for power generation since the forecasts for the conversion sectors (mainly for lignite briquettes) are around 20 Mt.

However, despite the fact that the eastern lignite industry faces an inevitable decline, due to the loss of markets, the industry has not called for any long term support, in contrast to the situation in the hard coal industry. The lignite industry has collapsed partly because of its great environmental damage and partly, although to a lesser extent, because of the production costs for lignite which were relatively high in the past.

49. The fall in lignite production is a considerable burden for the industry, the workforce and the lignite-producing regions since it will result in the closure of plants and in the loss of jobs.

The number of persons employed in the lignite industry has fallen from 130 000 to 90 000 in the last two years. A further rapid reduction of the workforce is expected to occur in the near future as the industry attempts to reach the productivity levels of western Germany. The closure of so many plants is a considerable burden for the mining industry. At the same time, however, it offers the opportunity to concentrate on the most efficient open-cast mining sites and factories.

Currently steps for the privatisation of the lignite industry are on the table.

50. Production figures and utilization in the years 1990 and 1991 were as follows:

(million tonnes)

	1990 actual	1991 estimates	1991/90 (%)
RESOURCES:	**249.0**	**174.3**	**-30.0**
- Production	248.9	174.0	-30.1
- Imports	0.0	0.3	
UTILIZATION:	**249.0**	**174.3**	**-30.0**
- Briquetting	101.3	70.0	-30.9
- Power stations	106.9	78.3	-26.7
- Others	40.7	26.0	-36.2

note.- 0.0: less than 0.05 million tonnes

51. As far as the briquetting industry is concerned, major changes have occurred in the last two years and are expected to continue in the near future. The total output of briquettes and their final use during 1990 and 1991 were as follows:

(million tonnes)

	1990 actual	1991 estimates	1991/90 (%)
RESOURCES:	**39.75**	**20.07**	**-49.7**
- Production	39.50	19.80	-49.9
- Supplies from old Länder	0.25	0.22	-13.0
- Imports from third countries	-	0.05	
USE:	**39.75**	**20.07**	**-49.5**
- Industry	12.95	5.30	-59.1
- Domestic use	23.84	14.12	-40.8
- Deliveries to old Länder	1.05	0.29	-72.7
- Deliveries to other ECSC countries	0.33	0.02	-93.9
- Exports	1.59	0.35	-78.0

The two main markets for briquettes are the domestic heating of households and deliveries for the production of coke lignite briquettes.

The main reasons for the decline of the briquettes market are:

- The decrease in the use of coke lignites due to their environmental impact.

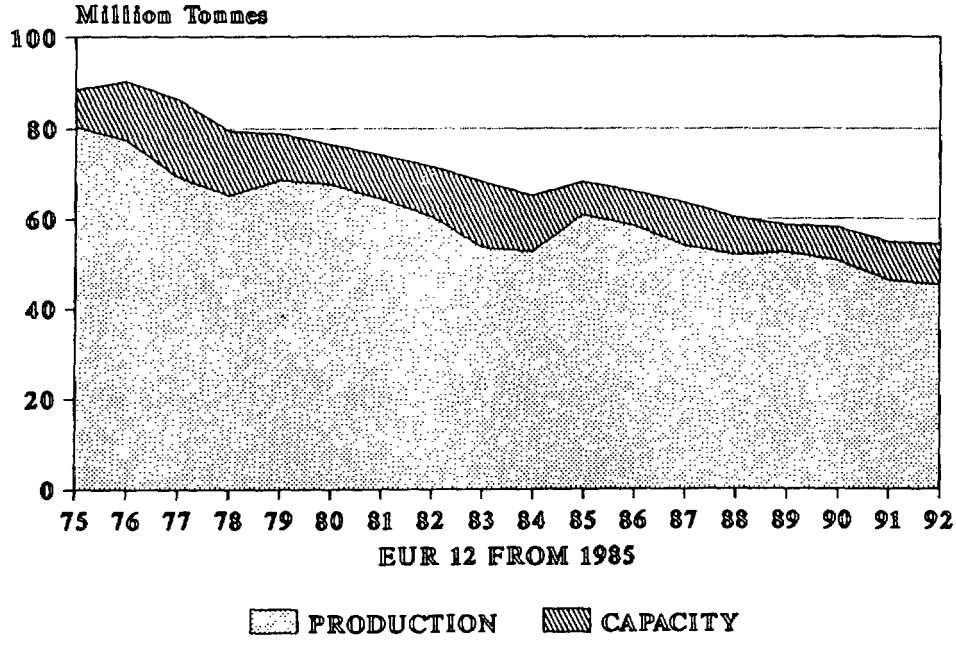
- The removal of state subsidies for lignite briquettes which increased the competitiveness of fuel oil and natural gas.

However it should be noted that the drop in lignite production is more marked in the Mittel region due to the higher sulphur content there compared to the lignite from Lausitz. Overall, therefore, the prospects for the briquettes market are not very encouraging.

52. Coke (Tables 11A and 11B)

Total Community coke production capacity in 1991 reached 54.9 Mt, as compared to 58.3 Mt in 1990, and the forecast for 1992 is for 54.5 Mt. On the other hand, actual coke production in 1991 was 46.4 Mt (-4.4 Mt), continuing the steady decline that has been observed over the last few years. For 1992, all indicators point to a further reduction of 1.0 Mt to a total of 45.4 Mt. Moreover, coke-production/nominal-capacity ratio is deteriorating from 87.1% in 1990 to 83.3% in 1992.

COKE PRODUCTION AND CAPACITY



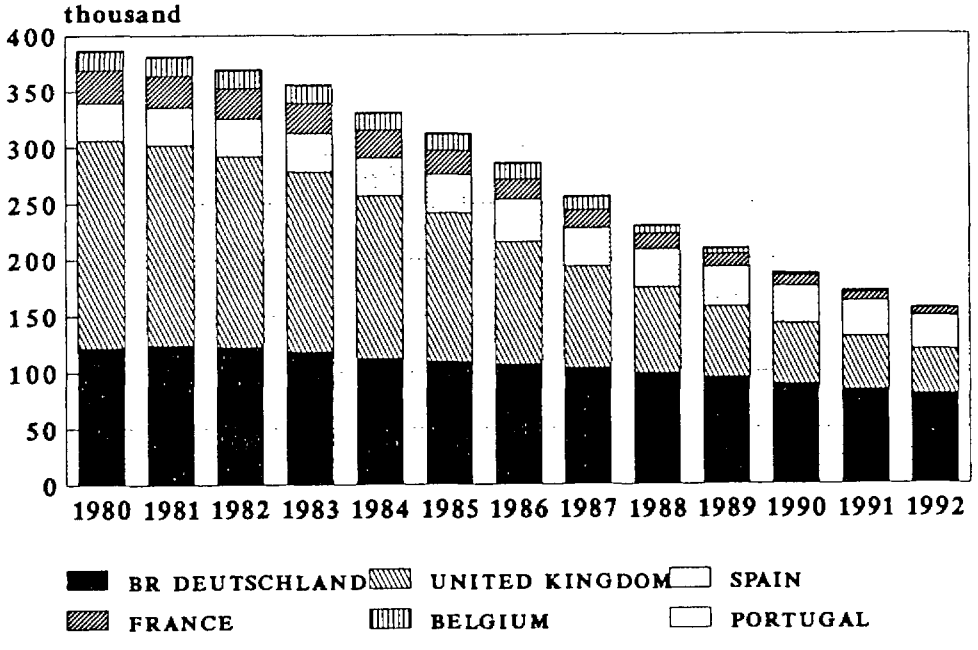
This decline is due to the weak performance of the steel industry which absorbs some 90% of the coke available.

53. <u>Labour and productivity</u> (Tables 12A and 12B)

The annual average underground workforce fell again by almost 15800 (-8.4%) in 1991, as compared with 23 500 jobs lost in 1990, to a new total of 171300. The United Kingdom accounted for almost half of the losses (42.4%), followed by Germany (30%) and France (12%).

The estimates for 1992 are similar, with losses expected to be around 15000 jobs, mostly in the United Kingdom.

PERSONNEL EMPLOYED UNDERGROUND



Productivity is still tending to rise, a logical consequence of the restructuring measures adopted by all Member States which are concomitant with the closure of the least profitable, and generally least efficient, pits. On the other hand, in the

process of closing a mine, it is the non-production workers who are first to leave and this is why very pronounced productivity rises can be observed in the stages leading up to the final closure of mining operations.

54. Productivity for underground workings, for the whole Community, rose from 628 kilograms per underground worker per hour in 1990 to 660 in 1991. The sharpest increases took place, again, in the United Kingdom and France.

55. State aids

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

	TOTAL INTERVENTION (MECU)			PER TONNE (ECU/tonne)		
	1989	1990	1991	1989	1990	1991
Belgium	159.4	80.6	61.2	85.9	80.6	76.5
Germany	4417.0	4204.8	1)1853.7	57.0	54.5	1)25.5
France	174.6	166.2	165.3	15.2	15.4	16.2
Spain	508.7	499.2	1)131.3	26.5	26.4	1)6.9
Portugal	4.6	4.6	4.5	20.4	20.2	16.1
U. Kingdom	*1538.0	-	-	15.7	-	-
Total	6802.3	4955.4	1).	32.6	24.8	1).

1) It should be noted that some financial interventions notified to the Commission (Spain for 1991 and Germany for 1990 and 1991) are still awaiting a Commission decision.

56. With respect to State aid to the coal industry, the Commission approved, on 11th November 1991, a report to the Council on the application of Decision No

* Not including 5089.5 MECU reflecting the reduction in value of the fixed assets of British Coal, aid covering compensation for hearing loss and deliveries of coal to workers.

2064/86/ECSC establishing Community rules for State aid to the coal industry during the period 1987-90.

This report presented the forms of aid granted by member States and analysed the trends in the aid authorized under Decision 2064/86/ECSC since 1987.

The main developments between 1986 and 1990 were:

a) for the Community as whole, the total volume of aid in current money terms increased by 7%, whilst aid per tonne increased by 25%, despite a reduction in some countries;
b) an increasing trend to grant indirect, rather than direct, aid.

In some Member States this aid, combined with other measures, formed part of a modernisation, rationalization and restructuring programme for the sector, designed either to produce a healthier industry or to close it down completely. In other states, however, it has provided no incentive to embark on programmes to restructure production capacity. Similarly, production costs remained high, and are continued to rise, in Spain and Germany in marked contrast to the substantial reduction in the United kingdom and France.

In the course of the application of the Decision, problems were encountered with the definition of the concept of aid, with evaluation of the aid and with late, incomplete, notification by Member States which delayed decision-making by the Commission. Nevertheless, the Commission has proposed that Decision 2064/86ECSC should not be amended before it expires, whilst at the same time stressing the need to step up the efforts to improve transparency of State aid, notably by inclusion, in principle, of aid in public budgets and scalling-down of such aid.

The Commission recognized that the world market price for coal was certainly not a sufficient yardstick for measuring the competitiveness of coal mined in the Community. In particular, the world market price did not take account of criteria such as security of supply or long term trends in the cost of supplies. It therefore felt that the best approach for a new system of State aid could be to define a reference price (reference cost) which would remove the major uncertainties concerning the prospects for Community coal and set the maximum limits for a reasonable security premium for mining in the Community.

57. **Investment trends** (Table 13)

First estimates indicate a further drop in investment compared to previous years. For the Community as a whole investments are expected to have been 938 MECU in 1991, which represents a reduction of 11.2% in relation to the previous year. For 1992 a further decrease is forecast to 710.2 MECU. The biggest decreases, in absolute terms, are expected in Germany and United Kingdom with drops of 109.5 and 55.7 Mecu respectively.

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

VII. SOLID FUEL PRICES

58. The main exporting countries have seen large improvements in productivity over the last few years. For example, the United States has seen productivity at the underground mines more than double over the last ten years and in opencast rise by 80%. Increases in this decade in underground mining could be of around 50%. Substantials improvements have been achieved in Australia and South Africa. As most of these gains have benefited the buyers, the coal market currently continues to be a buyer's market. The market has also seen a narrowing of price difference between steam and coking coal.

All coal exporters are likely to see their production costs rise but as long as competition for market shares continues to be fierce, the traded prices will probably not suffer large fluctuations. In addition, the extra cost of pollution and emission control measures, and the introduction of a tax modulated on energy and carbon content, is likely to dampen price increases to avoid the loss of the penetration of coal in the energy market and the consequent loss of a considerable portion of revenues by coal exporters.

59. **Exchange rate** (Table 14)

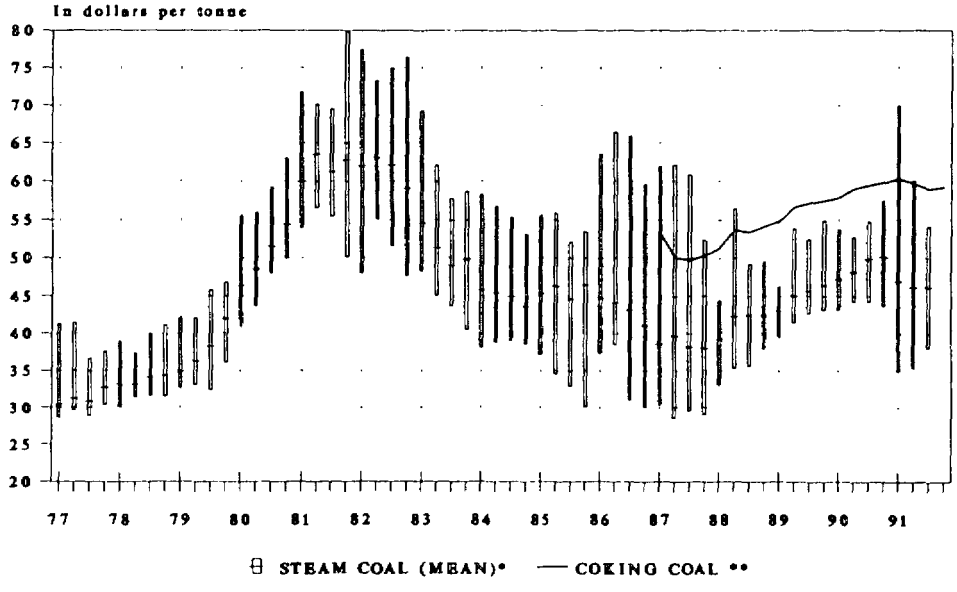
The value of the US dollar compared to Community currencies increased during 1991, showing an opposite trend to that of 1990. Its average appreciation towards

the ECU was 3.05% in 1991 compared to 1990, with the highest appreciation being for the third quarter of 1991 (10.1%).

60. **Trend of imported coal prices**

An important fact to note is the strength and imperturbability of the international coal market with respect to the fluctuations and instability seen in other energy markets, at least during a short time span. The recent war in the Persian Gulf and the temporary rise in oil prices did not cause a corresponding rise in coal prices. This can be attributable to a sluggish spot market and an ample, and diverse, supply.

MEAN CIF PRICES FOR HARD COAL IMPORTED FROM THIRD COUNTRIES



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

Both coking coal and steam coal CIF prices in US dollars declined during 1991. Nevertheless, these drops were offset by the substantial appreciation of the US dollar with respect to the Community currencies.

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

At a general level, the world coking coal market, after starting 1991 with a certain tendency to decline, appears to have experienced an upturn in the last months of

1991 and the demand forecast for 1992 could be higher than previous projections. Consequently coal producers appear to be revising their price expectations.

The reasons for the decline at the beginning of the year can be found in:

- The incertainties surrounding a possible, imminent, war in the Gulf.
- The slow-down of the economic growth that, at the beginning of the year, some economic experts thought would develop into an economic recession.
- The pessimism surrounding the U.S. steel industry.
- The expected decline in demand from large steel producers both inside, and outside, the Community.

Therefore the demand for good quality coal, far from falling in 1991, has risen with respect to 1990 and 1992 could well see a steady demand, or even a slight rise.

62. For the future, the volume of coking coal needed to produce steel will decline proportionally as steel producers internationally adopt the new pulverised coal injection technology (PCI). While PCI cuts the requirements for the total amount of coal used in steel production, the quality of coke must be superior to withstand the higher pressure in the blast furnaces.

The sea-borne coking coal trade has stabilised at around 160 Mt, although some expansion or growth could be expected in the next five years, with shipments climbing to 170 Mt.

63. The guide CIF price for the major Community ports calculated by the Commission for coking coal imported from the United States, Australia, Poland and Canada under medium- and long-term contracts started 1991 with a downwards trend which it reversed in the fourth quarter of the year.

The guide price for third quarter of 1991 dropped to US 58.9 dollars from the US 60.4 dollars reached in the first quarter of the year, and then rose to US 59.2 dollars in the fourth quarter (compared to US 59.8 dollars for the same period in 1990).

Ocean freight rates went up to a maximum of US 8.7 dollars for the fourth quarter of 1991, that is US 1.4 dollars higher than in the same period for the previous year.

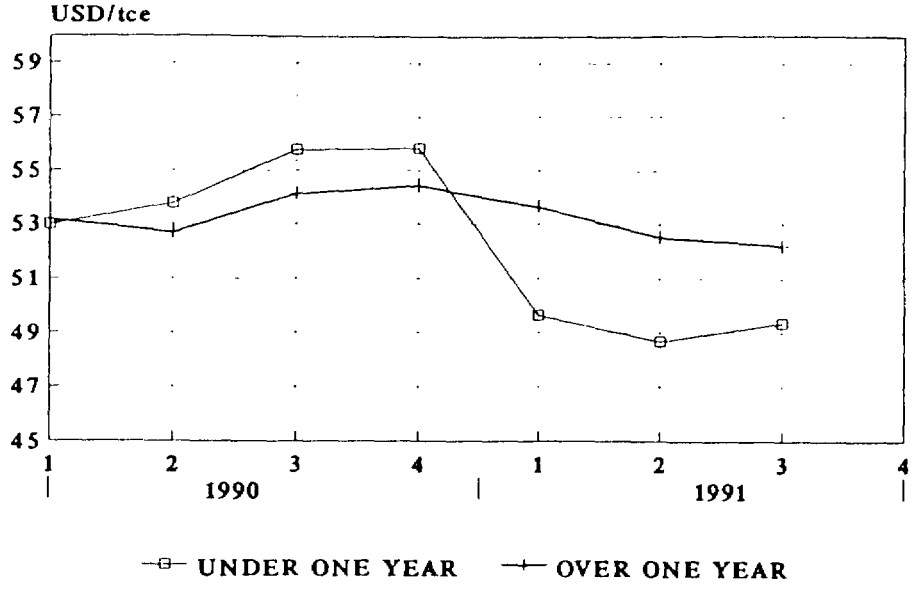
Some slight price increases in the volatile world coking coal market could occur during 1992.

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

65. <u>(b) Steam coal</u> (Tables 15A and 15C)

In the third quarter of 1991 the average CIF price, at the major European ports, for steam coal imported from non-Community countries was USD 50.92 per tce, as compared with USD 55.21 at the same time in the previous year (a drop of 7.8%). However, since the average US dollar exchange rates for the third quarter 1991 were 0.849479 ECU and 0.771300 ECU for the third quarter 1990, the real price variation in Community currencies was, in fact, an increase of 1.58%

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



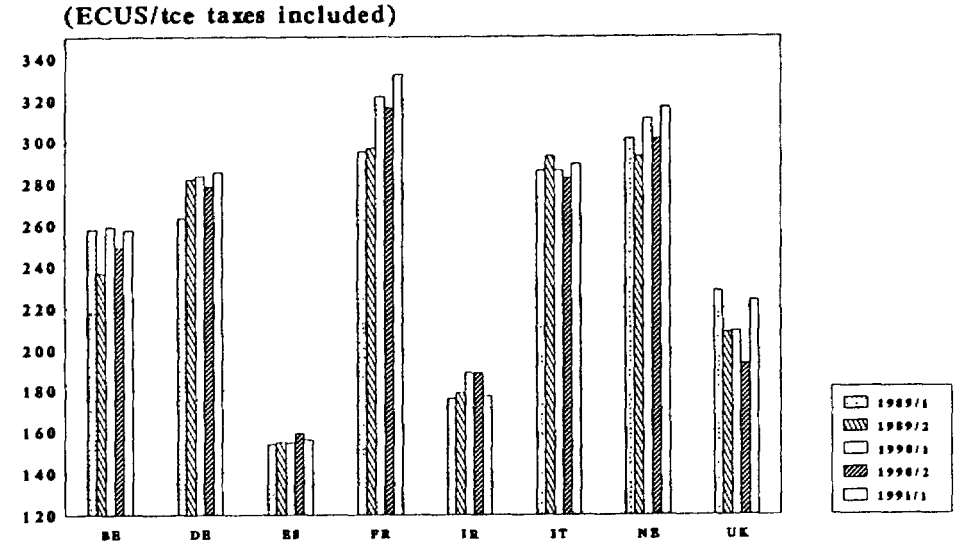
The Member States provided the Commission with the figures for steam coal imports in accordance with Decisions 77/707/ECSC and 85/161/ECSC.

66. <u>**Price of hard coal for domestic use**</u> (Table 16)

The table compares the ECU prices which small consumers paid for household coal

(mainly anthracite) on the 1st January 1991 (the latest information available) with those of the previous year. In Belgium and Ireland these prices have decreased, whilst in the rest of the countries prices have risen, particularly sharply in the United Kingdom. In any case, there are big differences in prices for hard coal for domestic use in the Community (see graphic).

PRICE FOR HARD COAL-HOUSEHOLD CONSUMER



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VIII. TRADE IN SOLID FUELS

67. Hard Coal: world trade and production

World hard coal production remained at the level of 3.5 billion tonnes, although in 1991 total production may have fallen by 1.6%. However, there were regional differences in the trends as Community production continued to decline, as well as

that of the Eastern European countries (including the former USSR) due to the decline in demand resulting from the recession, the introduction of pricing in accordance with market principles, the general political reorientation, and the reorganization of the mining industry.

Countries with sustained growth in production, such as China, India, Australia, Indonesia and Colombia, increased their production, as a whole, throughout 1991 by some 40 Mt. On the other hand, in those countries with falling production, either as a result of the rationalization of their own mining industries due to high costs (EEC and Japan), or for sociopolitical reasons or labour troubles or a combination of both (such as Poland, the USSR and the other Eastern European countries) and exceptionally the United Stated for that year, the production loss was about 90 Mt.

68. World coal trade is triggered by import demand which has been growing steadily. In 1991, global hard coal demand and consequently world coal trade is estimated to have increased by 11 Mt to 412 Mt. 90% of the total coal trade has been transported by sea, but the trend has been towards shorter hauls to handle the large amount of freight. Coking coal accounted for 39% in 1991 world coal trading, whilst the rest consisted of the different qualities of hard coal.

In a global context, the Asia-Pacific region has been continuing its advance not only as a major coal importing area but also as the main exporting region in the world. Australia, China and Indonesia have been exporting as much as the two North American countries.

69. Intra-regional trade in 1991 tended to fall into three main regions; North America, Eastern Europe and the European Community. Total Regional trade is estimated to be 27% down on the previous year.

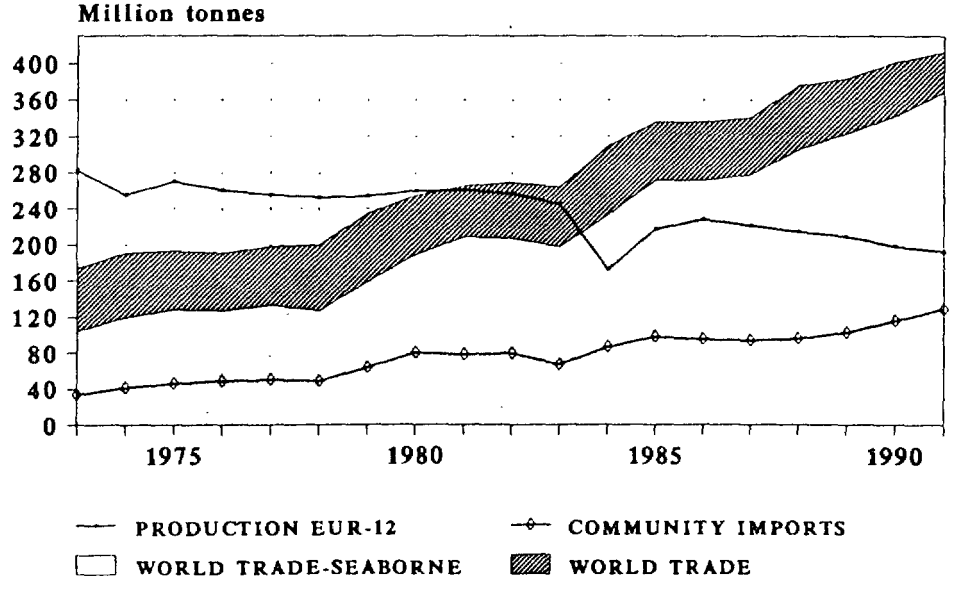
Eastern European countries are facing great problems in their transition to free market trade. They have great difficulties in securing the required supplies because of the breakdown of their multilateral trading arrangements and lack of funds for buying coal from free market.

70. In the maritime hard coal trade, which represents only slightly more than 9% of world hard coal production, the Community, Japan and south east Asia represented by Hong Kong, South Korea and Taiwan account for something over 81%, consisting of 49.3% coking coal and the rest other hard coal qualities, principally

steam coal. In all these countries, imported hard coal makes up for the shortfall in their own hard coal production, which is steadily declining if it exists, and also partly for new energy needs.

71. For the future, metallurgical coal and steam coal will become increasingly interchangeable as larger amounts of weaker and semisoft coals are incorporated in the coke blend or used as pulverized fuel (PCI) for direct blast furnace injection. On the other hand, some low sulphur hard coking coals will find their way into power generation where the worries on emissions and the environment will probably provoke an increase in demand for good quality coal.

EVOLUTION OF THE WORLD TRADE FOR COAL
COMMUNITY PRODUCTION & IMPORTS



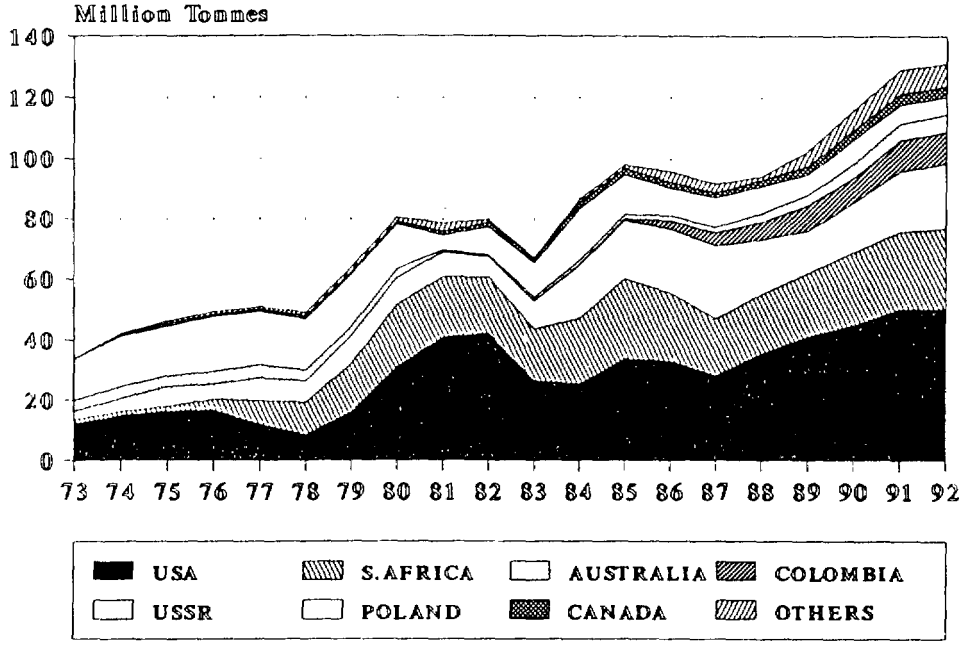
72. Community trade with third countries (Table 18)

Imports of hard coal from non-Community countries are expected to have reached a new high in 1991 of 129 Mt, as rise of 13.1 Mt in relation to the previous year's imports. Three countries were mainly responsible for this increase: the United Kingdom (+6.8 Mt), Denmark (+4.2 Mt) and France (+2.9 Mt). In the remaining

countries, the variations were lower than 1 Mt. This sharp increase in imports was a result of the higher demand from power stations.

73. In 1992 Community imports are expected to rise more moderately to 131.0 Mt (+2.0 Mt). Only Italy (+2.0 Mt), Germany (+1.0 Mt) and the United Kingdom (+0.6 Mt) expect to increase their imports appreciably. On the other hand, imports could fall by 1.2 Mt in France, depending on the performance of the nuclear electricity generating industry. In the remaining countries, the level of imports will be roughly maintained at the same level, with country variations not expected to be higher than 0.3 Mt.

HARD COAL IMPORTED FROM THIRD COUNTRIES



74. The United States continues to be the Community's main supplier with 39.2% of the market, followed by South Africa with 19.5%, Australia 15.6%, and Colombia and Poland some way behind. These countries together supplied 86.9% of the Community's imports in 1991.

For 1992, China, Poland and, to a lesser extent, the United States and Canada are

likely to lose some of their market share (although it is clear that this will not affect their position as the Community's major suppliers) to suppliers such as Australia, South Africa, the former USSR and, to a much lesser extent, Indonesia and Venezuela.

75. Intracommunity trade (Tables 19A and 19B, 20A and 20B)

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

Hard coal trade continued to declined slowly but steadily, to 7.5 Mt in 1991 from 10.3 Mt in 1990. On the basis of this trend 5.9 Mt are forecast for 1992.

Community exchanges will decline even more in the near future. German subsidies for exporting coking coal will stop by the end of 1993 and therefore this type of coal will no longer have much chance to compete with the coking coal coming from third countries. On the other hand, current non-subsidised exports account for a few hundred thousand tonnes. This effectively means that the steel industries of the Community that are importing coking coal from Germany will be looking for alternative source of supply within two years.

76. The trade in coke is also tending to decline, reaching 3.7 Mt in 1991. For 1992 the trade is expected to decline further to 3.3 Mt.

77. With respect to the circulation of hard coal within the Community, since 1st January 1991, there has been no intra-community restriction on imports of coal originating in third countries.

As regards hard coal produce in the Community, it is free to move between Member States. However, national arrangements, consumption and pricing systems do not favour such movement. In addition, the prices producers are paid for their exports are mostly in line with those of deliveries from non-Community countries and, taking account of Community production costs, are therefore not profitable. This encourages the steady decline in intra-Community trade.

IX. STOCKS

78. Hardly any information was available for 1991 at the time of writing on hard coal and coke stocks.

X. CONCLUSIONS

79. Total energy demand may have grown by 2.9% in 1991. This high rate of growth is, to a large extent, the result of a return to normal weather conditions, putting an end to the exceptional weather conditions over the past three years. Moreover, in practice almost 80% of the increase can be attributed to climatic factors. The forecast for total energy demand in 1992 points to an increase of 1.4% assuming normal weather conditions.

80. Although total hard coal deliveries in the Community appears to oscillate around 320 Mt, the proportion of the energy needs covered by coal is, gradually and consistently, declining in relative terms.

81. As in previous years, an increasing share of the hard coal market is covered by imports from third countries, accounting for the room left by the contraction of Community hard coal production.

Imports of hard coal were expected to reach a new high in 1991 of 129 Mt, representing 13.1 Mt than in previous year. In 1992, Community imports are expected to show a moderate rise to 131 Mt.

82. Total inland deliveries of hard coal remained stable in 1991 at a level of 320.3 Mt and are still remaining below the 1985/86 values. Nevertheless, if the internal deliveries did not change this was mainly due to the increasing demand from the power stations (+7.9 Mt) which compensated for the loss of penetration by hard coal in most of its traditional markets, and specially in coke making sector. For 1992, the volume of internal deliveries is expected to fall somewhat (-1.6 Mt). Deliveries to all main sectors, even to power stations are expected to suffer a certain decline, with the main exception of deliveries to the iron and steel industry.

83. The slow-down in the activity of the steel industry together with the changes which are taking place in steel-making technology will continue to curtail coal

usage in this sector. Only deliveries of steam coal for injection into blast furnaces, as a partial substitute for coke, is expected to increase in the coming years.

84. Deliveries to other industries remained substantially stable at around 22.5 Mt. The penetration of hard coal in these sectors could decline slightly if prices for alternatives fuels, mainly petroleum products, continue their downward trend.

85. Demand of solid fuels for domestic use is declining steadily and is showing no signs of stability in the near future. The environment regulations will discourage the use of solid fuels in favour of other fuels considered to be more environmentally friendly.

86. Demand for lignite (excluding the former GDR) continues to rise gradually increase, mainly due to the increasing demand from power stations.

87. Prices for both imported coking coal and imported steam coal have steadily declined in relation to the US dollar throughout 1991. Unfortunately, falling hard coal prices have been offset, and indeed overtaken, by the depreciation of the Community currencies with in relation to US dollar, in such a way that there has been actually an increase in real prices.

88. Environmental issues are exerting pressure on the energy market. Energy and environmental sustainability are now given equal weighting to energy security and costs in the planning and evolution of the energy activities. Concern for the greenhouse effect is leading to a number of initiatives which are presently at the discussion and planning stage. However, although coal specially is suffering some serious environmental set-backs, it will continue to be an essential partner for the Community energy needs. The research and development of new coal combustion technologies will play an essential role in order to confront the current challenges for coal.

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TABLE 1 A

GROSS INTERNAL ENERGY CONSUMPTION

COMMUNITY

09-Mar-92 14:19:17

	1990 Actual		1991 Provisional		1992 Forecasts	
	million toe	%	million toe	%	million toe	%
Solid fuels	234.3	21.01%	234.8	20.46%	236.1	20.27%
Oil	497.4	44.61%	505.4	44.03%	511.5	43.92%
Natural gas	207.7	18.63%	226.9	19.77%	230.3	19.78%
Nuclear energy	156.5	14.03%	161.1	14.04%	165.6	14.22%
Other	19.2	1.72%	19.6	1.71%	21.0	1.80%
total	1115.1	100.00%	1147.8	100.00%	1164.5	100.00%

Source : Energy-Monthly statistics n.1/1992-Series 4B-EUROSTAT
Energy in Europe-DG XVII

TABLE 2

Share of solid fuels in gross internal energy consumption

04-Feb-92

	Year	Hard coal		Lignite and peat		Total Solid Fuels	
		M Toe	%	M Toe	%	M Toe	%
E	73	194.489	20.87	27.529	2.95	222.018	23.82
U	74	187.700	20.62	29.336	3.22	217.036	23.84
R	75	166.917	19.42	27.188	3.16	194.105	22.58
	76	176.579	19.27	32.202	3.51	208.781	22.78
1	77	173.450	18.99	29.948	3.28	203.398	22.27
0	78	175.717	18.66	29.809	3.17	205.526	21.83
	79	191.291	19.39	31.859	3.23	223.150	22.62
E	80	202.560	19.61	35.724	3.46	238.284	23.06
U	81	201.106	20.13	37.515	3.76	238.621	23.88
R	82	197.264	20.21	37.214	3.81	234.478	24.02
	83	192.388	19.95	37.989	3.94	230.377	23.89
1	84	180.636	18.23	39.050	3.94	219.686	22.18
2	85	200.662	19.50	38.345	3.73	239.007	23.22
	86	195.754	18.76	35.773	3.43	231.527	22.19
	87	198.086	18.64	33.179	3.12	231.265	21.76
	88	192.997	17.91	33.760	3.13	226.757	21.05
	89	195.560	17.80	35.443	3.23	231.003	21.03
	90	199.397	17.88	34.880	3.13	234.277	21.01
	91	200.100	17.43	34.700	3.02	234.800	20.45
	92	200.900	17.25	35.200	3.02	236.100	20.27

TABLE 3

COMMUNITY HARD COAL DELIVERIES BY SECTOR AND BY COUNTRY

04-Feb-92 (Million tonnes)

	COMMUNITY				
	1990 Actual	1991 Provisional	1992 Forecasts	1991/1990 % Difference	1992/1991 % Difference
A. SECTOR					
- Thermal power stations (1)	208.4	216.3	214.7	3.81	-0.73
- Coke ovens	67.8	61.2	60.1	-9.80	-1.71
- Iron and steel industry	5.6	5.4	6.5	-4.77	21.49
- Other industries	22.4	22.6	22.4	0.85	-1.02
- Domestic sector and coal workers	9.8	9.2	9.1	-5.75	-1.67
- Patent fuel plants	2.7	2.8	2.7	4.67	-3.60
- Own consumption at mines	0.4	0.4	0.4	-10.89	4.17
- Gasworks	0.1	-	-		
- Others	3.2	2.5	2.9		
Total	320.3	320.3	318.8	-0.01	-0.49
B. COUNTRY					
Belgium	15.0	14.9	15.0	-0.29	0.64
Denmark	10.2	13.2	13.5	28.88	2.29
Germany	80.7	79.6	79.2	-1.44	-0.44
Spain	29.8	30.5	30.7	2.30	0.59
France	30.0	30.4	29.9	1.48	-1.81
Greece	1.4	1.5	1.6	7.14	6.67
Ireland	3.2	3.1	2.9	-2.54	-4.56
Italy	21.3	18.9	21.2	-11.02	12.14
Luxemburg	0.2	0.3	0.3	32.32	0.00
Netherlands	15.1	14.0	13.7	-7.45	-2.15
Portugal	4.9	4.6	4.5	-7.34	-2.04
United Kingdom	108.7	109.5	106.4	0.78	-2.83
COMMUNITY	320.3	320.3	318.8	-0.01	-0.49

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

TABLE 4

COKE DELIVERIES BY SECTOR AND BY COUNTRY

04-Feb-92 ('000 tonnes)

	COMMUNITY				
	1990 Actual	1991 Provisional	1992 Forecasts	1991/1990 % Difference	1992/1991 % Difference
A. SECTOR					
- Iron and steel industry	45322	42667	42933	-5.86	0.62
- Other industries	2523	2146	2118	-14.94	-1.30
- Domestic sector	945	865	845	-8.47	-2.31
- Others	1804	1537	1394	-14.80	-9.30
Total	50594	47215	47290	-6.68	0.16
B. COUNTRY					
Belgium	5336	5100	5100	-4.42	0.00
Denmark	40	40	40	0.00	0.00
Germany	15972	15350	15250	-3.89	-0.65
Spain	3587	3495	3500	-2.56	0.14
France	7663	6840	6810	-10.74	-0.44
Greece	30	40	40	33.33	0.00
Ireland	11	25	20	127.27	-20.00
Italy	6413	5432	5598	-15.30	3.06
Luxemburg	1447	1369	1368	-5.39	-0.07
Netherlands	2260	2300	2300	1.77	0.00
Portugal	235	224	264	-4.68	17.86
United Kingdom	7600	7000	7000	-7.89	0.00
COMMUNITY	50594	47215	47290	-6.68	0.16

TABLE 5

DELIVERIES OF HARD COAL TO COKING PLANTS (1)

04-Feb-92 ('000 tonnes)

1990 : Actual 1991 : Provisional 1992 : Forecasts		National hard coal	Hard coal from other ECSC countries	Total ECSC hard coal	Hard coal from third countries	Total supplies
Belgium	1990		702	702	6430	7132
	1991			0		6700
	1992			0		6700
Germany	1990	22557		22557		22557
	1991			0		20450
	1992			0		18800
Spain	1990	138	377	515	3933	4448
	1991			0		4200
	1992			0		4300
France	1990	1829	803	2632	7000	9632
	1991			0		8500
	1992			0		8500
Italy	1990		836	836	7778	8614
	1991			0		7750
	1992			0		8182
Netherlands	1990		769	769	3119	3888
	1991			0		3800
	1992			0		3800
Portugal	1990			0	376	376
	1991			0		274
	1992			0		345
United Kingdom	1990	3600		3600	7576	11176
	1991			0		9500
	1992			0		9500
Community	1990	28124	3487	31611	36212	67823
	1991	0	0	0	0	61174
	1992	0	0	0	0	60127

(1) For 1991 and 1992 the breakdown by origin is not available

TABLE 6 A

DELIVERIES OF HARD COAL TO POWER STATIONS

04-Feb

(tonnes)

1990 : Actual 1991 : Provisional 1992 : Forecasts		Public power stations (1) (2)					Private generating plants		
		National hard coal	Hard coal from other ECSC countries	Total ECSC hard coal	Hard coal from third countries	Total public power stations	collieries	other industry	Total
Belgium	1990	1905		1905	4584	6489	119		6608
	1991					5740	125		5865
	1992					5910	85		5995
Denmark	1990		558	558	8624	9182		49	9231
	1991					12331			12331
	1992					12683			12683
Germany	1990	38914	333	39247	6981	46228	1788	5049	53065
	1991					45430	1970	5000	52400
	1992					46800	1800	5000	53600
Spain	1990	18230		18230	3811	22041		67	22108
	1991					22700			22700
	1992					22800			22800
France	1990	2071	510	2581	5661	8242	3668	69	11979
	1991					10500	3500	50	14050
	1992					9500	4000	80	13580
Greece	1990					0			0
	1991					100			100
	1992					200			200
Ireland	1990	32		32	1944	1976			1976
	1991					2000			2000
	1992					1900			1900
Italy	1990	95		95	9710	9805			9805
	1991					9400			9400
	1992					10000			10000
Luxemburg	1990								
	1991								
	1992								
Netherlands	1990			0	9693	9693			9693
	1991					9000			9000
	1992					8700			8700
Portugal	1990	266		266	3464	3730			3730
	1991					3431			3431
	1992					3262			3262
United Kingdom	1990	76850	36	76886	5195	82081	36		82117
	1991					85000			85000
	1992					82000			82000
Community	1990	138363	1437	139800	59667	199467	5611	5234	210312
	1991					205632	5595	5050	216277
	1992					203755	5885	5080	214720

(1) For 1991 and 1992 the breakdown by origin is not available

(2) Information for 1990 from "transformers", thereby causing the statistical differences with respect to tables 3 and 6B where the information has been provided by the producers

TABLE 6 B

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

04-Feb-92 (Million tonnes)

	1990	1991	1992	1991/1990 %	1992/1991 %
	Actual	Provisional	Forecasts	Difference	Difference
BELGIUM					
- Hard coal	5.6	5.9	6.0	4.42	2.22
DENMARK					
- Hard coal	9.1	12.3	12.7	35.18	2.85
GERMANY					
- Hard coal	46.4	47.4	48.6	2.19	2.53
- Black lignite	2.4	2.5 a	2.5 a	6.16	0.11
- Brown coal	91.1	92.9 a	95.0 a	1.99	2.25
SPAIN					
- Hard coal	21.8	22.7	22.8	3.99	0.44
- Brown coal	16.6	16.0	16.0	-3.64	0.00
FRANCE					
- Hard coal	12.3	14.0	13.5	13.66	-3.57
- Black lignite	1.3	1.2 a	1.1 a	-9.90	-5.88
- Brown coal	0.6	0.5 a	0.5 a	-6.47	-5.88
GREECE					
- Hard coal		0.1	0.2		
- Brown coal	50.5	51.0	53.0	0.94	3.92
IRELAND					
- Hard coal	2.0	2.0	1.9	2.09	-5.00
- Peat	3.5	3.6	3.6	2.86	-1.39
ITALY					
- Hard coal	10.5	9.4	10.0	-10.51	6.38
- Brown coal	1.6	1.5	1.5	-3.78	-3.33
NETHERLANDS					
- Hard coal	9.7	9.0	8.7	-7.34	-3.33
PORTUGAL					
- Hard coal	3.7	3.4	3.3	-8.02	-4.93
UNITED KINGDOM					
- Hard coal	82.1	85.0	82.0	3.56	-3.53
COMMUNITY					
- Hard coal	203.3	211.2	209.6	3.92	-0.75
- Black lignite	3.6	3.7	3.6	0.47	-1.79
- Brown coal *	163.9	165.5	169.5	1.03	2.39

* Including peat

a Estimations of the Commission of the European Communities

TABLE 7

HARD COAL AND COKE DELIVERIES TO OTHER INDUSTRIES
(WITHOUT IRON AND STEEL INDUSTRY)
(EXCLUDING POWER STATIONS)

04-Feb-92

('000 tonnes)

	1990 Actual	1991 Provisional	1992 Forecasts	1991/1990 % Difference	1992/1991 % Difference
A. HARD COAL					
Belgium	995	1005	1000	1.01	-0.50
Denmark	531	500	475	-5.84	-5.00
Germany	2564	2700	2700	5.30	0.00
Spain	2626	2630	2570	0.15	-2.28
France	4017	4000	3800	-0.42	-5.00
Greece	1300	1320	1320	1.54	0.00
Ireland	550	429	413	-22.00	-3.73
Italy	1401	1330	1500	-5.07	12.78
Luxemburg	158	160	160	1.27	0.00
Netherlands	200	200 *	200 *	0.00	0.00
Portugal	809	848	853	4.82	0.59
United Kingdom	7280	7500	7400	3.02	-1.33
COMMUNITY	22431	22622	22391	0.85	-1.02
B. COKE					
Belgium	148	130	130	-12.16	0.00
Denmark	37	36	36	-2.70	0.00
Germany	856	800	800	-6.54	0.00
Spain	475	295	300	-37.89	1.69
France	669	630	600	-5.83	-4.76
Greece	10	20	20	100.00	0.00
Ireland	4	11	8	175.00	-27.27
Italy					
Luxemburg					
Netherlands	100	0	0	-100.00	
Portugal	24	24	24	0.00	0.00
United Kingdom	200	200 *	200 *	0.00	0.00
COMMUNITY	2523	2146	2118	-14.94	-1.30

* Estimations of the Commission of the European Communities

TABLE 8

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

04-Feb-92

('000 TONNES)

1990 : Actual 1991 : Provisional 1992 : Forecasts		BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
A. HARD COAL, PATENT FUELS, COKE														
Hard coal	1990	706	237	756	464	1690		644	168	1	12	1	5100	9779
	1991	705	250	750	445	1820		644		1		1	4600	9216
	1992	675	225	690	480	1770		620		1		1	4600	9062
Patent fuels	1990	30		391	5	640					5		1550	2621
	1991	35		540		760							1200	2535
	1992	35		530		700							1200	2465
Coke	1990	20	3	629		160	1		85				480	1378
	1991	20	4	660		50				1			500 *	1235
	1992	20	4	580		50				1			500 *	1155
Total	1990	756	240	1776	469	2490	1	644	253	1	17	1	7130	13778
	1991	760	254	1950	445	2630	0	644	0	2	0	1	6300	12986
	1992	730	229	1800	480	2520	0	620	0	2	0	1	6300	12682
% 1991/1990		0.5	5.8	9.8	-5.1	5.6	-100.0	0.0	-100.0	100.0	-100.0	0.0	-11.6	-5.7
% 1992/1991		-3.9		-7.7	7.9	-4.2		-3.7		0.0			0.0	-2.3
B. LIGNITE BRIQUETTES AND PEAT BRIQUETTES	1990	32	6	1300		67	50	450		20	12			1937
	1991	70	3	1535		50		333		12				2003
	1992	70	3	1300		50		333		12				1768

* Forecasts of the Commission of the European Communities

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TABLE 9

DELIVERIES OF LIGNITE AND PEAT BY SECTOR AND BY MEMBER STATE

04-Feb-92

(MILLION TONNES)

1990 : Actual 1991 : Provisional 1992 : Forecasts	RAW PRODUCTS											
	POWER STATIONS			BRIQUETTING PLANTS			OTHERS			TOTAL		
	1990	1991	1992	1990	1991	1992	1990	1991	1992	1990	1991	1992
BELGIQUE	-	-	-	-	-	-	-	0.3	0.3	0.0	0.3	0.3
DANMARK	-	-	-	-	-	-	-	-	-	0.0	0.0	0.0
DEUTSCHLAND (a)	93.4	95.4	97.5	14.6	15.8	15.5	1.6	1.5	1.5	109.6	112.6	114.5
ESPANA	16.6	16.0	16.0	-	-	-	-	-	-	16.6	16.0	16.0
FRANCE	1.9	1.7	1.6	-	-	-	0.3	0.3	0.3	2.2	2.0	1.9
HELLAS	50.5	51.0	53.0	0.4	0.4	0.4	1.5	0.6	0.6	52.5	52.0	54.0
IRELAND	3.5	3.6	3.6	1.3	1.0	1.0	2.2	2.1	2.1	7.0	6.7	6.6
ITALIA	1.6	1.5	1.5	-	-	-	0.0	0.0	0.0	1.6	1.5	1.5
LUXEMBOURG	-	-	-	-	-	-	-	0.0	0.0	0.0	0.0	0.0
NEDERLAND	-	-	-	-	-	-	-	-	-	0.0	0.0	0.0
PORTUGAL	-	-	-	-	-	-	-	-	-	0.0	0.0	0.0
UNITED KINGDOM	-	-	-	-	-	-	-	-	-	0.0	0.0	0.0
COMMUNITY	167.5	169.2	173.1	16.3	17.2	16.9	5.6	4.8	4.8	189.4	191.1	194.8

(a) figures for the old Lander only

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TABLE 10

HARD COAL PRODUCTION BY AREA

04-Feb-92 ('000 TONNES)

	1990	1991	1992
KEMPEN	1068	635	370
BELGIUM	1068	635	370
RUHR	60498	57200	58200
AACHEN	3866	3500	3200
IBBENBUREN	2074	2000	2000
SAAR + KLEINZECHEN	10115	9850	9200
GERMANY	76553	72550	72600
CENTRAL ASTURIANA	4554	4433	4290
BIERZO, VILLABLINO, NARCEA	5807	5866	6150
LEON, PALENCIA	2406	2070	2110
SUR	1976	1991	2080
ARAGON,CATALUNA, BALEARES	4697	4540	4370
SPAIN	19440	18900	19000
NORD-PAS-DE-CALAIS	232	0	0
LORRAINE	8360	8386	8200
CENTRE-MIDI	1895	1364	1500
FRANCE	10487	9750	9700
IRELAND	45	6	6
ITALIA	60	20	
PORTUGAL	266	270	270
SCOTLAND	2073	2200	NA
NORTH-EAST	9519	7900	NA
YORKSHIRE	23408	26600	NA
NOTTINGHAMSHIRE	16963	17000	NA
MIDLANDS (*)	19303	16800	NA
BC OPENCAST	16693	16000	15500
LICENSED MINES + OPENCAST	2115	2800	3000
UNITED KINGDOM	90074	90000	84500
E U R 1 2	197993	192131	186446

(*) Consists of the old NW, Midlands and South Wales regions (with Nottingshire extracted from the old Midlands region)

TABLE 11 A

COKE PRODUCTION

04-Feb-92 (MILLION T PER ANNUM)

	Coke production capacity	% difference compared with the previous year	Hard coal consumption	Coke production
1990 : Actual				
BELGIQUE	6.0	0.00	7.1	5.4
DEUTSCHLAND	19.4	-2.02	22.9	17.6
ESPANA	3.8	0.00	4.5	3.2
FRANCE	7.5	0.00	9.6	7.2
ITALIA	9.7	-3.00	8.6	6.4
NEDERLAND	3.1	0.00	4.0	2.7
PORTUGAL	0.3	0.00	0.4	0.2
UNITED KINGDOM (a)	8.4	1.20	11.2	8.1
COMMUNITY	58.3	-0.68	68.3	50.8
1991 : Provisional				
BELGIQUE	5.4	-10.00	6.7	5.1
DEUTSCHLAND	17.7	-8.76	20.5	15.9
ESPANA	3.8	0.00	4.2	3.4
FRANCE	7.5	0.00	8.5	6.4
ITALIA	8.6	-11.34	7.8	5.6
NEDERLAND	3.1	0.00	3.8	2.8
PORTUGAL	0.4	33.33	0.3	0.2
UNITED KINGDOM (a)	8.5	1.19	9.5	7.0
COMMUNITY	54.9	-5.83	61.2	46.4
1992 : Forecasts				
BELGIQUE	5.4	0.00	6.7	5.1
DEUTSCHLAND	17.1	-3.39	18.8	14.6
ESPANA	3.8	0.00	4.3	3.4
FRANCE	7.5	0.00	8.5	6.4
ITALIA	8.6	0.00	8.2	5.8
NEDERLAND	3.1	0.00	3.8	2.8
PORTUGAL	0.4	0.00	0.3	0.3
UNITED KINGDOM (a)	8.7	2.35	9.5	7.0
COMMUNITY	54.5	-0.73	60.1	45.4

(a) Without LTC for United Kingdom

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TABLE 11 B

COKING PLANT CAPACITY DISTRIBUTION

04-Feb-92 (Million tonnes)

	1990 Actual	1991 Provisional	1992 Forecasts
- Colliery plants	14.9	13.3	12.7
- Iron and steel industry	40.9	39.1	39.1
- Independent (*)	2.5	2.5	2.7
Total	58.3	54.9	54.5

* Without LTC for the United Kingdom

TABLE 12 A

PERSONNEL EMPLOYED UNDERGROUND
(yearly average)

04-Feb-92 ('000)

	1990 Actual	1991 Provisional	1992 Forecasts
Belgium	1.6	0.9	0.4
Germany	88.5	83.7	79.8
Spain	33.0	31.5	29.3
France	9.8	8.0 *	NA
Portugal	0.6	0.6 a	0.6 a
United Kingdom	53.3	46.6	39.3
Ireland	0.3	0.0	0.0
COMMUNITY	187.1	171.3	149.4

* Estimations of the Commission of the European Communities
(a) Carbonifera do Douro

TABLE 12 B

OUTPUT PER MAN/HOUR UNDERGROUND

07-Feb-92 (Kg per man/hour)

	1990	1991	1992
	Actual	Provisional	Forecasts
Belgium	361	382	430
Germany	673	695	NA
Spain	341	350 *	355 *
France	634	780 *	NA
Portugal	NA	NA	NA
United Kingdom	704	783	855
COMMUNITY	628.0	660	NA

NA : Not available

Estimate of the Commission of the European Communities

TABLE 13

INVESTMENTS IN THE COAL INDUSTRY
(COAL EXTRACTION AND PREPARATION)

07-Feb-92 (million ECU)

	1990	1991	1992
	Actual	Provisional	Forecasts
Belgium	20.0		
Germany	274.7	313.7	204.2
Spain	211.5	191.8	165.6
France	42.9	39.5	26.1
Italy	54.8	78.1	55.4
Portugal	0.7	0.6	0.3
United Kingdom	451.6	314.3	258.6
COMMUNITY	1056.2	938.0	710.2

TABLE 14

Exchange rates : US $ - European currencies

31-Jan-92

1 US Dollar =	BFR	DKR	DM	DRA	PTA	FF	IRL	LIT	HFL	ESC	UKL	ECU
1990												
1st.quarter	35.2851	6.5163	1.69074	159.454	109.114	5.73449	0.637090	1254.28	1.90547	149.119	0.603609	0.829284
2nd.quarter	34.6112	6.3940	1.67816	164.074	104.978	5.64385	0.625972	1232.56	1.88836	148.074	0.596984	0.818209
3rd.quarter	32.7742	6.0802	1.59325	156.548	98.670	5.34238	0.593886	1176.96	1.79531	140.710	0.537203	0.771300
4th.quarter	30.9872	5.7575	1.50157	153.589	95.041	5.06103	0.561664	1128.63	1.69344	132.581	0.513998	0.731690
YEAR 1990	33.4144	6.1870	1.61593	158.416	101.950	5.44544	0.604653	1198.11	1.82064	142.621	0.562948	0.787621
1991												
1st.quarter	32.3658	6.0404	1.57233	169.006	97.917	5.34216	0.589485	1175.12	1.77243	138.100	0.535424	0.765850
2nd.quarter	35.6929	6.6555	1.73497	189.150	107.579	5.87723	0.648523	1287.80	1.95468	151.150	0.586022	0.842838
3rd.quarter	35.8973	6.7375	1.74341	192.181	109.153	5.92505	0.651988	1301.71	1.96452	149.904	0.593679	0.849479
4th.quarter	33.1358	6.2543	1.60900	182.820	101.979	5.49566	0.603630	1211.71	1.81300	141.123	0.559144	0.788326
YEAR 1991	34.2729	6.4219	1.66493	183.289	104.157	5.66002	0.623407	1244.09	1.87616	145.069	0.568567	0.811623
% Difference												
4th.Qu.91/4th.Qu.90	6.93%	8.63%	7.15%	19.03%	7.30%	8.59%	7.47%	7.36%	7.06%	6.44%	8.78%	7.74%
Year 1991/Year 1990	2.57%	3.80%	3.03%	15.70%	2.16%	3.94%	3.10%	3.84%	3.05%	1.72%	1.00%	3.05%

13:58:56

TABLE 15 A

AVERAGE CIF PRICES FOR COAL IMPORTED FROM THIRD COUNTRIES

(US $)

	1 9 9 0				1 9 9 1			
	1Q/1990	2Q/1990	3Q/1990	4Q/1990	1Q/1991	2Q/1991	3Q/1991	4Q/1991
A. STEAM COAL (1)								
NCV (Kj/Kg)	26078	26469	26443	26546	26367	26463	26554	
- per tonne (t=t)	47.21	48.27	49.81	50.13	46.95	46.12	46.14	0.00
- per tonne = 29.3 GJ	53.05	53.45	55.21	55.34	52.18	51.08	50.92	
B. COKING COAL (2)								
NCV (Kj/Kg)	29386	29386	29386	29386	29386	29386	29386	29386
- per standard tonne (3) (4)	57.80	59.00	59.40	59.80	60.40	59.70	58.90	59.20
- per tonne = 29.3 GJ	57.65	58.85	59.25	59.65	60.25	59.55	58.75	59.05
Ratio B/A (%) per tonne = 29.3 GJ	108.67%	110.10%	107.32%	107.79%	115.47%	116.58%	115.38%	

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

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

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

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

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

TABLE 15 B

COKING COAL IMPORTS

GUIDE PRICE IN NATIONAL CURRENCIES PER TONNE OF 29.3 GJ, NEW REFERENCE GRADE

30-Jan-92

Reference date	USD	BFR	DKR	DM	DRA	PTA	FF	IRL	LIT	HFL	ESC	UKL	ECU
1990													
1st.quarter	57.80	2039	376.64	97.72	9216	6307	331.45	36.82	72497	110.14	8619	34.89	47.933
2nd.quarter	59.00	2042	377.24	99.01	9680	6194	332.99	36.93	72721	111.41	8736	35.22	48.274
3rd.quarter	59.40	1947	361.16	94.64	9299	5861	317.34	35.28	69912	106.64	8358	31.91	45.815
4th.quarter	59.80	1853	344.00	90.00	9185	5683	303.00	34.00	67492	101.00	7928	31.00	44.000
1991													
1st.quarter	60.40	1955	364.84	94.97	10208	5914	322.67	35.60	70977	107.06	8341	32.34	46.257
2nd.quarter	59.70	2131	397.33	103.58	11292	6422	350.87	38.72	76882	116.69	9024	34.99	50.317
3rd.quarter	58.90	2114	396.84	102.69	11319	6429	348.99	38.40	76671	115.71	8829	34.97	50.034
4th.quarter	59.20	1962	370.25	95.25	10823	6037	325.34	35.73	71733	107.33	8354	33.10	46.669
% Difference													
4th.Qu.91/4th.Qu.90	2.42%	-3.82%	-1.70%	-2.53%	17.43%	-4.27%	-1.84%	-2.96%	-1.05%	-2.55%	-3.07%	-5.12%	-2.64%

09:41:26

14EN.91

TABLE 15 C

STEAM COAL IMPORTS

AVERAGE PRICE IN NATIONAL CURRENCIES PER TONNE OF 29.3 GJ

30-Jan-92

Reference date	USD	BFR	DKR	DM	DRA	PTA	FF	IRL	LIT	HFL	ESC	UKL	ECU
1990													
1st.quarter	53.05	1872	345.69	89.69	8459	5788	304.21	33.80	66539	101.09	7911	32.02	43.994
2nd.quarter	53.45	1850	341.76	89.70	8770	5611	301.66	33.46	65880	100.93	7915	31.91	43.733
3rd.quarter	55.21	1809	335.69	87.96	8643	5448	294.95	32.79	64980	99.12	7769	29.66	42.583
4th.quarter	55.34	1715	318.62	83.10	8500	5260	280.08	31.08	62458	93.72	7337	28.44	40.492
1991													
1st.quarter	52.18	1689	315.19	82.04	8819	5109	278.75	30.76	61318	92.49	7206	27.94	39.962
2nd.quarter	51.08	1823	339.96	88.62	9662	5495	300.21	33.13	65781	99.84	7721	29.93	43.052
3rd.quarter	50.92	1828	343.07	88.77	9786	5558	301.70	33.20	66283	100.03	7633	30.23	43.255
4th.quarter													
% Difference													
3rd.Qu.91/3rd.Qu.90	-7.77%	1.02%	2.20%	0.92%	13.22%	2.03%	2.29%	1.25%	2.01%	0.92%	-1.74%	1.93%	1.58%

15:19:59

16EN.91

TABLE 16

DELIVERED PRICE FOR DOMESTIC COAL

(INCLUDING TAXES) (ECU/TCE)

06-Jan-92

		BELGIQUE	DEUTSCH-LAND	ESPANA	FRANCE	IRELAND	ITALIA	NEDERLAND	UNITED KINGDOM
1-1-1990	PRICE	258.7937	283.3325	154.1234	321.5349	188.6051	286.1053	310.7942	209.0479
	EXCHANGE RATE ECU/ NATIONAL CURRENCIES	42.6225	2.02565	131.044	6.92436	0.768931	1518.64	2.28802	0.739198
1-1-1991	PRICE	257.4251	285.2849	155.9806	332.1714	177.1950	289.1515	316.4738	223.8408
	EXCHANGE RATE ECU/ NATIONAL CURRENCIES	42.1944	2.04372	130.389	6.95237	0.768315	1539.95	2.30567	0.706217
% Difference		-0.53%	0.69%	1.20%	3.31%	-6.05%	1.06%	1.83%	7.08%

11:44:13

TABLE 17

WORLD COAL PRODUCTION AND TRADE

(Million tonnes)

I. WORLD TRADE BY COUNTRY AND REGION	1989	1990	1991 (1)	1992 (2)
COMMUNITY IMPORTS FROM THIRD COUNTRIES	103	116	129	131
IMPORTS, JAPAN	102	103	109	111
IMPORTS, NIC-ASIA (3)	52	52	55	56
IMPORT, OTHER COUNTRIES	66	71	76	82
SUBTOTAL COAL SEA-BORNE TRADE (a)	323	342	369	380
COKING COAL	163	160	160	164
OTHERS	160	182	209	216
INTECOMMUNITY COAL TRADE	9	10	8	6
INTRACOMECON TRADE (4)	38	34	28	25
USA-CANADA TRADE	15	15	7	7
SUBTOTAL REGIONAL TRADE (b)	62	59	43	38
TOTAL WORLD TRADE (c) = (a)+(b)	385	401	412	418
COKING COAL	184	183	183	185
OTHERS	201	218	229	233
DIFFERENCE FROM YEAR TO YEAR (%)	3.2	4.0	2.6	1.6
II. WORLD PRODUCTION OF COAL				
WESTERN EUROPE	209	199	192	
(EUR)	215	199	192	
MORTH AMERICA	837	893	878	
(UNITED STATES)	800	855	838	
(CANADA)	37	38	40	
USSR	577	537	480	
CHINA	1054	1066	1086	
POLAND	177	145	139	
SOUTH AFRICA	169	175	173	
AUSTRALIA	155	163	174	
INDIA	198	225	230	
JAPAN	10	8	6	
LATIN AMERICA	34	35	40	
REST OF THE WORLD	143	137	127	
TOTAL WORLD PRODUCTION OF COAL (d)	3563	3583	3525	
III. SEA BORNE TRADE OF COAL IN % OF WORLD PRODUCTION:(a)/(b)	9.1	9.5	10.5	

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

TABLE 18 A

IMPORTS OF HARD COAL FROM THIRD COUNTRIES

1989-1992

04-Feb-92 (Million tonnes)

	1989	1990	1991	1992
	Actual	Actual	Provisional	Forecasts
A. BY COUNTRY OF DESTINATION				
Belgium	10.9	13.2	12.6	12.9
Denmark	10.2	9.3	13.5	13.3
Germany	5.7	8.6	9.5	10.5
Greece	1.2	1.4	1.5	1.6
Spain	10.2	9.8	10.6	10.5
France	14.1	17.3	20.2	19.0
Ireland	2.8	2.8	2.7	2.5
Italy	19.4	19.5	18.9	20.9
Luxemburg	0.1	0.2	0.2	0.2
Netherlands	13.2	16.5	15.7	15.4
Portugal	3.4	4.5	4.1	4.2
United Kingdom	11.5	12.7	19.5	20.1
COMMUNITY	102.6	115.9	129.0	131.0
B. BY COUNTRY OF ORIGIN				
USA	41.7	45.2	50.6	50.6
Canada	2.7	3.3	3.8	3.7
Australia	13.7	16.3	20.1	21.3
South Africa	20.6	24.0	25.2	26.5
Poland	6.7	7.7	6.1	5.7
USSR	3.5	4.5	5.3	5.8
China	3.0	2.8	3.0	2.1
Colombia	8.7	8.4	10.1	10.2
Others	2.0	3.7	4.9	5.2
COMMUNITY	102.6	115.9	129.0	131.0

IMPO012

TABLEAU IMPORTATION DE HOUILLE EN PROVENANCE DES PAYS TIERS

TABLE 188 COAL IMPORTS FROM THIRD COUNTRIES

TABELLE EINFUHR VON KOHLE AUS DRITTLAENDERN

04-Feb-92 ('000 T)

Origine/Origin/Herkunft / Destination/Bestimmung	U.S.A	Canada	Australia	South Africa	Poland	URSS	China	Colombia	Other countries	All countries
1991										
BELGIQUE	5760	225	1485	3820	405	310	345	165	55	12570
DANMARK	4760	931	2266	0	690	1640	115	2795	261	13458
DEUTSCHLAND	600	350	350	5200	1900	100	0	0	1000	9500
ESPANA	3400	0	900	5400	200	300	0	350	50	10600
FRANCE	8753	596	4406	935	230	876	1768	2052	624	20240
HELLAS	0	0	0	1100	0	400	0	0	0	1500
IRELAND	1370	0	6	74	420	16	5	30	760	2681
ITALIA	10238	360	975	4806	579	588	282	306	807	18941
LUXEMBOURG	0	0	0	140	0	80	0	0	0	220
NEDERLAND	6100	400	5300	1250	900	0	150	1400	200	15700
PORTUGAL	1601	116	59	1853	80	80	0	349	0	4138
UNITED KINGDOM	8000	800	4400	600	700	900	300	2700	1100	19500
E U R - 1 2	50582	3778	20147	25178	6104	5290	2965	10147	4857	129048
1992										
BELGIQUE	6060	225	1625	3780	375	285	360	165	50	12925
DANMARK	4689	917	2232		680	1616	113	2753	257	13257
DEUTSCHLAND	700	550	400	5800	1700	150	0	0	1200	10500
ESPANA	3500	0	950	5300	150	250	0	300	50	10500
FRANCE	9300	350	4400	860	130	460	1000	2100	400	19000
HELLAS	0	0	0	1100	0	500	0	0	0	1600
IRELAND	1255	0	6	74	410	16	5	30	740	2536
ITALIA	10228	250	1950	5111	660	1392	250	350	675	20866
LUXEMBOURG	0	0	0	140	0	80	0	0	0	220
NEDERLAND	5900	400	5000	1250	800	0	100	1200	700	15350
PORTUGAL	985	160	300	1918	100	120	0	600	0	4183
UNITED KINGDOM	8000	800	4400	1200	700	900	300	2700	1100	20100
E U R - 1 2	50617	3652	21263	26533	5705	5769	2128	10198	5172	131037

TABLEAU H O U I L L E ECHANGES INTRA-COMMUNAUTAIRES
TABLE 19A C O A L INTRA-COMMUNITY EXCHANGES 1992
TABELLE S T E I N K O H L E ECHANGES INTRA-COMMUNAUTAIRES

04-Feb-92 ('000 TONNES)

DE-FROM-VON / EN-TO-A	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	RECEPTIONS RECEIPT/BEZUG 0
BELGIQUE	0		1000		NA					450			1450
	0		1235		15					20		130	1400
DANMARK		0			NA								0
		0											152 a
DEUTSCHLAND	100		0		NA					1400			1500
	190		0		300					30		180	700
ESPANA	100		300	0	NA							50	450
	60		570	0	25					75		240	970
FRANCE	290		1000		0					250		300	1840
	70		700		0							230	1000
HELLAS					NA	0							0
						0							0
IRELAND					NA		0					250	250
	11	0	24	0	32	0	0	0		76	0	317	460
ITALIA			550		NA			0					550
			350		15			0					365 b
LUXEMBOURG	40				NA				0				40
	40		2						0				42
NEDERLAND	225		450		NA					0			675
	200		450							0			650
PORTUGAL	5				NA						0		5
										8	0		8
UNITED KINGDOM			100		NA		15			250		0	365
			200									0	200
EXPEDITIONS													
DELIVERIES	760		3400	0	546 *	0	15	0	0	2350	0	600	7671
LIEFERUNGEN	571	0	3531	0	387	0	0	0	0	209	0	1097	5947

1ERE LIGNE/ 1ST LINE/ 1.LINIE : EXPEDITEUR/SENDER/LIEFERLAND 2EME LIGNE/ 2ND LINE/ 2.LINIE : RECEPTION/RECEIVER/BEZUGSLAND

* Commission of the European Communities' forecast a : breakdown by country not available b : Forecast, estimate by country not available

TABLEAU HOUILLE ECHANGES INTRA-COMMUNAUTAIRES
TABLE 19 B COAL INTRA-COMMUNITY EXCHANGES 1991
TABELLE STEINKOHLE ECHANGES INTRA-COMMUNAUTAIRES

04-Feb-92 ('000 TONNES)

DE-FROM-VON / EN-TO-A	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	RECEPTIONS RECEIPT/BEZUG 0
BELGIQUE	0		1000		NA					450		80	1530
	0		1210		15					20		125	1370
DANMARK		0			NA							160	160
	1	0	41									178	220
DEUTSCHLAND	100		0		NA					1400		250	1750
	190		0		300					30		180	700
ESPANA	100		350	0	NA							210	660
	50		540	0	20					70		220	900
FRANCE	300		1245							250		320	2115
	176		1556	9				31		216	2	387	2377
HELLAS					NA	0							0
						0							0
IRELAND			5		NA		0					250	255
	10	0	23	0	31	0	0	0		76	0	322	462
ITALIA			450		NA			0					450
			478					0					478
LUXEMBOURG	40				NA				0				40
	40		2						0				42
NEDERLAND	240		350		NA					0		10	600
	200		450							0			650
PORTUGAL	5				NA						0	120	125
										8	0	140	148
UNITED KINGDOM			200		NA		20			250		0	470
			200									0	200
EXPEDITIONS													
DELIVERIES	785		3600	0	468 *	0	20	0	0	2350	0	1400	8623
LIEFERUNGEN	667	0	4500	9	366	0	0	31	0	420	2	1552	7547

1ERE LIGNE/ 1ST LINE/ 1.LINIE : EXPEDITEUR/SENDER/LIEFERLAND
2EME LIGNE/ 2ND LINE/ 2.LINIE : RECEPTION/RECEIVER/BEZUGSLAND

* Forecasts of the Commission of the European Communities

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TABLEAU COKE DE FOUR ECHANGES INTRA-COMMUNAUTAIRES

TABLE 20 A COKE OVEN COKE INTRA-COMMUNITY EXCHANGES 1992

TABELLE STEINKOHLENKOKS ECHANGES INTRA-COMMUNAUTAIRES

04-Feb-92

('000 TONNES)

DE-FROM-VON	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	RECEPTIONS RECEIPT/BEZUG
EN-TO-A	0	0	0	0	0	0	0	0	0	0	0	0	0
BELGIQUE	0		40		NA					350		34 *	424
	0		95		15					310			420
DANMARK	0	0			NA							33 *	33
		0											40 a
DEUTSCHLAND	365		0		NA			9		100			474
	280		0		75					45			400
ESPANA				0	NA			5					5
			15	0	20							15	50
FRANCE	120		120		0			30		200			470
	300		300		0					200			800
HELLAS					NA	0		21					21
						0		10					10
IRELAND					NA		0						0
	13	0	0	0	0	0	0	0	0	5	0	2	20
ITALIA	15		100		NA			0		50			165
								0					0
LUXEMBOURG	220		1000		NA				0				1220
	240		1040						0				1280
NEDERLAND	30		40		NA					0		33 *	103
	50		100		50					0			200
PORTUGAL					NA						0		0
				6	2						0		8
UNITED KINGDOM					NA					50		0	50
			75							25		0	100
EXPEDITIONS													
DELIVERIES	750	0	1300	0	336 b	0	0	65	0	750	0	100	3301
LIEFERUNGEN	883	0	1625	6	162	0	0	10	0	585	0	17	3328

1ERE LIGNE/ 1ST LINE/ 1.LINIE : EXPEDITEUR/SENDER/LIEFERLAND 2EME LIGNE/ 2ND LINE/ 2.LINIE : RECEPTION/RECEIVER/BEZUGSLAND

* Commission of the European Communities' forecast a : breakdown by country not available b : forecast, estimate by country not available

TABLEAU — COKE DE FOUR — ECHANGES INTRA-COMMUNAUTAIRES
TABLE 20 B — COKE OVEN COKE — INTRA-COMMUNITY EXCHANGES — 1991
TABELLE — STEINKOHLENKOKS — ECHANGES INTRA-COMMUNAUTAIRES

04-Feb-92 ('000 TONNES)

DE-FROM-VON / EN-TO-A	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	RECEPTIONS RECEIPT/BEZUG 0
BELGIQUE	0		40		NA					350		34 *	424
	0		95		15					310			420
DANMARK	0	0			NA							33 *	33
	10	0	2	1								27	40
DEUTSCHLAND	365		0		NA			3		100			468
	250		0		60			1		37		2	350
ESPANA			5	0	NA			7					12
			10	0	20							15	45
FRANCE	120		100		0			35		200			455
	360		540		0					300			1200
HELLAS	0				NA	0		4					4
						0		10					10
IRELAND					NA		0						0
	13	0	2	0	0	0	0	0	0	5	0	2	22
ITALIA	15		200		NA			0		50			265
								0					
LUXEMBOURG	220		1000		NA				0				1220
	240		1041						0				1281
NEDERLAND	30		55		NA					0		33 *	118
	50		100		50					0			200
PORTUGAL					NA						0		0
				6	2						0		8
UNITED KINGDOM					NA					50		0	50
			75							25		0	100
EXPEDITIONS													
DELIVERIES	750	0	1400	0	264 b	0	0	49	0	750	0	100	3313
LIEFERUNGEN	923	0	1865	7	147	0	0	11	0	677	0	46	3676

1ERE LIGNE/ 1ST LINE/ 1.LINIE : EXPEDITEUR/SENDER/LIEFERLAND — 2EME LIGNE/ 2ND LINE/ 2.LINIE : RECEPTION/RECEIVER/BEZUGSLAND

* Commission of the European Communities' forecast a : breakdown by country not available b : Forecast, estimate by country not available

TALEAU - TABLE - TABLELLE 21

S T O C K S - B E S T A E N D E

05-Mar-92

('000 TONNES)

	PRODUCTEURS-PRODUCERS-PRODUZENTEN (HOUILLE - HARDCOAL - STEINKOHLE)			CENTRALES - POWER - OFFENTLICHE ELECTRIQUES-STATIONS-KRAFTWERKE			COKERIES-COKING PLANTS-KOKEREIEN (COKE - COKE - KOKSKOHLE)			COKERIES-COKING PLANTS-KOKEREIEN (HOUILLE - HARDCOAL - STEINKOHLE)		
	(A) 31-12-90	(B) 31-12-91	(B) 31-12-92	(A) 31-12-90	(B) 31-12-91	(B) 31-12-92	(A) 31-12-90	(B) 31-12-91	(B) 31-12-92	(A) 31-12-90	(B) 31-12-91	(B) 31-12-92
BELGIQUE	92	92	92	657	600	600	126	127	127	423	425	425
DANMARK				7922	8318	8158	0	0	0			
DEUTSCHLAND (1)	17354	16963	17790	14350	14200	14000	4207	3750	2400	267	280	250
ESPANA	1448	1490	1490	9005	8964	8500	96	82	115	681	421	320
FRANCE	2135	NA	NA	2730	NA	NA	476	NA	NA	820	NA	NA
HELLAS							0	0	0			
IRELAND	20			477	477	469	0	0	0			
ITALIA				1600	1500		120	180	0	900	900	
LUXEMBOURG							0	0	0			
NEDERLAND	0	0	0	1762	NA	NA	35	NA	NA		NA	NA
PORTUGAL	2	4	4	979	1035	1005	34	38	42	116	116	87
UNITED KINGDOM	9146 *	9200 *	7400 *	26905			277	0	0	1564		
E U R 1 2	30197	NA	NA	66387	NA	NA	5371	NA	NA	4771	NA	NA

(A) REALISATIONS - ACTUAL - ERGEBNISSE (B) DECLARATIONS - RETURNS - MELDUNGEN

* EXCLUDING LOW GRADE

HARD012

TABLE 22

HARD COAL BALANCE SHEET FOR 1992

04-Feb-92

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
1. PRODUCTION (t=t)	370		72600	19000	9700	0	6	0	0	0	270	84500	186446
2. RECOVERIES	1100		1300	180		0	0	0	0	0	0	500	3080
3. ARRIVALS FROM ECSC COUNTRIES	1400	152	700	970	1000	0	460	365	42	650	8	200	5947
4. IMPORTS FROM THIRD COUNTRIES	12925	13257	10500	10500	19000	1600	2536	20866	220	15350	4183	20100	131037
5. AVAILABILITIES (1+2+3+4)	15795	13322	85100	30650	29700	1600	3002	21231	262	16000	4461	105300	320563
6. INTERNAL DELIVERIES (TOTAL)	15035	13483	79200	30650	29850	1600	2933	21231	262	13650	4461	106400	318755
A. COLLIERY POWER STATIONS	85	0	1800	0	4000	0	0		0	0	0	0	5885
B. PUBLIC POWER STATIONS	5910	12683	46800	22800	9500	200	1900	10000	0	8700	3262	82000	203755
C. COKE OVENS	6700	0	18800	4300	8500	0	0	8182	0	3800	345	9500	60127
D. STEEL INDUSTRY	650	0	2400	400	1700	80	0	750	101	0	0	500	6581
(OF WHICH POWER STATIONS)	(-)	(-)	(-)	(-)	80	(-)	(-)	(-)	(-)	(-)	(-)	(-)	80
E. OTHER INDUSTRIES	1000	475	7700	2570	3800	1320	413	1500	160	200 *	853	7400	27391
(OF WHICH POWER STATIONS)	(-)	(-)	5000	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	5000
F. DOMESTIC SECTOR	675	225	600	380	1750	0	620		1	0	1	4000	8252
G. MISCELLANEOUS (TOTAL) OF	15	100	1100	200	600	0	0	799	0	950 *	0	3000	6764
WHICH : 1. ISSUES TO WORKERS	(-)	(-)	90	100	20	(-)	(-)	(-)	(-)	(-)	(-)	600	810
2. PATENT FUEL	10	(-)	790	(-)	480	(-)	(-)	(-)	(-)	(-)	(-)	1400	2680
3. OWN CONSUMPTION	5	(-)	70	100	100	(-)	(-)	(-)	(-)	(-)	(-)	100	375
4. GASWORKS	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	0
5. RAILWAYS	(-)	(-)	50	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	50
6. OTHERS	(-)	100	100	(-)	(-)	(-)	(-)	799	(-)	950 *	(-)	900	2849
7. DELIVERIES TO ECSC	760	0	3400	0	546 *	0	15	0	0	2350	0	600	7671
8. EXPORTS TO NON MEMBER COUNTRIES	0	40	100	0	104 *			0	0	0	0	0	244
9. TOTAL DELIVERIES (6+7+8)	15795	13523	82700	30650	30500	1600	2948	21231	262	16000	4461	107000	318999
10. MOVEMENTS OF PRODUCERS' AND IMPORTERS' STOCKS (5-9)	0	-201	2400	0	-800	0	54	0	0	0	0	-1700	1564

* Forecasts of the Commission of the European Communities

TABLE 23

HARD COAL BALANCE SHEET FOR 1991

04-Feb-92

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
1. PRODUCTION (t=t)	635	0	72550	18900	9750	0	6	20	0	0	270	90000	192131
2. RECOVERIES	1150	0	1500	170		0	0	0	0	0	0	1800	4620
3. ARRIVALS FROM ECSC COUNTRIES	1370	220	700	900	2377	0	462	478	42	650	148	200	7547
4. IMPORTS FROM THIRD COUNTRIES	12570	13458	9500	10600	20240	1500	2681	18941	220	15700	4138	19500	129048
5. AVAILABILITIES (1+2+3+4)	15725	13678	84250	30570	32367	1500	3149	19439	262	16350	4556	111500	325799
6. INTERNAL DELIVERIES (TOTAL)	14940	13181	79550	30470	30400	1500	3073	18933	262	13950	4554	109500	320313
A. COLLIERY POWER STATIONS	125	0	1970	0	3500	0	0	0	0	0	0	0	5595
B. PUBLIC POWER STATIONS	5740	12331	45430	22700	10500	100	2000	9400	0	9000	3431	85000	205632
C. COKE OVENS	6700	0	20450	4200	8500	0	0	7750	0	3800	274	9500	61174
D. STEEL INDUSTRY	650	0	2100	400	1500	80	0	100	101	0	0	500	5431
(OF WHICH POWER STATIONS)	(-)	(-)	(-)	(-)	80	(-)	(-)	(-)	(-)	(-)	(-)	(-)	80
E. OTHER INDUSTRIES	1005	500	7700	2630	4000	1320	429	1330	160	200 *	848	7500	27622
(OF WHICH POWER STATIONS)	(-)	(-)	5000	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	5000
F. DOMESTIC SECTOR	705	250	650	350	1800	0	644	0	1	0	1	4000	8401
G. MISCELLANEOUS (TOTAL) OF	15	100	1250	190	600	0	0	353	0	950 *	0	3000	6458
WHICH : 1. ISSUES TO WORKERS	(-)	(-)	100	95	20	(-)	(-)	(-)	(-)	(-)	(-)	600	815
2. PATENT FUEL	10	(-)	870	(-)	500	(-)	(-)	(-)	(-)	(-)	(-)	1400	2780
3. OWN CONSUMPTION	5	(-)	80	95	80	(-)	(-)	(-)	(-)	(-)	(-)	100	360
4. GASWORKS	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	0
5. RAILWAYS	(-)	(-)	80	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	80
6. OTHERS	(-)	100	120	(-)	(-)	(-)	(-)	353	(-)	950 *	(-)	900	2423
7. DELIVERIES TO ECSC	785		3600	0	468 *	0	20	0	0	2350	0	1400	8623
8. EXPORTS TO NON MEMBER COUNTRIES	0	50	150	0	132 *			0	0	50	0	300	682
9. TOTAL DELIVERIES (6+7+8)	15725	13231	83300	30470	31000	1500	3093	18933	262	16350	4554	111200	320995
10. MOVEMENTS OF PRODUCERS' AND IMPORTERS' STOCKS (5-9)	0	447	950	100	1367	0	56	506	0	0	2	300	4804

* Forecasts of the Commission of the European Communities

KE012

TABLE 24

COKE BALANCE SHEET FOR 1992

04-Feb-92

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
1. PRODUCTION	5100	0	14600	3400	6400	0	0	5819	0	2800	260	7000	45379
2. RECEIPTS FROM ECSC COUNTRIES	420	40 *	400	50	800	10	20		1280	200	8	100	3328
3. IMPORTS FROM THIRD COUNTRIES	380	0	300	50	100	30	0	5	88	100	0	100	1153
4. AVAILABILITIES (1+2+3)	5900	40	15300	3500	7300	40	20	5824	1368	3100	268	7200	46532
5. INLAND DELIVERIES (TOTAL)	5100	40	15250	3500	6810	40	20	5598	1368	2300	264	7000	47290
A. STEEL INDUSTRY	4945		13600	3200	6000	20	12	5149	1367	2300	240	6100 *	42933
B. OTHER INDUSTRIES	130	36	800	300	600	20	8				24	200 *	2118
C. DOMESTIC SECTOR	10	4	280		50				1		0	500 *	845
D. MISCELLANEOUS OF WHICH :	15	0	570	0	160	0	0	449	0	0	0	200 *	1394
- ISSUES TO WORKERS	10	(-)	300	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	310
- OWN CONSUMPTION	(-)	(-)	5	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	5
- OTHERS	5	(-)	265	(-)	160	(-)	(-)	449	(-)	(-)	(-)	200 *	1079
6. DELIVERIES TO ECSC COUNTRIES	750		1300		336 *	0		65		750	0	100	3301
7. EXPORTS TO THIRD COUNTRIES	50		100		64 *	0		161		50	0	100	525
8. TOTAL DELIVERIES (5+6+7)	5900	40	16650	3500	7210	40	20	5824	1368	3100	264	7200	47815
9. STOCK MOVEMENT AT PRODUCTION AND IMPORTS (4-8)	0	0	-1350	0	90	0	0	0	0	0	4	0	-1283

* Forecasts of the Commission of the European Communities

TABLE 25

COKE BALANCE SHEET FOR 1991

04-Feb-92

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
1. PRODUCTION	5100	0	15900	3400	6400	0	0	5570	0	2800	220	7000	46390
2. RECEIPTS FROM ECSC COUNTRIES	420	40	350	45	1200	10	22		1281	200	8	100	3676
3. IMPORTS FROM THIRD COUNTRIES	380	0	250	50	130	20	3	32	88	100	0	100	1153
4. AVAILABILITIES (1+2+3)	5900	40	16500	3495	7730	30	25	5602	1369	3100	228	7200	47543
5. INLAND DELIVERIES (TOTAL)	5100	40	15350	3495	6840	40	25	5432	1369	2300	224	7000	47215
A. STEEL INDUSTRY	4945		13600	3200	6000	20	14	4920	1368	2300	200	6100 *	42667
B. OTHER INDUSTRIES	130	36	800	295	630	20	11				24	200 *	2146
C. DOMESTIC SECTOR	10	4	300		50				1			500 *	865
D. MISCELLANEOUS OF WHICH :	15	0	650	0	160	0	0	512	0	0	0	200 *	1537
- ISSUES TO WORKERS	10	(-)	360	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	370
- OWN CONSUMPTION	(-)	(-)	5	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	5
- OTHERS	5	(-)	285	(-)	160	(-)	(-)	512	(-)	(-)	(-)	200 *	1162
6. DELIVERIES TO ECSC COUNTRIES	750	0	1400		264 *	0	0	49		750	0	100	3313
7. EXPORTS TO THIRD COUNTRIES	50	0	150		136 *	0	0	121		50	0	100	607
8. TOTAL DELIVERIES (5+6+7)	5900	40	16900	3495	7240	40	25	5602	1369	3100	224	7200	47822
9. STOCK MOVEMENT AT PRODUCTION AND IMPORTS (4-8)	0	0	-400	0	490	-10	0	0	0	0	4	0	-279

* Forecasts of the Commission of the European Communities

TABLE 26

LIGNITE AND PEAT BALANCE SHEET FOR 1992

04-Feb-92

	BELGIQUE	DANMARK	DEUTSCH-LAND a	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
A. RAW PRODUCT													
- AVAILABILITIES :	275	0	114500	16000	1950	54000	5640	1482	3	0	0	0	193850
PRODUCTION	0	0	112500	16000	1900	54000	5600	1450	0	0	0	0	191450
IMPORTS	275	0	2000	0	50	0	40	32	3	0	0	0	2400
- UTILIZATION :	275	0	114500	16000	1900	54000	6640	1482	3	0	0	0	194800
BRIQUETTING PLANTS		0	15500		0	400	1000			0	0	0	16900
POWER STATIONS		0	97500	16000	1600	53000	3550	1450		0		0	173100
OTHERS	275		1500	0	300	600	2090	32	3		0		4800
B. BRIQUETTES													
- AVAILABILITIES :	70	5	5650	400	50	150	400	100	12	0	0	0	6837
PRODUCTION	0	0	5300	0	0	150	400	0	0	0	0	0	5850
ARRIVAL FROM ECSC COUNTRIES	70	5	300 b	400	50	0		100	12				937
IMPORTS FROM NON-MEMBER COUNTRIES	0	0	50	0	0	0	0	0	0	0	0	0	50
- UTILIZATION :	70	6	5650	400	50	150	400	100	12	0	0	0	6838
POWER STATIONS	0		120	400	0	0		100	0		0		620
INDUSTRY	0	0	3310	0	0	100	21	0	0		0		3431
DOMESTIC	70	3	1300		50	0	333		12		0		1768
SHIPMENTS TO OTHER ECSC COUNTRIES			770 c			0							770
EXPORTS TO NON-MEMBER COUNTRIES			150										0
OTHERS	0	3	0	0	0	50	46		0	0			99

* Forecasts of the Commission of the European Communities

a : figures for the old Lander only b : imports from the new Lander c : includes an export of 0.1 miot to the new Lander

GN012

TABLE 27

LIGNITE AND PEAT BALANCE SHEET FOR 1991

04-Feb-92

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND a	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
A. RAW PRODUCT													0
- AVAILABILITIES :	275	0	112600	16000	2231	52000	5730	1525	3	0	0	0	190364
PRODUCTION	0	0	110400	16000	2181	52000	5700	1500	0	0	0	0	187781
IMPORTS	275	0	2200	0	50	0	30	25	3	0	0	0	2583
													0
- UTILIZATION :	275	0	112600	16000	1980	52000	6690	1525	3	0	0	0	191073
BRIQUETTING PLANTS		0	15750		0	400	1000			0	0	0	17150
POWER STATIONS	0	0	95350	16000	1700	51000	3600	1500		0	0	0	169150
OTHERS	275		1500	0	280	600	2090	25	3				4773
													0
B. BRIQUETTES													0
- AVAILABILITIES :	70	7	6075	400	50	150	400	120	12	0	0	0	7284
PRODUCTION	0	0	5730	0	0	150	400	0	0	0	0	0	6280
ARRIVAL FROM ECSC COUNTRIES	70	7	285 b	400	50	0		120	12				944
IMPORTS FROM NON-MEMBER													0
COUNTRIES	0	0	60	0		0	0	0	0	0	0	0	60
													0
- UTILIZATION :	70	6	6075	400	50	150	400	120	12	0	0	0	7283
POWER STATIONS	0		120	400	0	0		120			0		640
INDUSTRY		0	3260	0	0	100	21	0	0		0		3381
DOMESTIC	70	3	1535		50	0	333		12				2003
SHIPMENTS TO OTHER ECSC													0
COUNTRIES			950 c			0							950
EXPORTS TO NON-MEMBER													0
COUNTRIES			210										210
OTHERS	0	3		0	0	50	46		0	0			99

* Forecasts of the Commission of the European Communities

a : figures for the old Lander only b : imports from the new Lander c : includes an export of 0.1 miot to the new Lander