COMMISSION OF THE EUROPEAN COMMUNITIES

SEC(93) 1399 final Brussels, 23 September 1993

COMMISSION REPORT

THE MARKET FOR SOLID FUELS IN THE COMMUNITY IN 1992 AND THE OUTLOOK FOR 1993

(Revision*)

* Revision of Commission report SEC(93)441 final of 25.03.1993.

INDEX

List of tables

List of graphics

LIST OF ANNEXES

Commission report on:

The market for solid fuels in the Community in 1992 and the outlook for 1993.
(revision)

1. INTRODUCTION

This report summarises the results obtained in 1992 and gives the Member States' forecasts for 1993, on the basis of the information forwarded to the Commission in June 1993.

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

The report thus updates the information contained in the Commission's annual report on "The market for solid fuels in the Community in 1992 and the outlook for 1993"(1), which gave the forecasts made at the end of 1992 and in January 1993. At the end of the current year, a new report will be drawn up with the provisional results for 1993 and the outlook for 1994.

The information contained in this document, unless specified to the contrary, does not cover the new German Länder since the necessary data, in particular the forecasts for 1993, are largely unavailable.

It should also be noted that, when the main report was prepared in March 1993, forecasts for 1993 were not available for the United Kingdom. The Commission used the same figures for 1993 as those given for 1992. This situation has been rectified for this report, which accounts for some of the large discrepancies in the forecasts for 1993.

2. ECONOMIC SITUATION(2)

The Community economy is going through a very difficult period. The present situation in fact is characterised by falling levels of real output and employment, rapidly rising rates of unemployment and continued swelling budget deficits. In the second half of 1992, the previous two-year period of slow growth gave way to recession, with the EC output estimated to have fallen by 1/4% over that period. this figure compares with earlier expectations of positive growth of some 3/4%. Economic indicators such as capacity utilisation, industrial production, retail sales and order books remained at a very depressed level or declined further, suggesting and additional fall in GDP of the order of 3/4 to 1% during the first half of this year.

At present, there are no concrete signs of a recovery process emerging on the horizon. The fact that consumer and business confidence did not deteriorate further from the exceptionally

(1) SEC(93)441 final of 25.03.1993.
(2) Economic forecasts 1993. June 1993. CEC.

low levels recorded in the first quarter may constitute a silver liming. But confirmation is needed over the next months before heralding the onset of the recovery. The predominant view is that any upturn is still some way off. Hence, the hoped-for-recovery for the second half of this year is now tentatively delayed until mid-1994. As a result, following growth of a scant 1% in 1992, EC output is expected to decline - for the first time since 1975 - by half a percent in 1993. Employment is forecast to suffer the largest reduction in Community history. As a result, unemployment is expected to increase faster than previously projected and could reach 11 1/2% in 1993 on average. On the other hand, recession as well as discretionary fiscal measures in a number of countries are swelling the Community's budget deficit to 6 1/4% of GDP in 1993, easily exceeding the previous peak of 5,2% in 1982. Finally, despite the weakness of demand, only modest progress is being made in reducing inflation, which could still average 4 1/4% in 1993.

The deterioration in the Community's growth performance is not due to one single contributory factor, but would appear to reflect a weakness in all the major components of demand, both domestic and external. Any recovery in short-term prospects would seem therefore to be crucially dependent on an improvement in the relatively depressed world economy, a strengthening in the Community's underlying competitiveness and a rebound in business and consumer confidence.

The table below shows the main features of the Commission services Summer 1993 forecasts together with some indications on the size of the revisions.

MAIN FEATURES OF THE ECONOMIC FORECASTS - EC[a)]			
	1992 estimates	forecasts for 1993	
		Previous (Jan 1993)	Latest (June 1993)
GDP growth[b)]	1.1	0.8	-0.4
Total investment[b)]	0.1	-0.5	-1.9
Employment[b)]	-1.3	-0.8	-1.7
Unemployment rate	10.1	11.0	11.5
Inflation[c)]	4.6	4.5	4.2
Budget deficit[d)]	-5.1	-5.5	-6.3

a) EC including the five new German Länder.
b) Real % change per annum.
c) Deflator of private consumption; % change per annum.
d) General government, as % of GDP.

3. COMMUNITY ENERGY MARKET.

According to the data available, total primary energy demand (in terms of gross inland consumption) in the Community during 1992 (including the new German Länder) appears to have decreased by 0.6% compared to 1991. Demand for oil only increased by 1%, but demand for natural gas, influenced by the benign weather conditions, was roughly at its 1991 level (+0.2%) whilst demand for hard coal and lignite decreased by 5.0% and 10.2% respectively, the latter being heavily influenced by the restructuring of the lignite industry in eastern Germany. Taken together, solid fuels decreased by some 6.3%.

Slow economic growth is the main factor explaining this behaviour in demand, but other contributing factors were the significantly warmer weather in 1992 compared to 1991 and the continuing restructuring of the eastern German energy sector.

* GROSS INLAND CONSUMPTION - EC - (million toe)	1991	1992	1992/1991 (%)	share in 1992 (%)
Hard coal	204.2	194.0	-5.0	16.2
Lignite	70.9	63.7	-10.2	5.3
TOTAL SOLID FUELS	275.1	257.7	-6.3	21.5
OIL	520.2	525.5	1.0	43.9
NATURAL GAS	231.0	231.4	0.2	19.3
NUCLEAR	160.0	163.5	2.2	13.6
OTHERS	19.7	20.0	1.7	1.7
TOTAL	1206.0	1198.2	-0.6	100.0

* Including the new German Länder

Globally for 1993, the expected contraction in GDP could result in a more pronounced decrease in total energy demand than occurred during 1992. In addition, should the mild weather conditions observed until mid-1993 continue for the rest of the year, this could accentuate the decline expected for 1993. Solid fuels, both lignite and hard coal, are likely to be the energy sources most touched by such a contraction in demand.

4. HARD COAL MARKET.

The revised forecasts for hard coal during 1993 point to a significant decrease. In fact, deliveries for 1993 are the lowest ever seen in the Community (with the exception of 1984, which was due to the exceptional circumstances of the miners' strike in the United Kingdom). Total deliveries are expected to be 282.7 Mt, which is 27.2 Mt or 8.8% lower than the 1992 figure.

On the supply side, Community production is expected to decrease by 25.4 Mt (-13.8%) to 159.2 Mt. Similarly, hard coal imported from third countries could drop, for the first time for many years, to 120.7 Mt (-12.5 Mt; -9.4%). Taken altogether, and including recoveries, the forecasts point to the total resources available being 283.3 Mt, compared to 323.2 Mt in 1992.

Despite this drop in production and imports of hard coal, total resources are 0.5 Mt higher than the expected deliveries to the consuming sectors.

The coke market continues to decline, as in the previous year; a trend which could be aggravated by the contraction of the economy.

Also the lignite market, even when excluding the new German Länder, is likely to suffer a certain level of decline, mainly as a result of the lower demand from power plants.

COMPARISON OF THE MAIN FEATURES OF THE SOLID FUEL MARKET (million tonnes)**						
	1992 previous	1992 actual	1993 previous	1993 actual	1993 actual/ previous(%)	1993/92 (%)
HARD COAL						
Resources						
- Production	183.7	184.6	174.7	159.2	-8.9	-13.8
- Recoveries	7.6	5.3	5.9	3.4	-42.6	-36.1
- Imports from third countries	131.3	133.2	126.3	120.7	-4.5	-9.4
Total	**322.6**	**323.2**	**307.0**	**283.3**	**-7.7**	**-12.4**
Deliveries						
- To coking plants	58.9	58.3	56.7	55.0	-3.0	-5.7
- To power stations*	209.4	209.5	210.8	185.9	-11.8	-11.3
- To others	41.2	41.8	40.5	41.6	2.7	-0.3
- Exports to third countries	0.3	0.3	0.3	0.2	-13.6	-27.3
Total	**309.7**	**309.9**	**308.3**	**282.7**	**-8.3**	**-8.8**
COKE						
Resources						
- Production	43.6	44.1	42.3	41.3	-2.6	-6.5
- Imports from third countries	1.5	1.7	1.4	1.2	-16.3	-28.8
Total	**45.1**	**45.8**	**43.7**	**42.4**	**-3.0**	**-7.3**
Deliveries						
- To steel industry	40.0	39.3	37.9	36.2	-4.5	-7.9
- Other deliveries within the Community	4.2	4.5	3.9	4.3	10.1	-4.8
- Exports to third countries	0.9	1.0	0.7	0.6	-19.0	-37.5
Total	**45.1**	**44.8**	**42.1**	**41.1**	**-3.4**	**-8.2**
LIGNITE AND PEAT						
Resources						
- Production and imports	196.1	192.1	196.3	190.2	-3.1	-1.0
Deliveries						
- To briquetting plants	17.2	14.1	17.9	16.3	-9.2	15.7
- To power stations	174.7	173.8	174.2	168.5	-3.3	-3.1
- Others (including exports to third countries)	5.1	5.3	5.2	5.4	2.8	1.2
Total	**197.0**	**193.2**	**197.3**	**190.1**	**-3.6**	**-1.6**

(!) The sums may not add up due to rounding.
* Including industrial and pithead power stations
**Excluding the new German Länder.

4.1 Hard coal production.

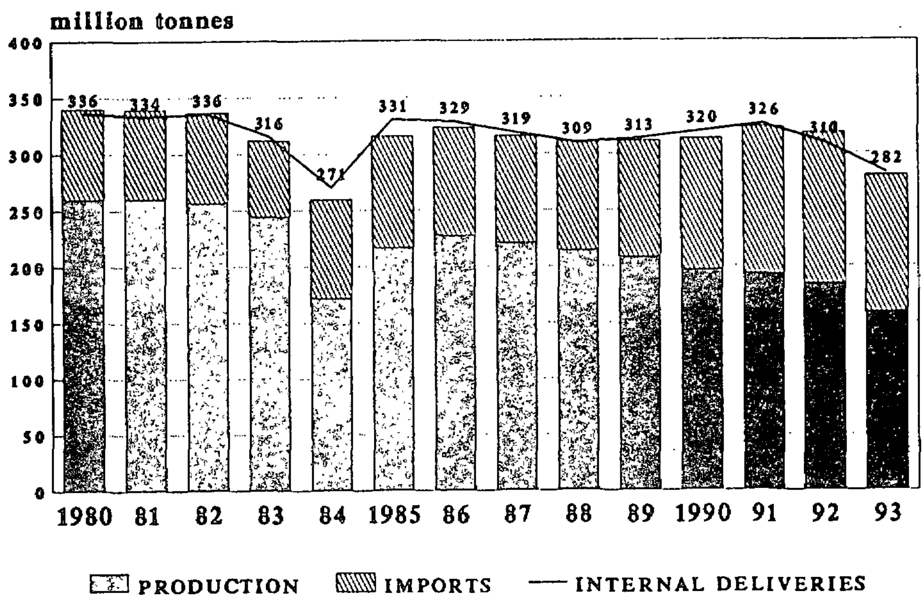
According to the latest information available, hard coal production in the Community amounted to 184.6 Mt in 1992, which is 0.9 Mt more than forecast in the previous report.

COMPARISON OF THE HARD COAL PRODUCTION FOR THE MAIN PRODUCER COUNTRIES (million tonnes)						
Member State	1991	Results in 1992		Forecasts for 1993		1993/92
		previous	actual	previous	actual	(%)
United Kingdom	91.5	83.0	83.9	83.0	68.0	-18.9
Germany	72.7	72.2	72.2	63.8	63.5	-12.1
Spain	17.9	18.6	18.6	18.5	18.5	-0.7
France	10.1	9.4	9.5	9.1	9.0	-5.4
Belgium	0.6	0.2	0.2	--	--	-100.0
Others	0.3	0.3	0.3	0.3	0.2	-4.0
Total	193.2	183.7	184.6	174.7	159.2	-13.8

For 1993, current forecasts are for a marked drop of some 25.4 Mt (-13.8 %) to 159.2 Mt. The most significant decreases are expected to be in the United Kingdom, with some 15.3 Mt less (-18.9%) as result of the lower demand for hard coal from the power stations, followed by Germany with some 8.5 Mt (-12.1%).

In Germany, the cutbacks forecast for production in 1993 are the biggest annual reduction registered in over 20 years. Sales of coal to the electricity industry are decreasing for structural reasons and sales to the steel industry will be reduced significantly, to the extent that the level of sales to the latter is likely this year to reach the level that was originally forecast for the end of the decade.

PRODUCTION, IMPORTS & DELIVERIES
HARD COAL - EUR 12 -



* Excluding the new German Länder

In the United Kingdom, the most noticeable event was the announcement of British Coal in October 1992 that, in the light of the market decline for coal, 27 pits out of the existing 50 pits were to be closed and 4 others to be mothballed. In late October the government decided to review the prospects for 21 pits of these 31 pits to remain open and to close the remaining 10 pits, after the normal period of consultation. During the whole period of the coal review, the coal industry remained at the forefront of public attention.

The review was completed in March 25th, published in a "White Paper", and debated in the UK Parliament. Basically the Government review generally endorsed the previous policy of promoting competition in the energy market, with the main difference being the fact that the government was now prepared to offer subsidies to British Coal, and to the other UK deep-mined coal producers, to enable additional tonnages of coal to be sold to power stations at a competitive price to imported coal.

These subsidies would be temporary and would decline over time. The details of the subsidies have not yet been finalised.

At the conclusion of the coal review, British Coal announced that, out of the 21 pits, production would continue in 12 pits, a further 6 would be placed on a care and maintenance basis (production would be stopped), 2 would be closed and the remaining pit placed in development, which would mean that production would stop but development work and investments would continue so that the mine could be reopened in 2 years time.

All the pits to be closed would be offered for sale to private operators.

The government review endorses the existing policy of privatising British Coal and a Bill will be introduced in the next Parliamentary session to provide for British Coal to be sold and for an independent coal authority to be established, which would be responsible for licensing all coal mining. At the moment private operators are licensed by British Coal.

The other significant event in the United Kingdom for the coal industry was in the budget statement; VAT on energy use was to be imposed for the first time on all households.

Despite the drop in production, total Community stocks at the collieries should remain roughly stable at some 36.5 Mt at the end of this year, which represents more than 83 days worth of production. This is a result of the lower demand for hard coal. Stocks at the British mines could increase by 2.3 Mt to reach 16.0 Mt, whilst those at the German pits could decrease by 2.2 Mt to reach 17.6 Mt.

4.2 Deliveries of hard coal.

In 1992, internal hard coal deliveries in the Community totalled 309.6 Mt, which is some 16.3 Mt down on the previous year. This decrease was mainly due to the lower demand from all the consumer sectors, with the only exception being thermal coal deliveries to the steel industry. The drop in deliveries was especially marked in the electricity generating industry, followed by the cokeries, industry in general and domestic heating.

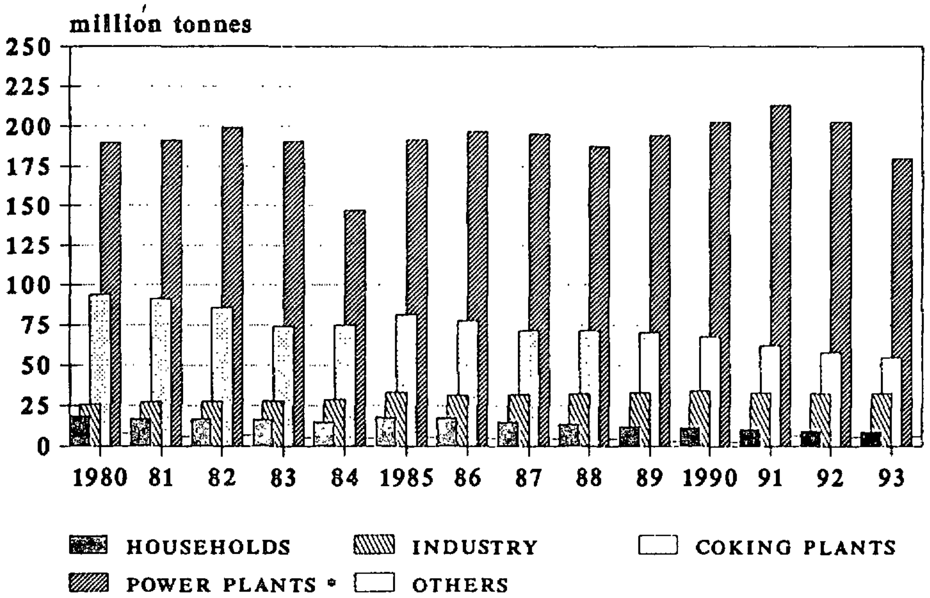
The most noticeable feature was the drop in deliveries to the public power stations, which had shown a upwards trend during the 1980s, punctually broken in 1984 by the coal mining strike in the United Kingdom and in 1988 because the exceptional rainfall level, which had allowed a large amount of hydro-electricity production.

Deliveries to the other sectors showed the usual downward trend exhibited in the past. Only deliveries of thermal coal to the steel industry increased by 1.1 Mt to total 7.2 Mt.

Whilst deliveries to the public power stations have dropped by 8.6 Mt, stocks at the power plants have increased by 6.1 Mt, to total some 75 Mt. Individually, by country, the main variations in stocks were in Denmark (+0.9 Mt), in France (+2.4 Mt) and in the United Kingdom (+1.7 Mt). With respect to coal use in electricity generation, the main decreases were in the United Kingdom, followed by Denmark and Italy. On the other hand, in Spain there was an increase in coal use at power stations. The reasons for these variations are the following:

- in Denmark, the increase in electricity imports;
- in Spain, the low rainfall, and consequently the low hydro-electric production, provoked a higher demand from the coal-fired power stations and fuel-fired power stations;
- in Italy because of the higher utilisation of fuel fired plants in detriment to coal; and
- in the United Kingdom the increasing performance of the nuclear plants.

INLAND DELIVERIES OF HARD COAL



* Public and pithead power stations
**Excluding the new German Länder

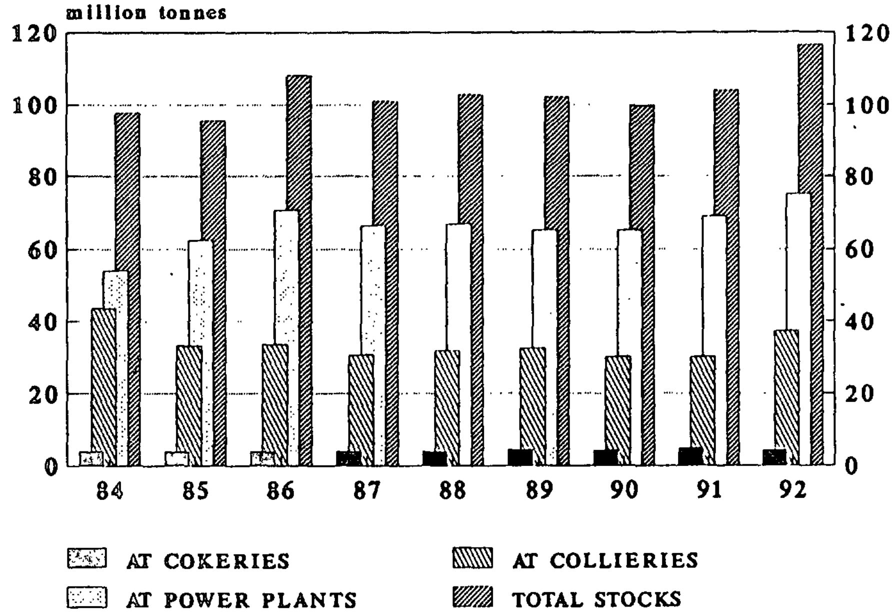
For 1993, total internal hard coal deliveries are expected to decrease again by 27.1 Mt (-8.8%) to reach 282.5 Mt. This tonnage would be the lowest ever seen in the Community, with the exception of 1984, the year of the strike in the British coal mining industry.

By sectors, the forecasts are for a generalised decrease with the sole exception being deliveries of "thermal coal" to the steel industry for PCI purposes. The most significant falls are forecast for electricity generation, with a decrease of some 23.6 Mt (-11.3%) to 185.9 Mt, followed by deliveries to the cokeries with a 3.3 Mt drop (-5.7%) to 58.3 Mt.

The deliveries to the electricity generating sector and to the cokeries are responsible for 99% of the expected decrease in deliveries during 1993 compared to 1992. In particular, the former accounts for some 87% of the total reduction

By country, the decrease is expected to be particularly marked in the United Kingdom with a decline of some 27.2 Mt (-19.2%), followed by Germany with 3.9 Mt (-4.8%), France with 1.8 Mt (-6.3%), Denmark with 1.3 Mt (-12.3%) and Spain with 1.1 Mt (-3.1%). Other drops are much less significant in absolute terms.

HARD COAL STOCKS AT THE END OF THE YEAR



On the other hand, only four countries escape this downwards trend but together only amount to an increase of 0.8 Mt.

Furthermore, the depressed economic activity is an additional factor for the decreasing demand for coal in some sectors such as the steel-making industry, which is facing restructuring programmes and important structural changes, and the group of "other industries".

With respect to the coal deliveries to the public power stations, the expected decrease is 24.3 Mt (-12.2%) to 174.9 Mt. Only two countries escape this trend but both together only account for a small increase of 0.5 Mt. The most significant change in absolute terms, is forecast in the United Kingdom (-19.3 Mt) and in a lesser extent in France (-1.9 Mt) and in Denmark (-1.3 Mt).

The principle reason for this anticipated decrease in the market is the contraction of coal demand in the United Kingdom together with the increased penetration of natural gas into this sector. Also the nuclear industry is expected to have improved its performance.

In the United Kingdom for 1993 the quantities to be delivered to the generators are 60 Mt, a tonnage which is substantially lower than in previous years. There may, however, be some additional short term contracts for small quantities. On the other hand, there is the increasing generation from gas. There are now 15 major gas fired power stations under construction or already in operation, which will have a total capacity of 9000 MW. These are due to start operating between late 1992 and the end of 1995.

DELIVERIES OF HARD COAL TO THE MAIN CONSUMER SECTORS (million tonnes)					
Sector	1991	1992	1993	1993/91 (%)	1993/92 (%)
- Public power stations	207.8	199.2	174.9	-15.8	-12.2
- Colliery power stations	5.8	4.2	4.9	-15.5	+17.6
- Coke ovens	62.4	58.3	55.0	-11.9	-5.7
- Steel industry*	6.1	7.2	7.3	+20.7	+1.5
- Other industries*	27.1	25.6	25.2	-6.8	-1.4
- Domestic sector and issues to workers	10.4	9.5	9.2	-11.6	-3.2
- Others **	6.4	5.6	6.0	-7.5	+6.7
Total inland deliveries	**325.9**	**309.6**	**282.5**	**-13.3**	**-8.8**

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

5. THE COKE MARKET

The coke market continues to shrink. This is the logical consequence of the situation facing the steel industry, a sector which absorbs more than 90% of the total inland deliveries of coke and, to a lesser extent, the slight, almost permanent, downwards trend in the other minor consumer sectors such as "other industries" and the domestic sector.

The serious decline in the Community's steel market, which has been in evidence since mid-1990 and which began to worsen in the summer of 1992, has now revealed the structural nature of the imbalance between supply and demand. The steel industry is aware of the gravity of the situation and envisages a restructuring programme which will entail broad capacity closures.

Crude steel production in the European Community(3) amounted to 132.1 million tonnes in 1992, a drop of about 4% compared to 1991. However, the fall in Community steel production in 1992 did not start to become significant until September 1992 (-5.6%), with further falls of 14% in November and 20.3% in December. The main decreases in steel production in 1992, in the individual member states, were recorded in Belgium (-9.%), in Germany (-5.8%) and in Spain (-4%).

The downward trend in steel production continued through the early part of 1993, with falls close to 10% in January and February, although production has more or less begun to level out since March. During the first four months of 1993, German production fell by 14.3%, French production by 9.6% and Spanish production by 6.2% compared to the same period in 1992.

Total steel production for 1993 is therefore estimated at 125.0 Mt, which is a fall of 7.1 Mt compared to the 1992 figure.

Coke production was 44.1 Mt during 1992, which is 3 Mt lower than the figure for the previous year. Estimations for 1993 are for around 41.3 Mt, which is 2.9 Mt less than for 1992. A similar trend is expected during 1993 for intra-Community trade and direct imports from third countries. Forecasts for intra-Community trade in 1993 point to 2.3 Mt in terms of

(3) Forward programme for steel for the second half of 1993.CEC. Crude steel production figures include the new German Länder.

receipts, compared to 2.4 Mt in 1992, whilst direct imports from third countries are likely to decline by 0.5 Mt to 1.2 Mt.

Total inland deliveries amounted to 43.8 Mt in 1992 and the forecasts for 1993 are for 40.5 Mt (down 3.3 Mt). Deliveries to the steel industry are forecast at 36.2 Mt, compared with 39.3 Mt supplied in 1992 and more than 43 Mt in 1991.

6. HARD COAL IMPORTS FROM THIRD COUNTRIES.

Imports of hard coal from third countries in 1992 rose by 3 Mt to reach 133.2 Mt. This rise was, to a large extent, much lower than expected at the beginning of 1992, but was conditioned by the fall in demand for coal which surpassed the cutbacks in production of the Community hard coal industry.

By individual countries, the greatest increases during 1992 were to be found in Spain (up 3.1 Mt), Germany (2.3 Mt) and France (1.1 Mt). Most of these increases were for steam coal. On the other hand, Denmark and Italy decreased the level of their imports by 2.5 and 1.0 Mt respectively. Other variations were of less than 1 Mt.

By suppliers, the most important changes were the gains made by South Africa and the minor exporters to the Community (countries such as Indonesia and Venezuela), who increased their volumes of coal by a total of 6.2 Mt. On the other hand, imports from United States dropped by 3.9 Mt to attain 46.6 Mt during 1992.

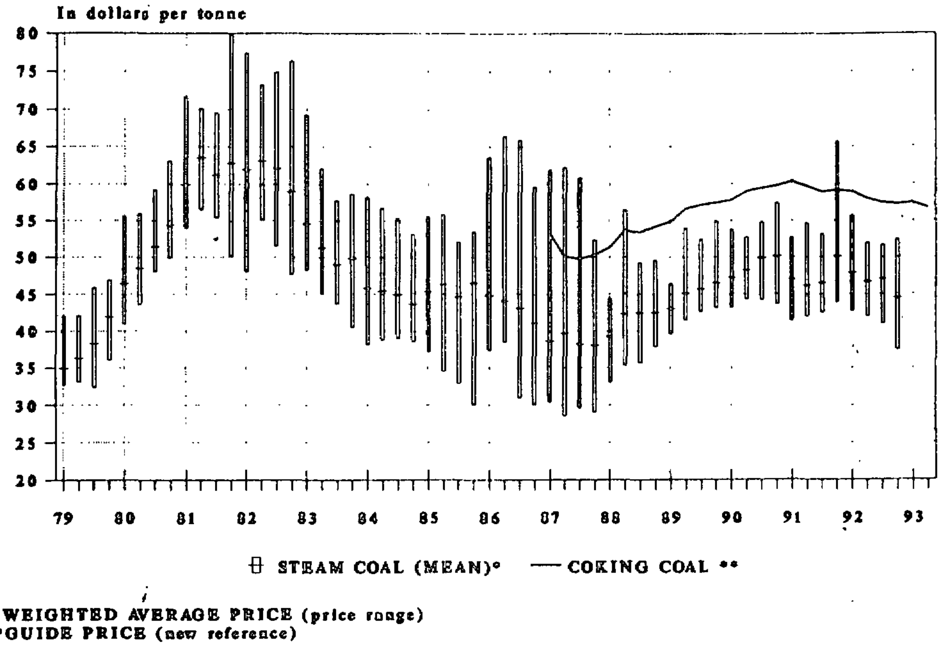
For 1993, for the first time in many years, total imports are expected to decline with respect to the previous years. Total imports are forecast at 120.7 Mt, which is 12.6 Mt (-9.4%) less than in 1992.

Given that Community hard coal production is expected to decline by 27.4 Mt (including recoveries) and deliveries by 27.1 Mt, which is roughly the same tonnage, one may have thought that imports during 1993 would have been roughly the same level as in 1992. However, hard coal stocks at the collieries and at the power stations have significantly grown since 1990 (by some 24% and 15% respectively, to attain 37.2 Mt and 74.9 Mt), with total stocks of 116.4 Mt. This growth has been especially marked in Germany and the United Kingdom. Stocks during 1993 are not expected to increase with respect to 1992 level.

Only three countries are expected to increase their hard coal imports, although altogether they will account for an increase of less than 0.5 Mt. On the other hand, significant decreases are forecast in France (-5.2 Mt; -24.5%), in the United Kingdom (-4.0 Mt; -19.7%), in Denmark (-1.2 Mt; -11.2%) and in Spain (-1.0 Mt; -7.5%), only to mention those with falls higher than 1 Mt.

With respect to the suppliers, only Poland, the CIS and other minor exporters as Indonesia and Venezuela may increase their exports to the Community during 1993. On the other hand, the main coal suppliers (such as the United States, South Africa, Australia, Colombia and Canada) are likely to see a decrease in the quantities exported to the Community. In particular, the United States with a decrease of 9.2 Mt (or 19.6%), could lose four percent of its share in Community imports during 1993 compared to 1992.

MEAN CIF PRICES FOR HARD COAL IMPORTED FROM THIRD COUNTRIES



6.1 Prices for imported coal

The average CIF price in US dollars for Community steam coal imports from third countries for power stations in 1992 did not change compared to the average price for 1991. However, due to the depreciation of the US dollar compared to the Community currency, prices for steam coal were some 4.5% lower during 1992 when expressed in ECU.

AVERAGE CIF PRICE FOR STEAM COAL IMPORTED FROM THIRD COUNTRIES ($/tce) *		
QUARTER	1991	1992
I	52.18	53.12
II	51.08	51.53
III	50.96	52.35
IV	53.78	50.01
Average	52.01	52.01

* imports for power stations

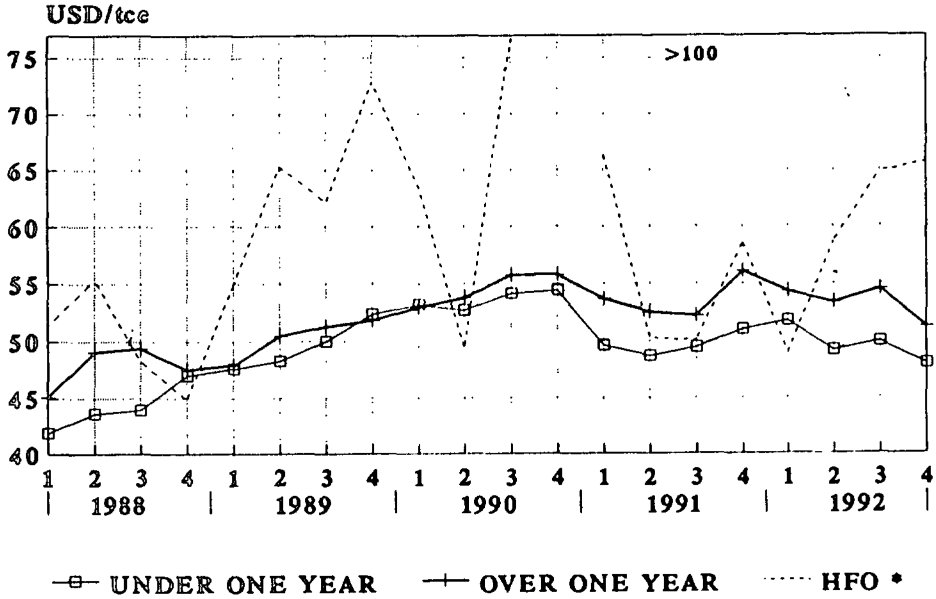
The 1992 guide price for coking coal imports from third countries, on average, decreased by almost 3% in terms of US dollars when compared with 1991 and by more than 7% when expressed in terms of ECUs. Prices have been declining ever since the first quarter of 1991.

GUIDE CIF PRICE FOR COKING COAL IMPORTED FROM THIRD COUNTRIES ($/t)*			
QUARTER	1991	1992	1993
I	60.40	58.90	57.50
II	59.70	58.00	56.80
III	58.90	57.50	../..
IV	59.20	57.30	../..

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

The international market for coal is affected by the lower demand for coal which is accentuating the current surpluses. In the European Community this decrease in demand is, in a certain extent, due to the contraction of the economy and of industrial activity, together with the mild weather conditions observed during the first half of this year.

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



° Spot price Rotterdam; 3.5% sulphur

This contraction in demand is provoking a generalised decline on prices in the international market. This decline has been especially marked for Colombian and South African coals; on the other hand, exporters from United States are unable to compete with the prices offer by other coal exporting countries. At his stage, there are no elements to think that there will be any changes in the second quarter with respect to the trend observed during the first quarter of the current year.

7. LIGNITE

For 1993 lignite availabilities, including imports but not taking into consideration the new German Länder, are estimated at around 190.2 Mt, which is 1.9 Mt down on the 1992 figure. Power stations are expected to consume some 168.5 Mt, which represents almost 89% of available resources and which is 5.4 Mt down on the previous year's figure.

The expected drop in demand from German power stations (-6.2 Mt) will result in a drop for the whole Community figure in 1993, despite the anticipated increase in demand from the German briquetting plants (+2.2 Mt) and from the Greek power stations (+1.3 Mt).

With regard to the evolution of the lignite industry in the new German Länder, the table below summarises the results for 1991 and 1992 and the forecasts for 1993. As it can be seen, the lignite industry is undergoing a strong restructuring process aimed at ensuring that production does not exceed demand within the new market framework. The cutbacks forecast for 1993 are substantially smaller than those seen over the last three years as the industry in the new German Länder is approaching its targeted size of around 100 Mt per year.

MAIN FEATURES OF THE LIGNITE INDUSTRY IN THE NEW GERMAN LÄNDER (million tonnes)				
	1991	**1992**	**1993**	**1993/92 (%)**
RAW PRODUCT				
RESOURCES	**168.3**	**130.6**	**125.6**	**-3.8**
Production	167.7	129.4	124.4	-3.8
Imports	0.6	1.1	1.2	5.2
UTILISATION	**168.3**	**130.6**	**125.6**	**-3.8**
Briquetting plants	57.2	28.3	33.0	16.5
Power stations	81.0	85.1	75.0	-11.9
Others	30.1	17.1	17.6	3.2
BRIQUETTES				
AVAILABILITIES	**20.1**	**11.6**	**10.8**	**-6.8**
Production	19.8	11.3	10.5	-7.1
Imports	0.1	0.1	0.1	-
Arrival from ECSC countries	0.2	0.1	0.1	11.1
UTILISATION	**20.1**	**11.6**	**10.8**	**-6.8**
Industry	5.2	3.0	2.3	-23.2
Domestic	14.4	8.2	8.1	-0.9
Exports to EEC	0.2	0.2	0.2	-1.0
Exports to third countries	0.3	0.2	0.2	-10.3

8. CONCLUSIONS.

The expected contraction in the Community's GDP during 1993 is likely to lead to a decrease in total energy demand and solid fuels are likely to be the energy source most affected. The revised forecasts for coal during 1993 point to a contraction of the Community market for solid fuels, and an especially marked contraction for hard coal.

Total deliveries for hard coal are expected to fall by 27.1 Mt with respect to 1992 figures, to attain 282.7 Mt, which is one of the lowest ever seen in the Community. By sector, there is a generalised drop but one especially marked in the electricity generating industry. By countries, the most significant drop is that forecast for the United Kingdom.

Both Community production and imports from third countries will decline during 1993. Production will decrease by 25.4 Mt to reach 159.2 Mt and imports fall 12.6 Mt to attain 120.7 Mt. However, despite the drop in supplies, there will hardly be any reduction in the already large volume of stocks. Total hard coal stocks were 116 Mt at the end of 1992.

The coke market continues to shrink. Also, since mid-1990, the Community steel market has been facing a serious decline, which worsen in the summer of 1992.

The lignite market also is expected to decrease in 1993, even when excluding the new German Länder. This is the result of the lower demand expected from power stations.

On the external side, the international market is obviously affected by this weak demand for coal. There are surpluses in the market and consequently prices for hard coal have shown a sustained decrease during the first half of the year. There is no evidence of any substantial change for the second half of the year.

ANNEXES

TABLE 1

HARD COAL BALANCE SHEET FOR 1993

27-Jul-93 (In thousands of metric tons)

	Belgique	Danmark	Deutsch-land	España	France	Hellas	Ireland	Italia	Luxem-bourg	Neder-land	Portugal	United Kingdom	EUR-12
1. PRODUCTION (t=t)			63460	18500	8970		21				220	68000	159171
2. RECOVERIES	865		1000	110	430							1000	3405
3. RECEIPTS FROM ECSC COUNTRIE	870		700 *	800	450		330	33	17	295	40	200	3735
4. IMPORTS FROM THIRD COUNTRIES	12715	9767	11300 *	12700	16150	2200	2680	17389	179	14705	4790	16100	120675
5. AVAILABILITIES (1+2+3+4)	**14450**	**9767**	**76460**	**32110**	**26000**	**2200**	**3031**	**17422**	**196**	**15000**	**5050**	**85300**	**283251**
6. TOTAL INLAND DELIVERIES	13835	9767	77250	32530	26000	2200	2999	17389	196	13050	5050	82200	282466
A.- POWER STATIONS AT MINES			1600		3300								4900
B.- POWER STATIONS	5680	8985 *	47000	25500	7000	600	1949	6510		7700	3939	60000	174863
C.- COKING PLANTS	5700		16700	4250	8200			7184		4100	350	8500	54984
D.- IRON AND STEEL INDUSTRY	950		2700		1800	100		1220	79			500	7349
(of which POWER STATIONS)			*20*										*20*
E.- OTHER INDUSTRIES	850	440 *	7900	2400	3900	1500	420	1181	116	267 *	761	5500	25235
(of which POWER STATIONS)			*4580*									*1500*	*6080*
F.- DOMESTIC HEATING	650	342 *	400	230	1250		630		1			5200	8703
G.- MISCELLANEOUS (TOTAL 1 - 6)	5		950	150	550			1294		983 *		2500	6432
1. ISSUE TO WORKERS			*100*	*70*								*300*	*470*
2. PATENT FUEL PLANTS	*5*		*590*		*450* *							*1200*	*2245*
3 OWN CONSUMPTION AT MINES			*60*	*80*									*140*
4. GASWORKS													
5. RAILWAYS			*80*										*80*
6. OTHERS			*120*		*100* *			*1294*		*983*		*1000*	*3497*
7. DELIVERIES TO ECSC COUNTRIES	**615**		**890**		**554** *		**20**			**1920**		**700**	**4699**
8. EXPORTS TO THIRD COUNTRIES			**10**		**106** *							**100**	**216**
9. TOTAL DELIVERIES (6+7+8)	**14450**	**9767**	**78150**	**32530**	**26660**	**2200**	**3019**	**17389**	**196**	**14970**	**5050**	**83000**	**282682**
10. MOVEMENT OF PRODUCERS' AND IMPORTERS STOCKS (5-9)			-1690	-420	-660		12	33		30		2300	-395

* Commission estimates

TABLE 2

HARD COAL BALANCE SHEET FOR 1992

27-Jul-93 (In thousands of metric tons)

	Belgique	Danmark	Deutschland	España	France	Hellas	Ireland	Italia	Luxembourg	Nederland	Portugal	United Kingdom	EUR-12
1. PRODUCTION (t=t)	218		72160	18635	9478		1	30			220	83855	184597
2. RECOVERIES	979		2300	49	771							1229	5328
3. RECEIPTS FROM ECSC COUNTRIE	868	137	768	550	607		334	144	26	291	37	323	4085
4. IMPORTS FROM THIRD COUNTRIES	13146	10997	11810	13729	21383	2132	2683	17958	252	14661	4445	20050	133246
5. AVAILABILITIES (1+2+3+4)	**15211**	**11134**	**87038**	**32963**	**32239**	**2132**	**3018**	**18132**	**278**	**14952**	**4702**	**105457**	**323171**
6. TOTAL INLAND DELIVERIES	14226	11134	80527	33566	27969	1917	2959	17322	278	13214	4702	101747	309561
A.- POWER STATIONS AT MINES	81		1669		2417								4167
B.- POWER STATIONS	5899	10242 *	47753	25815	8934	529	2309	7100		7810	3525	79272	199188
C.- COKING PLANTS	5765		18721	4561	8839			7228		4178	351	8671	58314
D - IRON AND STEEL INDUSTRY	954		2564		1925	84		1074	138			500	7239
(of which POWER STATIONS)			*23*		*137*								*160*
E.- OTHER INDUSTRIES	842	502 *	8139	2770	3988	1300	260	1290	140	256 *	825	5278	25590
(of which POWER STATIONS)			*4680*									*1294*	*5974*
F.- DOMESTIC HEATING	680	390 *	556	270	1310		390					5334	8930
G.- MISCELLANEOUS (TOTAL 1 - 6)	5		1125	150	556	4		630		970 *	1	2692	6133
1 ISSUE TO WORKERS			*112*	*70*								*365*	*547*
2. PATENT FUEL PLANTS	*2*		*689*		*453*							*1303*	*2447*
3 OWN CONSUMPTION AT MINES	*3*		*76*	*80*								*79*	*238*
4. GASWORKS													
5. RAILWAYS			*104*			*2*							*106*
6. OTHERS			*144*		*103*	*2*		*630*		*970*	*1*	*945*	*2795*
7. DELIVERIES TO ECSC COUNTRIES	**640**		**1509**		**388 ***		**30**			**2131**		**856**	**5554**
8. EXPORTS TO THIRD COUNTRIES	**33**		**22**		**109 ***					**16**		**117**	**297**
9. TOTAL DELIVERIES (6+7+8)	**14899**	**11134**	**82058**	**33566**	**28466**	**1917**	**2989**	**17322**	**278**	**15361**	**4702**	**102720**	**309858**
10. MOVEMENT OF PRODUCERS' AND IMPORTERS STOCKS (5-9)	312		4980	-603	3773	215	29	810		-409		2737	11844

* Commission estimates

TABLE 3

COKE BALANCE SHEET FOR 1993

27-Jul-93 (In thousands of metric tons)

	Belgique	Danmark +	Deutsch-land	España	France	Hellas	Ireland	Italia	Luxem-bourg	Neder-land	Portugal	United Kingdom	EUR-12
1. PRODUCTION (t=t)	4400		13100	3400	6250			4700		2900		6500	41250
2. RECEIPTS FROM ECSC COUNTRIES	180	44	400 *	50	250	20	15		1030	175	7	100	2271
3. IMPORTS FROM THIRD COUNTRIES	470		400 *				5		70	125	15	100	1185
4. TOTAL AVAILABILITIES (1+2+3)	**5050**	**44**	**13900**	**3450**	**6500**	**20**	**20**	**4700**	**1100**	**3200**	**22**	**6700**	**42435**
5. TOTAL INLAND DELIVERIES	4280	44	11940	3400	6270	20	20	4469	1100	2000	270	6700	40513
A.- STEEL INDUSTRY	4150	4	10400	3200	5100		13	4000	1100	2000	250	6000	36217
B.- OTHER INDUSTRIES	100	36	700	200	900	20	7				20	400	2383
C.- DOMESTIC SECTOR	10	4	200		130							200	544
D.- MISCELLANEOUS of which :	20		640		140			469				100	1369
1. ISSUE TO WORKERS	5		*300*										*305*
2. OWN CONSUMPTION			5										5
3. OTHERS	*15*		*335*		*140*			*469*				*100*	*1059*
6. DELIVERIES TO ECSC COUNTRIES	**725**		**560**		**344** *			**54**		**950**			**2633**
7. EXPORTS TO THIRD COUNTRIES	**45**		**100**		**66** *			**124**		**250**	**20**		**605**
8. TOTAL DELIVERIES (5+6+7)	**5050**	**44**	**12600**	**3400**	**6680**	**20**	**20**	**4647**	**1100**	**3200**	**290**	**6700**	**41118**
9. STOCK MOVEMENT AT													
PRODUCTION & IMPORTS (4-8)			1600	50	-180			53					1523

* Commission estimates; + Data supplied in November 1992

TABLE 4

COKE BALANCE SHEET FOR 1992

27-Jul-93 (In thousands of metric tons)

	Belgique	Danmark +	Deutsch-land	España	France	Hellas	Ireland	Italia	Luxem-bourg	Neder-land	Portugal	United Kingdom	EUR-12
1. PRODUCTION (t=t)	4575		14729	3186	6795			5385		2920		6528	44118
2. RECEIPTS FROM ECSC COUNTRIES	175	44	237	43	428	20	15		1155	171	7	110	2405
3. IMPORTS FROM THIRD COUNTRIES	439		451	64	125	2	5	22	26	157	15	359	1665
4. TOTAL AVAILABILITIES (1+2+3)	**5189**	**44**	**15417**	**3293**	**7348**	**22**	**20**	**5407**	**1181**	**3248**	**22**	**6997**	**45783**
5. TOTAL INLAND DELIVERIES	4287	44	13718	3328	6848	19	20	5184	1181	2110	279	6809	43827
A.- STEEL INDUSTRY	4158	4	11969	3128	5752		13	4715	1181	2110	248	6037	39315
B.- OTHER INDUSTRIES	99	36	806	200	797	19	7				30	388	2382
C.- DOMESTIC SECTOR	10	4	244		135							281	674
D.- MISCELLANEOUS of which :	20		699		164			469			1	103	1456
1. ISSUE TO WORKERS	7		*346*										*353*
2. OWN CONSUMPTION			*4*										*4*
3. OTHERS	*13*		*349*		*164*			*469*			*1*	*103*	*1099*
6. DELIVERIES TO ECSC COUNTRIES	**715**		**920**		**266 ***			**65**		**924**		**24**	**2914**
7. EXPORTS TO THIRD COUNTRIES	**45**		**161**		**137 ***			**158**		**252**	**41**	**174**	**968**
8. TOTAL DELIVERIES (5+6+7)	**5047**	**44**	**14799**	**3328**	**7251**	**19**	**20**	**5407**	**1181**	**3286**	**320**	**7007**	**44795**
9. STOCK MOVEMENT AT													
PRODUCTION & IMPORTS (4-8)	142		901	-35	97	3				-38	-30	-10	1030

* Commission estimates; + Data supplied in November 1992

TABLE 5

LIGNITE AND PEAT BALANCE SHEET FOR 1993

27-Jul-93 (In thousands of metric tons)

	Belgique	Danmark +	Deutschland a	España	France	Hellas	Ireland *	Italia *	Luxembourg	Nederland	Portugal	United Kingdom	EUR-12
A. RAW PRODUCT													
- AVAILABILITIES :	**240**		**110660**	**14500**	**1782**	**56000**	**5855**	**1171**	**9**				**190217**
PRODUCTION			108290	14500	1780	56000	5827	1149					187546
IMPORTS	240		2370		2		28	22	9				2671
- UTILIZATION :	**240**		**110660**	**14500**	**1780**	**56000**	**5736**	**1171**	**9**				**190096**
BRIQUETTING PLANTS			16055			200							16264
POWER STATIONS			92925	14500	1550	55100	3235	1149					168459
OTHERS	240		1680		230	700	2501	22	9				5382
B. BRIQUETTES													
- AVAILABILITIES :	**25**	**2**	**5455**			**60**	**384**		**12**				**5938**
PRODUCTION			5185			60	384						5629
ARRIVAL FROM ECSC COUNTRIE	25	2	200 b						12				239
IMPORTS FROM THIRD COUNTRIE			70										70
- UTILIZATION	**25**	**2**	**5455**			**60**	**386**		**12**				**5940**
POWER STATIONS													
INDUSTRY			3255										3255
DOMESTIC	25	1	1300				386		12				1724
SHIPMENTS TO OTHER													
ECSC COUNTRIES			763 c										763
EXPORTS TO NON-MEMBER													
COUNTRIES			137 *										137
- OTHERS		1				60							61

* Commission estimates; + data supplied in November 1992; a : figures for old Länder only; b : imports from new Länder, c : includes exports to new Länder;

TABLE 6

LIGNITE AND PEAT BALANCE SHEET FOR 1992

30-Jul-93 (In thousands of metric tons)

	Belgique	Danmark +	Deutsch-land a	España	France	Hellas	Ireland +	Italia	Luxem-bourg	Neder-land	Portugal	United Kingdom	EUR-12
A. RAW PRODUCT													
- AVAILABILITIES :	**244**		**114759**	**14779**	**1580**	**55051**	**4153**	**1532**	**10**	**35**			**192143**
PRODUCTION			112389	14779	1578	55051	4125	1500					189422
IMPORTS	244		2370		2		28	32	10	35			2721
- UTILIZATION :	**244**		**114759**	**14727**	**1491**	**54474**	**5923**	**1532**	**10**	**35**			**193195**
BRIQUETTING PLANTS			13842			203							14055
POWER STATIONS			99154	14727	1245	53790	3415	1500					173831
OTHERS	244		1763		246	481	2508	32	10	35			5319
B. BRIQUETTES													
- AVAILABILITIES :	**23**	**4**	**5594**			**62**	**448**	**100**	**10**				**6241**
PRODUCTION			5299			62	448						5809
ARRIVAL FROM ECSC COUNTRIE	23	4	223 b					100	10				360
IMPORTS FROM THIRD COUNTRIE			72										72
- UTILIZATION	**23**	**4**	**5594**			**43**	**386**	**100**	**10**				**6160**
POWER STATIONS								100					100
INDUSTRY			3304										3304
DOMESTIC	19	2	1429				386		10				1846
SHIPMENTS TO OTHER													
ECSC COUNTRIES	4		728 c										732
EXPORTS TO NON-MEMBER													
COUNTRIES			133 *										133
- OTHERS		2				43							45

* Commission estimates; + data supplied in November 1992; a : figures for old Länder only; b : imports from new Länder, c : includes exports to new Länder;

TABLE 7

HARD COAL PRODUCTION BY AREA

27-Jul-93 (In thousands of metric tons)

	1991	1992	1993
Campine	634	218	
BELGIUM	**634**	**218**	
Ruhr	57075	57122	50340
Aachen	3861	3480	1650
Ibbenburen	2033	2016	2040
Saar+Kleinzechen	9775	9542	9430
GERMANY	**72744**	**72160**	**63460**
Central Asturias	3848	3982	3525
Bierzo-Villablino + Narceá	5901	6407	6315
Norte Leon + Palencia	2088	2392	2085
Sur	1956	1953	1875
Aragon-Cataluña, Baleares	4124	3901	4700
SPAIN	**17917**	**18635**	**18500**
Lorraine	8386	8085	7700
Centre-Midi	1743	1393	1270
FRANCE	**10129**	**9478**	**8970**
IRELAND	**5**	**1**	**21**
ITALY	**20**	**30**	
PORTUGAL	**270**	**220**	**220**
Scotland	2253	2114	
North-East	7906	6205	
Yorkshire	27216	27332	
Nottinghamshire	17192	15909	
Midlands	17215	12704	
BC Opencast	16648	15260	15000
Licensed mines + Opencast	3074	3916	4000
UNITED KINGDOM	**91504**	**83855**	**68000**
EUR 12	**193223**	**184597**	**159171**

* Commission estimates

TABLE 8

COAL IMPORTS FROM THIRD COUNTRIES

27-Jul-93

(In thousands of metric tons)

1992	U.S.A	Canada	Australia	South Africa	Poland	CIS	China	Colombia	Others	Total Imports
Belgique	5025	173	2236	4120	328	332	545	228	159	13146
Danmark	3316	1252	1512	386	906	1219	115	2002	289	10997
Deutschland	1024	200	630	5790	1711	180			2275	11810
España	4298	388	1293	6000	211	319		731	489	13729
France	8561	317	4737	2670	558	825	1254	1596	865	21383
Hellas		43		963		924		147	55	2132
Ireland	1149			39	559	30	2		904	2683
Italia	8657	222	1801	4134	425	939	260	540	980	17958
Luxembourg				128		86			38	252
Nederland	5752	539	4251	1022	757	21	114	1198	1007	14661
Portugal	1387	201	71	2149	44	78		515		4445
UK	7473	878	4302	998	1017	791	362	3465	764	20050
EUR-12	46642	4213	20833	28399	6516	5744	2652	10422	7825	133246

1993	U.S.A	Canada	Australia	South Africa	Poland	CIS	China	Colombia	Others	Total Imports
Belgique	4985	175	2255	3850	345	415	450	140	100	12715
Danmark	579	229	547	2171	1460 *	1964 *		1424	1393	9767
Deutschland	1100 *	300 *	500 *	5300 *	1400 *	200 *			2500 *	11300
España	4400	150	1200	5400	150	200		750	450	12700
France	5400	600	2900	2100	1000	800	700	1050	1600	16150
Hellas				1000		1000			200	2200
Ireland	1148			39	558	30	2		903	2680
Italia	7863	230	1889	3625	232	1885			1665	17389
Luxembourg				117		60	2			179
Nederland	5910	500	4400	1050	675	25	100	1020	1025	14705
Portugal	1560	205	240	1870	45	200		670		4790
UK	4534 *	800 *	4503 *	1032 *	1219 *	750 *	61 *	3049 *	152 *	16100
EUR-12	37479	3189	18434	27554	7084	7529	1315	8103	9988	120675

* Commission estimates

TABLE 9

INTRA-COMMUNITY TRADE OF COAL IN 1993

27-Jul-93 (In thousands of metric tons)

	Belgique	Danmark	Deutsch-land	España	France	Hellas	Ireland	Italia	Luxem-bourg	Neder-land	Portugal	United Kingdom	Total Receipts
Belgique			369 *							350		100	819
			750		5					20		95	870
Danmark												100	100
Deutschland	175									1125			1300
	220 +				390 +					80 +		10 +	700 +
España	40									100			140
	205		160		20					145		270	800
France	210		254 *							240		200	904
	50		250									150	450
Hellas													
Ireland										15		300	315
	8		12		9					33		268	330
Italia			64 *										64
			6		27								33
Luxembourg	45												45
	16		1										17
Nederland	145		13 *										158
	180		115										295
Portugal													
												40	40
United Kingdom			190 *				20			90			300
			200										200
Deliveries	615		890		571 *		20			1920		700	4716
	474		1334		431					133		563	3735

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

* Commission estimates; + Data supplied in November 1992

TABLE 10

INTRA-COMMUNITY TRADE OF COAL IN 1992

27-Jul-93 (In thousands of metric tons)

	Belgique	Danmark	Deutsch-land	España	France	Hellas	Ireland	Italia	Luxem-bourg	Neder-land	Portugal	United Kingdom	Total Receipts
Belgique			689				1			347		125	1162
			749		5					19		95	868
Danmark	2									1		99	102
			40									97	137
Deutschland	191									1275		71	1537
	203				426					111		28	768
España	44		68							113		107	332
	154		88		21	5				169	13	100	550
France	192		247				1			269		160	869
	49		317									223	589
Hellas													
Ireland			1							19		258	278
	8		13		10					34		269	334
Italia	1		159									1	161
			144										144
Luxembourg	52		1										53
	25		1										26
Nederland	157		155									2	314
	173		114		3						1		291
Portugal										2		34	36
										3		34	37
United Kingdom	1		189				28			105			323
	13	2	247	11	3		28.4			18.4			323
Deliveries	640		1509		484 *		30			2131		856	5650
	471	2	1625	11	447		28			185	1	746	4067

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

* Commission estimates

TABLE 11

INTRA-COMMUNITY TRADE OF COKE IN 1993

27-Jul-93 (In thousands of metric tons)

	Belgique	Danmark	Deutsch-land	España	France	Hellas	Ireland	Italia	Luxem-bourg	Neder-land	Portugal	United Kingdom	Total Receipts
Belgique			8 *							350			358
			10		30					140			180
Danmark			3 *										3
	1 +		8 +		9 +					2 +		24 +	44 +
Deutschland	205							20		400			625
	200 +				120 +					80 +			400 +
España	10												10
	15		1		25			3			6		50
France	140							34		150			324
			150							100			250
Hellas													
								20					20
Ireland													
	6		4							3		2	15
Italia	10												10
Luxembourg	335		504 *										839
	150		950										1100
Nederland	25		45 *										70
	75		50		50								175
Portugal													
				3	3					1			7
United Kingdom										50			50
				20	30					50			100
Deliveries	725		560 *		378 *			54		950			2667
	432		1172	23	242			20		376		26	2341

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

* Commission estimates; + Data supplied in November 1992

92

TABLE 12

INTRA-COMMUNITY TRADE OF COKE IN 1992

27-Jul-93 (In thousands of metric tons)

	Belgique	Danmark	Deutsch-land	España	France	Hellas	Ireland	Italia	Luxem-bourg	Neder-land	Portugal	United Kingdom	Total Receipts
Belgique			6							351		1	358
			8		27					138	2		175
Danmark	2		2									13	17
	1 +		8 +		9 +					2 +		24 +	44 +
Deutschland	201							9		387		1	598
	105				80					51		1	237
España	13							5					18
	11				23			5		1	3		43
France	140		4					30		133			307
	135		118	13				34		128			428
Hellas			1					21					22
								20					20
Ireland												1	1
	6		4							3		2	15
Italia	13		24									1	38
Luxembourg	319		834										1153
	320		835										1155
Nederland	27		49									8	84
	72		53		36			2			8		171
Portugal													
				3	3					1			7
United Kingdom										53			53
	7		9	16	35.4					42.4			110
Deliveries	715		920		297 *			65		924		24	2945
	646		1035	32	190			56		365	10	27	2405

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

* Commission estimates; + Data supplied in November 1992

TABLE 13

STOCKS

02-Aug-93 (In millions of metric tons)

	Producers (Hard coal)			Power Stations (Hard coal)			Coking plants (Coke)			Coking plants (Hard coal)		
	(A) 1991	(A) 1992	(B) 1993	(A) 1991	(A) 1992	(B) 1993	(A) 1991	(A) 1992	(B) 1993	(A) 1991	(A) 1992	(B) 1993
Belgium	0.112	0.057	0.057	0.602	0.598	0.550	0.070	0.186	0.181	0.500	0.431	0.440
Denmark				7.410	8.261	7.895						
Germany	15.977	19.678	17.564	13.292	14.127	14.300	3.955	4.896	6.496	0.280	0.310	0.300
Spain	1.194	1.219	0.850	8.613	8.959	9.000	0.100	0.171	n.a.	0.377	0.452	0.400
France	1.932	2.480	n.a.	3.876	6.311	n.a.	0.427	0.460	n.a.	1.200	0.912	n.a.
Greece							0.003	0.003	n.a.			
Ireland	0.020	0.020	n.a.	0.438	0.503	0.423						
Italy				1.386	1.578	n.a.	0.314	0.180	n.a.	1.000	1.000	n.a.
Luxembourg												
Netherlands				1.750	1.750	n.a.	0.211	0.200	n.a.	0.364	0.454	n.a.
Portugal	0.001	0.001	0.001	0.913	0.611	0.851	0.053	0.022	0.022	0.060	0.037	0.037
United Kingdom	10.977	13.714	16.000	30.456	32.173	n.a.	0.733	0.706	n.a.	1.661	1.289	n.a.
COMMUNITY	30.213	37.169	n.a.	68.736	74.871	n.a.	5.866	6.824	n.a.	5.442	4.885	n.a.

(A) Actual; (B) Estimates.

TABLE 14

PERSONNEL EMPLOYED UNDERGROUND
(yearly average)

27-Jul-93 (in thousands)

	1991 Actual	1992 Estimates	1993 Forecasts
Belgium	1.7	0.8	0.0
Germany	83.6	78.3	71.8
Spain	33.0	26.9	22.9
France	8.1	7.5	7.8
Portugal	0.6	0.5	0.6
United Kingdom	42.0	30.0 *	na
Ireland	0.3	0.0	0.0 *
Community	**169.3**	**144.0**	**na**

* Commission estimates

TABLE 15

OUTPUT PER MAN/HOUR UNDERGROUND

27-Jul-93 (Kg per man/hour)

	1991 Actual	1992 Estimates	1993 Forecasts
Belgium	383	268	
Germany	681	698	715
Spain	315	405	436
France	727	743	na
Portugal	na	na	na
United Kingdom	801	919 *	950 *
Community	665	726	na

* Commission estimates