

Official Journal

of the European Communities

Volume 20 No C 156

4 July 1977

English Edition

Information and Notices

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I

(Information)

COMMISSION

THE COMMUNITY COAL MARKET IN 1976 AND FORECASTS FOR 1977

I. SUMMARY SURVEY

1. The coal market in 1976

Against the background of an increase of around 5% in the Community's energy demand in 1976 over the previous year, coal's contribution to primary energy supplies remained proportionally about the same at between 19 and 20%, that of oil likewise at 55% and that of gas rose by 0.6 to 17% (Table 1). The total contribution of solid fuels was between 22 and 23% including lignite and peat, the same as the year before.

In 1976, coal consumption rose to 267 mtce (million tonnes of coal equivalent) compared to 252 mtce in 1975. However, there were contradictory developments: the requirements of the steel industry recovered by much less than had been expected, coal consumption for electricity generation far exceeded forecasts and reached its highest level since 1969, while the Community's coal industry pursued a policy of investment in productive capacity in spite of growing stocks of Community coal and/or rising coal imports from outside the Community.

Coal carbonized by cokerries decreased by 1.5 mtce against the previous year to 101.2 mtce in 1976. On the other hand, power stations consumed nearly 121 mtce compared to under 101 mtce in 1975. Other markets and uses in the Community absorbed around 45 mtce, about 4 mtce less than in 1975.

The drop in the quantity of coal carbonized by cokerries took place in the face of a recovery of coke consumption by the steel industry from 53.6 million tonnes in 1975 to close on 56 million tonnes in 1976. The reason is that coke production had substantially exceeded consumption during the previous year with the result that there had been a rapid build-up of coke stocks which continued in 1976, though at a reduced rate.

The spectacular increase in coal consumption for electricity generation was due to a combination of diverse causes. The most important of these were some measure of economic revival, relatively high fuel oil prices, a shortage of water for hydro-electric generation and governmental measures.

Community coal production in 1976 was about 228 mtce, a drop of 9 mtce from the previous year. The principal causes were some short-time working in Germany in response to market conditions and falling productivity in the UK.

Whereas in 1975, increases in costs of production were generally exceeded by rising receipts, the reverse was the case in 1976 except in Germany. However, the year witnessed a marked slowing down in cost escalation.

Contrary to forecasts, coal imports from third countries showed a further slight rise and exceeded 42 million tonnes in 1976. The most important reason was that a substantial proportion of the increase in power station coal consumption took place in member countries with

no or an inadequate coal industry who obtained growing supplies of steam coal from third countries at substantially lower prices than would have been available from Community sources.

Contract prices for good quality coking coal from the world market have generally remained firm at about \$ 63 cif ARA in spite of the continuing world recession in the steel industry, although spot quantities at lower prices have been on offer during the year. As a result, the prices of German coking coal were not much out of line with the former.

On the other hand, electricity undertakings have been able to import substantial quantities of third country power station coal at around \$ 30 to 33 cif ARA, with a tendency towards increases of about \$ 5 towards the end of the year. Although a substantial proportion of Community coal was competitive with oil, it could not generally compete with these prices.

With production at 228 mtce and imports at 42 mtce, total quantities of coal available, excluding stocks carried over, were 270 mtce in 1976, compared to consumption of about 267 mtce plus a small volume of exports to third countries. This is a big reduction in the excess of availability over requirements compared to the previous year to be put to stock, but a rise of five million tonnes in producers' coke stocks must also be taken into account.

2. The coal market outlook for 1977

The uncertainties surrounding the progress of economic recovery in 1977, and in particular that of the steel industry, are reflected in the prospects for coal for 1977.

When the coal and coke balances for 1977 were calculated (see annex), an increase of two million tonnes of coke to 58 million tonnes representing 75 mtce of coal were assumed. However, by the date of going to press (31 March 1977) it has become apparent that this figure is too high and must be revised downward. This will be done in the usual autumn revision of the report.

Although a repetition of last year's shortage of water for hydro-electric generation is unlikely, it is expected that coal consumption by power stations will be slightly higher than in 1976. The reasons are that other factors operating last year are of a more than transitory nature and will be reinforced by deliberate policies.

Other coal consuming sectors must be expected to continue their contraction. Nevertheless, this might be temporarily halted during periods of vigorous economic revival leading to increased demand for coal and coke for general industrial purposes.

Total Community coal production might reach 229 mtce, an increase of 1 mtce over that of last year. However, this is conditional on increased productivity in the UK.

A reversal of the downward drift in productivity in the UK coal industry is of great importance in view of that industry's leading position as a supplier of Community power station coal. A high proportion of UK coal output could remain competitive and thus provide an attractive fuel not confined to the British electricity generating industry.

Regarding coal imports from third countries, indications are that 1977 will witness a further slight rise to around 45 to 46 million tonnes. The largest increase will be to France followed by Denmark and Italy.

With production and imports totalling about 275 mtce against consumption and exports some 5 mtce below this figure, a further rise in coal stocks must be expected.

The rising level of imports in the face of the difficulties of the Community's coal industry to dispose of its production is giving rise to concern. While an orderly development of coal imports, particularly where these replace oil for electricity generation, is desirable, it would be contrary to the Community's long-term interests if such a development led to a permanent reduction in the Community's primary energy production capacity.

II. GENERAL ECONOMIC SITUATION AND OUTLOOK

(Table 2)

After dropping by 2.3% in 1975 as against the previous year, the Community's gross domestic product in real terms was some 4.5% higher in 1976 as a result of a modest rise in home demand. However, due largely to the situation in the investment goods industries, under-used productive capacity decreased little in spite of a growth in industrial production of about 7%.

The incipient growth in the steel industry during the first half of the year was not maintained and was succeeded by new symptoms of recession. Likewise, the capital goods and building industries — apart from owner occupied housing — showed low levels of activity throughout 1976. Such industrial growth as there was has primarily been in durable consumer goods such as motor car production which was 17% above the previous year's level.

In the labour market, these developments have achieved no more than to slow down the deteriorating trend of the previous year. The number of fully unemployed remained high throughout the year and an earlier ten-

dency towards a reduction of short-time working was reversed in the autumn. Average unemployment stood at around 4.6% in 1976 compared to 4% in 1975.

The rise in internal prices accelerated again during the second half of 1976 in spite of successful anti-inflationary measures in a growing number of member countries. The average rise in consumer prices in the Community exceeded 10%, having been 12.5% in 1975.

The Community's external balance of payments deteriorated in the autumn. The deficit for the whole year was of the order of 8.3 billion dollars in spite of persistent large surpluses by Germany and the Netherlands. This compared to a surplus for the Community of 1.5 billion dollars in 1975.

Prospects for 1977 are extremely uncertain. However, provided the stabilization policies in the deficit countries prove successful and economic trends in the surplus countries in and outside the Community do not weaken too greatly, it can be expected that the Community's gross domestic product will increase by about 3.5% in real terms in 1977.

III. COAL DEMAND BY SECTORS

(Table 3)

1. Steel industry and other coke users

(Tables 4 to 7)

In 1975 the steel industry suffered its most severe world-wide recession in 30 years, followed by some recovery in 1976. However this proved to be weaker than appeared initially.

While steel production in 1976 showed an increase over the previous year in all member countries, this was below expectations except in Italy and the United Kingdom, but against this must be set substantial shortfalls in France, Germany, Belgium and Luxembourg. As a result, total steel production in 1976 was below 135 million tonnes, a rise of 10 million tonnes over the dismal 1975 figure but more than three million tonnes short of original forecasts.

Two reasons for this disappointing development stand out. In the first place, the revival in consumer demand in 1976 did not lead to a comparable rise in investment in capital goods. Secondly, the Community's exports of steel and capital goods fared less well than those of some other countries, notably Japan.

Forecasts of steel production in the Community for 1977 are exceedingly cautious. Initially 138 to 139 million tonnes were mentioned but it has meanwhile become apparent that these figures and those in Tables 4, 6 and 7 must be revised downwards.

Since the substantial drop in specific coke consumption (Table 5) in 1975 as against the previous year due to relatively lower prices of fuel oil for injection into blast furnaces, there have been no very significant changes in this respect. For the Community as a whole, specific

coke consumption decreased by about 1% from 1975 to last year, and a comparable drop can again be expected for 1977.

In line with the foregoing, coke consumption by the iron and steel industry (Table 6) in 1976 was about 56 million tonnes.

As regards demand for coke by industries other than iron and steel (Table 7), this has been stable at around five million tonnes since 1975 and is likely to remain at about this level in 1977. On the other hand, its use for domestic heating continues to shrink and will probably be below six million tonnes in 1977.

Under coking coal Decision 73/287/ECSC, financial aids for Community coking coal would have progressively decreased from the current year onward. However, the Council has assented to a decision by the Commission to maintain the aids at their full level to 1979.

2. Power stations

(Tables 8A and 8B)

The unprecedented phenomenon of a decline in absolute terms in electricity requirements in some member countries in 1975 was reversed in 1976. As a Community average, the renewed rise amounted to 7%. This strongly suggests that the fall in 1975 was largely due to the severe recession that year, with energy economy measures playing only a minor part.

In 1976, nuclear generation was close on 8 TWh higher than the year before but due to shortage of water, hydraulic generation was nearly 17 TWh lower. To fill the gap and satisfy increased demand, conventional thermal generation rose by close on 87 TWh. By far the largest part of this increase was met by a 20% rise in coal consumption to 121 mtce in 1976 compared to a rise of about 5% in oil consumption and a stabilization in gas consumption.

The following have been the most important factors leading to increased solid fuel consumption for electricity generation in 1976:

- economic revival,
- relatively high fuel oil prices,
- shortage of water for hydro-electric generation,
- governmental measures.

The shortage of water for electricity generation, combined with a ceiling on oil consumption imposed by the

government, has played a particularly significant role in France, where it is reflected in an increase in coal-burn of nearly 60% from about 9.5 mtce in 1975 to 15 mtce in 1976.

Governmental intervention of legislation have been largely responsible for an increase of around 25% in coal consumption by Belgian and German power stations, in the latter from 26.3 mtce to nearly 34 mtce. However, it is arguable that a proportion of the German increase would, in any event, have taken place to satisfy rising electricity demand on the one hand and, on the other, to make up a loss of generating availability at a large nuclear power station.

In Belgium, the coal industry received additional subsidies to enable it to sell some of its lower grade surplus coking coal cheaply to electricity producers. In Germany, legislation has allowed electricity producers to pass on to consumers the higher costs resulting from the use of Community coal instead of other fuels.

As explained in Section VII dealing with intra-Community exchanges and coal imports, in the other member countries except the UK, Community coal benefited to only a limited extent from this recovery of the power station market.

In 1977, electricity demand will probably increase by between 6 and 7% over 1976, but continuing uncertainties regarding the economic situation make this no more than a tentative figure.

It seems likely that coal consumption for electricity generation in 1977 will be of the order of 124 mtce. No quantitatively very significant changes are expected in any Member State although a probable rise of some 0.5 mtce in Italy represents an increase of nearly 44% for that country. In spite of prospects for hydro-electricity near average in France for 1977, coal consumption there may rise by a further 1 mtce over that of 1976, partly as a result of the ceiling on oil consumption imposed by the government. Likewise, it will probably be about 2 mtce above the 1976 level in the United Kingdom.

In 1976, lignite and peat consumption by power stations, mostly lignite in the Cologne/Aachen area of Germany, was about 35 mtce compared to 32 mtce the previous year. This development exceeded forecasts by close on two million tonnes, and consumption of the same order of magnitude is expected again for 1977.

To promote coal-fired electricity generation with a view to confining the growth in oil requirements for meeting rising electricity demand from conventional sources in the 1980's the Commission has proposed the provision of funds from the EEC budget towards the construction, modernization or conversion of coal-fired generating capacity totalling 30 GW.

3. Various industries

(Table 9)

The market for the industrial use of coal and coke outside the steel and electricity generating industries continues its tendency to contract although this does not exclude the possibility of an occasional slight revival in the train of an economic upturn. However, no significant reversal of this trend is foreseeable in the absence of substantial technical improvements in solid fuel handling and combustion equipment or of a drastic change in price relationships between solid fuels and hydrocarbons to compensate the greater convenience of the latter, particularly for small to medium users. The only member countries in which solid fuels still retain an industrial market of some significance are the United Kingdom, Germany, France and Belgium.

As in other fields, consumption at 16.6 million tonnes in 1976 fell short of original forecasts. The total expected for 1977 is likely to be of the same order of magnitude.

4. Domestic

(Table 10)

The market for domestic solid fuels continues to shrink. However, it remains important in the UK, Germany, France, Belgium and Ireland where consumption totalled about 35.2 mtce in 1976 out of 36 mtce for the whole Community. The contraction in domestic demand is less marked for patent fuels than for coal and coke and for lignite briquettes, due at least in part to various smoke emission regulations. In fact, patent fuel sales in the United Kingdom are presently stable at about 1.2 mtce, and may also have reached stability at around the same level in Germany. However, for the present, their largest market continues to be in France.

To an even greater extent than in general industry, the convenience of the use of oil, gas and electricity make these so attractive for domestic use compared to solid fuels that only great technical advances or extreme developments in their relative prices are likely to reverse current trends. Total consumption of solid fuels in 1977 is expected to be around 33.2 mtce.

IV. COMMUNITY COAL PRODUCTION

1. Production statistics

Except for most German production, the producer countries' statistics generally show coal output on a tonnes by weight basis ($t = t$). To allow comparisons with statistics published in producer countries, the production figures in Table 11 are shown in $t = t$ and for Germany additionally the national statistics in brackets.

(a) *Quantitative analysis of output* (Tables 11 and 12)

Community coal production in 1976 was about 248 million tonnes (228 mtce), a drop of nine million tonnes or 3.6% below 1975. At the beginning of 1976, production for the year had been forecast at about the same level as that for 1975 but this turned out to be over-optimistic.

The largest shortfall in production against forecasts was in the UK, where it exceeded seven million tonnes or near 6%, while in the other coal producing member countries the shortfall averaged 2%. The net drop in UK production against the previous year was over five million tonnes and would have been larger but for an increase of 1.5 million tonnes in opencast and small private licenced mine production.

In the case of Germany, short-time working in response to market conditions was the largest factor in the drop in production of about three million tonnes in 1976, whereas in the UK it was mainly connected with falling productivity. There had been virtually no change in total French coal production.

Current plans for Community coal output for 1977 are that this will be of the same order as that of 1976 and amount to around 248 million tonnes (229 mtce).

(b) *Manpower and productivity* (Tables 13 and 14)

The year 1976 has witnessed a reversal of the previous two years' trend of an increase in underground manpower. The drop has been slightly larger than expected, amounting to some 10 000 men or 3%.

This reduction in manpower has largely been brought about by not fully replacing natural wastage. By comparison, redundancies due to pit closures have played a very minor role.

Except in the case of Belgium, the development of productivity in 1976 differed considerably from what had been expected. In Germany, it rose by some 2.2% instead of dropping, in France it rose by only 0.9% instead of the ambitious target of an increase of 8.8%, while in the UK it dropped by 2.7% instead of rising by 3%.

In the case of France, the key to overall productivity underground lies in the performance of the Lorraine coalfield. Provided production there is not disrupted, the high levels of productivity achievable in this coalfield profoundly affect the statistical picture for French coal production as a whole. Unfortunately, production was disrupted in this coalfield in 1976 by a serious colliery accident at Merlebach.

The disappointing level of output per underground manshift in the UK has been due to more general causes. The principal of these is reckoned to have been the fact that the productivity incentive scheme in operation so dilutes rewards as to provide little stimulus for individual and team effort.

In the case of Belgium and Germany, productivity forecasts for 1977 are not greatly out of line with performance in 1976. On the other hand, the forecasts for France and the UK are for dramatic improvements over last year, the former based on the assumption of the Lorraine coalfield operating to its full potential and the latter on the introduction of an effective productivity incentive scheme during the second half of 1977.

2. Financial developments

(a) *Production costs and trading receipts* (Table 15)

Whereas in 1975, increases in costs of production per tonne were amply exceeded by rises in receipts per tonne in Belgium, Germany and the UK, the situation developed differently in 1976. During that year, the rise in revenue exceeded increases in costs only in Germany, whereas the reverse was the case in the three other coal producing member countries.

In the case of Belgium, the country with the widest differential between the evolution of costs and receipts per tonne, the situation resulted to a considerable extent from spot offers of American coking coal at highly attractive prices, taken up in preference to indigenous coal by the steel industry. In addition to their quantitative impact, these spot offers exerted heavy pressures on prices obtainable for Belgian coking coal, some of which was diverted into power stations at steam coal prices to avoid excessive stocking.

As during the previous two years, production costs per tonne in terms of national currencies rose at a faster rate in the UK in 1976 than in the other coal producing member countries. However, to compare costs at any given moment between member countries, the UK figures require adjustment in the light of the depreciation of sterling against the currencies of the other coal producers during this period. Nevertheless, the British coal industry's financial position was adversely affected by the downward drift in underground productivity since 1975.

Indications are that both the German and British coal industries have been operating at a profit in 1976, although in the UK, wide regional differences blur the realities underlying such national averages. However, both industries face financial problems in 1977. In Germany, these arise, at least in part, from growing producers' stocks of coal and coke, while in the UK, adverse factors are represented by pressures on costs of production resulting from improved underground workers' retirement conditions, coupled to the fact that an effective productivity incentive scheme which may be introduced can affect output during only part of the year.

(b) *Financial interventions by Member States* (Table 16)

In view of different policies pursued by member governments over the years in matters such as covering losses or the treatment of social charges or expenditure subsequent on pit closures in earlier years and resulting from the new formulation of the aid system for the Community as from 1976, no figures can be given for financial interventions by the member states in 1976 comparable to those for 1975.

A further complicating factor is the different systems under which the electricity generating industry uses competitively produced Community coal. These range from coal sold to the electricity undertakings at a competitive price, the coal producer being compensated

through subsidies, to coal sold at prices covering costs of production, with the electricity generating concern recouping itself by passing the extra costs to the consumer.

3. Developments in productive capacity

(a) *Investment* (Table 17)

The figures for investment in 1976 highlight a problem common to many industries but particularly marked in deep coal mining. This is the need to make investment decisions on the basis of long-term assessments of the market and either to maintain these regardless of short- to medium-term market developments or to write them off at enormous loss.

The investment plans by the Community's coal industry formulated in 1974 and mentioned in the Commission's report on the general coal market situation for that year (OJ No C 116 of 1975) are reflected in a steady rise in investment expenditure from 324 million units of account in 1974 to 538 million units of account in 1975 to a peak of 596 million units of account in 1976. Although inflation has played a part in this increase, its effect on figures expressed in units of account is much less than on figures expressed in the national currencies of certain member states.

In 1976, the UK maintained its lead in investment relative to current output at 2.8 units of account per tonne, followed by Germany at 2.1 units of account per tonne and by France and Belgium at around 1.9 units of account per tonne. Current forecasts for 1977 are that these relationships will not change drastically in the UK and France but that reduced investment is to be expected in Germany and, particularly, in Belgium. How-

ever, it should be noted that the forecasts exclude investment not yet formally decided but which might, nevertheless, be initiated during the year.

The high level of investment in UK coal production mirrors the industry's faith in the possibility of exploiting its large, geologically favoured coal resources on terms which will continue to make it attractive to the power station market into the next decade and beyond.

On the other hand, investments in the German coal industry — mainly in the Ruhr, in France — largely in Lorraine — and in the Campine coalfield in Belgium are based primarily on the expectation of long-term demand for good coking coal at commensurate prices, with the prospects of the power station market playing a secondary role.

(b) *Pit closures* (Table 18)

Pit closures rose from eight in 1975 to 11 in 1976. However, except for three pits in the Ruhr, they have all been small, averaging about 140 000 tonnes recent annual production.

On the other hand, the three mines in the Ruhr closed in 1976 represented total production of 3.7 million tonnes. However, two of these closures were matters of technical rationalization and will not entail a loss of productive capacity. The third pit, for which a substantial investment programme had been decided in 1975, was abandoned after a large roof-fall — this closure has resulted in lost productive capacity of 0.8 million tonnes a year.

No pit closures are presently planned in Germany for 1977. The only important closure in the Community currently known will be in the Nord/Pas-de-Calais coalfield of France and represents an annual loss of production of 0.7 million tonnes.

V. COAL PRICES

1. Coal price developments

(Tables 19 and 20)

Since the large price increases in 1974, rises in the list prices of Community coals have been progressively slackening. In Germany, they remained stable throughout 1976.

Tables 19 and 20 show price movements of selected comparable qualities of coal from various Community

coalfields from January 1976 to January 1977, the first in national currencies and the second in US \$ to facilitate comparison with prices of other forms of energy.

As in previous years, the widest differences in prices of Community products apart from coke were between the UK and the other coal producing member countries. In 1976, British coal was again subject to the largest price increases, ranging from 13 to 22%. Prices of steam coals from the Lorraine coalfield were increased by 9%

and Belgian anthracite prices were increased by 3 to 10%. List prices of coking coal from the Nord/Pas-de-Calais coalfield were reduced respectively by 11 and 9%.

2. Coking coal

The medium price cif ARA for third country coking coal, the so-called indicative price calculated by the Commission, reached a peak of \$ 63.80 per tonne in October 1975. Since then it has remained practically unchanged around \$ 63 for a total quantity of about 14 million tonnes.

However, some importers have been able to secure coking coal in the spot market at cif prices of around \$ 50. Combined with other signs of weakness in the market, these imports exerted disproportionate pressures on the sales and prices of certain Community coals.

3. Steam coal

Electricity generating undertakings have been able to import third country steam coal at cif prices of around \$ 30 to \$ 33 per tonne of coal equivalent throughout most of 1976, but with a tendency to a rise of up to \$ 5 at the end of the year. This price level limited the possi-

bility of disposing of Community steam coal at a distance from the pithead and, above all, on an intra-Community basis.

Prices of heavy fuel oil and gas, which generally form part of alignment calculations for the sale of indigenous coal to the electricity generating industry, were substantially above those of third country coal. However, the difference in operating costs between the fuels narrows the effective price difference.

4. Domestic solid fuels

The price situation in this sector changed little in 1976. While supplies of inexpensive Community products continue to shrink as they tend to be uneconomic to produce, the more expensive solid fuels are challenged in their market by supplies from third countries and by other forms of energy.

5. Outlook for 1977

The market is subject to conflicting tendencies; nevertheless some upward price adjustments in different sectors seem possible.

VI. COKE

1. Development of coking capacity

(Table 21)

In line with a long-standing trend of shifting coke production from the coal industry and independent producers to the steel industry, the coking capacity of the latter rose by 1.8 million tonnes or some 4% to 46.6 million tonnes in 1976. Additional steel industry coking capacity ranging from 0.6 million tonnes to 0.8 million tonnes came into operation in Germany, Italy and the UK that year, but there were slight reductions in the coking capacities of the Belgian and French steel industries.

On the other hand, in spite of the extremely difficult market conditions for coke, the increased capacity of the steel industry was not matched by closure of coke ovens belonging to the coal industry and independent producers. In fact, the capacity of these two groups combined fell by a mere 0.4 million tonnes.

The same general tendency will continue in 1977. However, the rise in the steel industry's coking capacity will be smaller and largely confined to the UK. On the other

hand, two cokeries belonging to Ruhrkohle are scheduled for closure this year and a cokery in the Nord/Pas-de-Calais area was closed down at the end of 1976. Total Community coking capacity will remain virtually unchanged at 92 million tonnes per annum.

2. Coke production and coal supplies to cokeries

(Tables 22 and 23)

Two factors combine to make coke production highly inelastic in response to demand: the technical impossibility of extinguishing and then relighting coke batteries without largely rebuilding them and the fact that coke is less liable to lose its desired metallurgical properties during storage than coal.

As a result, variations in demand are reflected to a very much greater extent in fluctuating coke stocks than in coke production. In fact, this dropped by little more

than six million tonnes from the steel industry boom year of 1974 to 1976, in spite of a drop in coke consumption by that industry of some 12 million tonnes during the same period.

However, this difference between the fall in total demand and the combined coke production of all producers does not reflect the full scale of the difficulties of the Community's coking coal industry in 1976. As far as possible, the steel industry attempts to maintain its own coking facilities in full operation during periods of low levels of activity and reduce coke purchases from other sources, thereby giving rise to disproportionate increases in the coal industry's coke stocks. In fact,

these rose from 2.4 million tonnes at the end of 1974 to 16 million tonnes at the end of 1976.

Furthermore, whereas the Community coal industry's coke ovens are supplied from its own coal production, those of the steel industry rely to a large and growing extent on third country coking coal. During periods of recession there is thus an inbuilt tendency for the steel industry's consumption of coke made from Community coal to be reduced more severely than of coke made from third country coal.

Production of coke in 1977 is likely to be slightly below that of the previous year and is expected to be around 75 million tonnes.

VII. TRADE IN COAL AND COKE

1. Intra-Community trade

(Tables 24 and 25)

This trade is primarily a matter of deliveries of German coking coal and coke for use by the Belgian, French, Italian, Luxembourg and Netherlands steel industries. In addition, supplies of electricity coal from the Saar area of Germany to power stations across the French border in Lorraine and of British coal to other Community countries, also mainly for electricity generation, have some importance.

The serious recession in the Community's steel industry in 1975 resulted in a severe slump in deliveries of German coking coal and, particularly, of coke to other Community countries — the special reasons for the latter are explained in Section VI (2) above. Indications early in 1976 suggested a turn-round that year but these hopes were destroyed by the extremely disappointing performance of the steel industry during the second half of 1976, aggravated by availability from the US of spot quantities of coking coal at highly attractive prices.

The decrease in intra-Community trade in coal of about 1.5 million tonnes from 1975 to 1976 was primarily due to a drop in deliveries from Germany, mainly from the Saar to France of some 0.9 million tonnes, and from the Ruhr to the Netherlands of 0.2 million tonnes. One-third of the former resulted from the reduction of deliveries to French power stations due to the expiry of contracts — these were not renewed on account of price in spite of the fact that consumption by the French electricity generating industry in 1976 was far above that of the previous year.

The remainder of the drop in sales of German coal to these two countries, as of decreases in German coke sales of over 0.3 million tonnes are the combined result of low demand by the steel industry and of increased coal imports from third countries. Compared to 1974, deliveries of German coke to other Community countries had shrunk by 3.2 million tonnes or nearly 40% in 1976.

While the decrease in intra-Community deliveries of coking coal and coke was, at least in some measure, a symptom of the continued depressed state of the steel industry in 1976, intra-Community trade in electricity coal also dropped in spite of the 20% increase in coal consumption for electricity generation explained in Section III (2). The root cause lay in the relatively high costs of production of much Community coal compared to that available from third countries, combined with the fact that support measures for indigenous coal, where they exist, exert little influence on intra-Community deliveries of power station coal.

2. Imports from third countries

(Tables 26 and 27)

Contrary to expectations, 1976 did not see a reversal of the rising import trend registered during the previous two years. Total imports from third countries in 1976 amounted to about 42.2 million tonnes, compared to 41.1 million tonnes the year before and to about 30 million tonnes in 1973. Imports are expected to rise further in 1977 to between 45 and 46 million tonnes.

Third country imports of coal destined for power stations underwent some complex developments in 1976.

As the table shows, there have been increases in France, Italy and the Netherlands in line with these countries' greater call on coal-fired electricity generation. In the case of France, some quantities of third country coal ordered by the UK electricity generating industry in 1974 and stored in other member countries in 1975, were transferred to French power stations in 1976.

The drop in third country imports of power station coal into Denmark, Germany and the UK likewise requires comment. In the case of Denmark, after a period of heavy stock building, this largely ceased in 1976. In Germany, new legislation in favour of Community coal was instrumental in effecting a switch to this, while in the case of the UK, third country imports had been swollen in 1975 through the execution of contracts made during the coal strike the previous year.

In spite of some very attractively priced US coal available on the spot market, total imports from that coun-

try have continued to remain behind those from Poland which has maintained first place among the Community's external supplies of coal. In part, this position is connected with credits extended, in one form or another, by several Community countries for the purchase of capital goods for Polish industry on the understanding that these would at least partially be repaid through deliveries of coal.

Since 1975, the USSR has lost its previous position as the Community's third largest external supplier of coal. The reasons are the stagnant or contracting markets for Russian coal, primarily in the general industrial and domestic sectors.

For the past two years, third place amongst the Community's external suppliers has been occupied by Australia but this position is likely to be taken by South Africa in 1977. Imports of power station coal from that country doubled from 1.7 million tonnes in 1975 to 3.4 million tonnes in 1976 and are likely very nearly to double again next year.

VIII. COAL AND COKE STOCKS

(Tables 28 and 29)

The usual consolidated table of the Community coal producers' stocks of coal and coke oven coke has been supplemented by separate tables showing respectively stocks of coal and coke.

In addition, in view of the rising importance of coal for electricity generation and of its place as a factor of diversification and security in the Community's primary energy supplies, a new table has been introduced showing coal stocks at power stations. This table gives end of year stocks and indicates how many days average consumption during the past year these represent.

There is no independent yardstick by which to measure a satisfactory level of stocks. However, in the light of the uncertainties in the energy market which have surfaced since 1973, it appears prudent to carry larger stocks of coal and coke, in particular the former, than were considered desirable during the previous 20 years.

1. Producers' coal and coke stocks

(Table 28)

Compared to 1975 when producers' coal stocks in the Community as a whole more than doubled, their rise in 1976 was less steep having been of the order of 6%.

However, movements in producers' stocks were spread very unevenly among member countries. While they changed little in the UK and dropped by some 20% in France, they rose by over 25% in Germany and by some 40% in Belgium. The basic factor underlying these differences was the weakness of the market for coking coal in contrast to buoyant coal demand for electricity generation.

This factor is further underlined by the growth in producers' unsold supplies of coke by close on 40% to some 18 million tonnes. Of these, some 12.8 million tonnes lay with German producers at the end of the year, a rise of about 50% in 12 months.

Although, as in the case of coal stocks, the increase in unsold supplies of coke in 1976 was much smaller than it had been the previous year, it was large both by comparison to annual coke production and to the rise in coal stocks. The reasons for this are explained in Sections III (2) and VI (2).

To lighten the financial burdens imposed on the German coal industry of carrying large stocks, the government has taken over financial responsibility for some of these as a federal reserve. At the end of 1976, this amounted to some 5.2 million tonnes of coal and three million tonnes of coke. However, for statistical purposes, these continue to be treated as producers' stocks.

Furthermore, the Commission has submitted a proposal to the Council to finance up to 30% of the cost of half the producers' coal and coke stocks up to a maximum of 20 million tonnes from the Community budget.

2. Coal stocks at power stations

(Table 29)

In 1975 the Council agreed to a Regulation requiring both oil and coal-fired power stations to carry 30 days supplies of their respective fuels.

However, Table 29 shows that much larger stocks are usual and demonstrates the very different stocking policies pursued by the electricity generating industries

in various member countries ranging from two months supplies in Germany to a year's supplies carried in Denmark. In part, the different policies are determined by whether the power station's coal supplies are mined close by or have to be shipped over long distances.

As absolute quantities, the UK power station stocks of some 19 million tonnes are by far the largest, but in terms of average daily consumption, they lie about in the middle of the various member countries. Of these stocks, approximately one-third is financed by the coal industry.

In the Community as a whole, total coal stocks at power stations rose by under 2% in 1976, compared to a rise in coal consumption of 20%. However, very different developments in coal consumption and in stocks in the member countries do not permit the general conclusion to be drawn that there has been a deterioration in the security of the Community's power station coal supply position.

On the other hand, it should be borne in mind that the number of day's supplies carried at power stations shown in Table 29 refers to consumption in 1976, a year well below maximum potential industrial activity and free from serious disturbances in the energy market. A brisk upturn in the economy or substantial dislocation in the Community's energy supply pattern could lead to higher utilization of coal-fired generating capacity in which case the stocks would be consumed at a considerably faster rate than indicated in the table.

TABLE I

Shares of the various forms of primary energy in gross internal energy consumption
(in %)

1975	Coal and equivalent	Brown coal and equivalent	Oil and equivalent	Natural gas	Primary electricity	Other fuels	Total
Belgium	22.9	—	53.2	20.3	3.5	0.1	100.0
Denmark	12.3	—	86.5	—	1.2	—	100.0
Germany (FR)	19.7	10.1	51.2	14.4	4.3	0.3	100.0
France	15.4	0.5	63.6	9.5	10.9	0.1	100.0
Ireland	7.3	13.2	77.4	—	2.1	—	100.0
Italy	6.2	0.3	70.2	14.6	8.5	0.2	100.0
Luxembourg	44.0	0.4	29.4	8.0	18.2	—	100.0
Netherlands	4.1	—	40.2	54.5	1.2	—	100.0
United Kingdom	35.7	—	44.4	15.7	4.2	—	100.0
Community	19.6	3.0	55.0	16.4	5.8	0.2	100.0
1976 (provisional)							
Belgium	22.3	—	54.4	19.9	3.3	0.1	100.0
Denmark	14.0	—	85.1	—	0.9	—	100.0
Germany (FR)	20.0	9.3	52.4	14.3	3.7	0.3	100.0
France	15.9	0.5	65.3	9.9	8.4	—	100.0
Ireland	6.5	14.7	76.2	—	2.6	—	100.0
Italy	6.2	0.3	69.6	16.6	7.1	0.2	100.0
Luxembourg	33.1	0.2	44.8	7.2	14.7	—	100.0
Netherlands	4.8	—	39.2	54.5	1.1	0.4	100.0
United Kingdom	35.9	—	42.7	16.6	4.8	—	100.0
Community	19.7	2.9	55.1	17.0	5.1	0.2	100.0

TABLE 2

A. Gross domestic product in terms of volume
(% variation compared with previous year)

	1975 (actual)	1976 (provisional)	1977 (forecasts)
Belgium	- 2.0	+ 3.5	+ 3.0
Denmark	- 1.0	+ 4.8	+ 2.0
Germany (FR)	- 3.5	+ 5.4	+ 5.0
France	- 1.3	+ 5.0	+ 3.0
Ireland	- 0.5	+ 3.5	+ 3.5
Italy	- 3.7	+ 5.8	+ 2.0
Luxembourg	- 7.7	+ 2.9	+ 3.0
Netherlands	- 0.9	+ 3.6	+ 4.0
United Kingdom	- 1.3	+ 0.9	+ 1.5
Community	- 2.2	+ 4.3	+ 3.5

B. Trend of industrial production
(% variation compared with the previous year)

	1975 (actual)	1976 (provisional)	1977 (forecasts)
Belgium	- 9.8	+ 9.0	+ 3.0
Denmark	- 4.0	+ 4.5	+ 3.0
Germany (FR)	- 6.2	+ 6.8	+ 6.5
France	- 7.2	+ 8.8	+ 2.5
Ireland	- 6.2	+ 12.0	+ 6.0
Italy	- 8.9	+ 11.5	+ 3.5
Luxembourg	- 21.9	+ 6.4	+ 6.0
Netherlands	- 4.5	+ 7.3	+ 5.5
United Kingdom	- 4.9	+ 1.8	+ 4.5
Community	- 6.6	+ 7.1	+ 4.5

TABLE 3

Community's coal consumption by sector

(in 1 000 tonnes of coal equivalent)

	1975 (actual)	1976 (estimates)	1977 (forecasts)	1976/1975 %	1977/1976 %
Coke-ovens	102 755	101 230	99 700	- 1.5	- 1.5
Thermal power stations	100 601	120 887	124 277	+ 20.2	+ 2.8
Iron and steel industry	2 673	2 700	2 905	+ 1.0	+ 7.6
Other industries	12 672	11 640	12 625	- 8.1	+ 8.5
Domestic heating	22 881	20 731	19 125	- 9.4	- 7.7
Briquettes	6 204	5 250	5 045	- 15.4	- 3.9
Gasworks	1 826	1 370	1 265	- 25.0	- 7.7
Consumption for production	2 489	2 725	2 825	+ 9.5	+ 3.7
Others	186	250	235	+ 34.4	- 0.6
Total	252 287	266 783	268 002	+ 5.7	+ 0.5

TABLE 4

Pig iron production

(in 1 000 tonnes)

	1975 (actual)	1976 (estimates)	1977 (forecasts)	1976/1975 %	1977/1976 %
Belgium	9 180	9 961	10 275	+ 8.5	+ 3.2
Denmark	-	-	-	-	-
Germany (FR)	30 074	31 849	33 350	+ 5.9	+ 4.7
France	17 921	19 027	19 000	+ 6.2	- 0.1
Ireland	-	-	-	-	-
Italy	11 412	11 696	12 500	+ 2.5	+ 6.9
Luxembourg	3 889	3 756	4 125	- 3.4	+ 9.8
Netherlands	3 970	4 265	4 300	+ 7.4	+ 0.8
United Kingdom	12 138	14 090	14 750	+ 16.1	+ 4.7
Community	88 584	94 644	98 300	+ 6.8	+ 3.9

TABLE 5

Specific coke input in blast furnaces

(in kilograms per tonne)

	1975 (actual)	1976 (estimates)	1977 (forecasts)
Belgium	545	542	540
Germany (FR)	497	485	480
France	531	520	510
Italy	479	475	475
Luxembourg	525	490	485
Netherlands	467	450	450
United Kingdom	609	580	575

TABLE 6

Consumption of coke-oven coke in the iron and steel industry

(in 1 000 tonnes)

	1975 (actual)	1976 (estimates)	1977 (forecasts)	1976/1975 %	1977/1976 %
Belgium	5 721	6 160	6 325	+ 7.7	+ 2.7
Denmark	29	40	40	+ 38.0	—
Germany (FR)	17 863	18 500	19 000	+ 3.6	+ 2.7
France	10 580	11 000	10 935	+ 4.0	— 0.6
Ireland	—	10	10	—	—
Italy	6 277	6 390	6 870	+ 1.8	+ 7.5
Luxembourg	2 343	2 175	2 235	— 7.2	+ 2.8
Netherland	2 081	2 065	2 150	— 0.8	+ 4.1
United Kingdom	8 703	9 590	10 130	+ 10.2	+ 5.6
Community	53 592	55 930	57 695	+ 4.4	+ 3.2
<i>Detail:</i>					
Input in blast furnaces	46 264	48 460	49 615	+ 4.7	+ 2.4
Sintering	6 926	6 915	7 560	— 0.2	+ 9.3
Others	407	555	530	+ 36.3	— 4.5

TABLE 7

Community coke-oven coke consumption by sector

(in 1 000 tonnes)

	1975 (actual)	1976 (estimates)	1977 (forecasts)	1976/1975 %	1977/1976 %
Iron and steel industry	53 597	55 940	57 695	+ 4.4	+ 3.1
Other industries	4 852	5 002	4 977	+ 3.1	- 0.5
Domestic heating	6 554	6 303	5 873	- 3.8	- 6.8
Others	1 119	850	770	- 24.0	- 9.4
Total	66 122	68 095	69 315	+ 3.0	+ 1.8

TABLE 8 A
Nett electricity production

	1975 (actual)		1976 (estimates)		1977 (forecasts)	
	TWh	%	TWh	%	TWh	%
<i>Belgium</i>						
Thermal	32.2	82.6	35.0	78.1	35.2	75.2
Hydraulic	0.4	1.0	0.3	0.7	0.5	1.1
Nuclear	6.4	16.4	9.5	21.2	11.1	23.7
Geothermal	—	—	—	—	—	—
Total	39.0	100.0	44.8	100.0	46.8	100.0
<i>Denmark</i>						
Thermal	17.6	100.0	19.6	99.9	20.6	100.0
Hydraulic	—	—	—	0.1	—	—
Nuclear	—	—	—	—	—	—
Geothermal	—	—	—	—	—	—
Total	17.6	100.0	19.6	100.0	20.6	100.0
<i>Germany (FR)</i>						
Thermal	246.7	87.0	279.0	88.9	275.3	83.1
Hydraulic	16.8	5.9	12.5	4.0	17.7	5.3
Nuclear	20.2	7.1	22.4	7.1	38.3	11.6
Geothermal	—	—	—	—	—	—
Total	283.7	100.0	313.9	100.0	331.3	100.0
<i>France</i>						
Thermal	101.2	56.7	131.1	67.3	124.1	59.5
Hydraulic	59.9	33.6	48.7	25.0	60.2	28.9
Nuclear	17.4	9.7	15.0	7.7	24.3	11.6
Geothermal	—	—	—	—	—	—
Total	178.5	100.0	194.8	100.0	208.6	100.0
<i>Ireland</i>						
Thermal	6.6	90.4	7.3	89.3	7.4	89.2
Hydraulic	0.7	9.6	0.9	10.7	0.9	10.8
Nuclear	—	—	—	—	—	—
Geothermal	—	—	—	—	—	—
Total	7.3	100.0	8.2	100.0	8.3	100.0

	1975 (actual)		1976 (estimates)		1977 (forecasts)	
	TWh	%	TWh	%	TWh	%
<i>Italy</i>						
Thermal	92.6	65.7	108.7	69.9	114.4	69.0
Hydraulic	42.4	30.1	40.9	26.3	42.5	25.7
Nuclear	3.6	2.6	3.6	2.3	6.3	3.8
Geothermal	2.3	1.6	2.4	1.5	2.5	1.5
Total	140.9	100.0	155.6	100.0	165.7	100.0
<i>Luxembourg</i>						
Thermal	0.9	64.3	1.0	65.5	1.0	52.6
Hydraulic	0.5	35.7	0.5	34.5	0.9	47.4
Nuclear	—	—	—	—	—	—
Geothermal	—	—	—	—	—	—
Total	1.4	100.0	1.5	100.0	1.9	100.0
<i>Netherlands</i>						
Thermal	48.5	93.8	52.0	93.4	54.9	94.3
Hydraulic	—	—	—	—	—	—
Nuclear	3.2	6.2	3.7	6.6	3.3	5.7
Geothermal	—	—	—	—	—	—
Total	51.7	100.0	55.7	100.0	58.2	100.0
<i>United Kingdom</i>						
Thermal	222.7	87.7	221.8	86.0	225.0	84.6
Hydraulic	4.9	1.9	5.1	2.0	5.0	1.9
Nuclear	26.5	10.4	31.2	12.0	36.0	13.5
Geothermal	—	—	—	—	—	—
Total	254.1	100.0	258.1	100.0	266.0	100.0
<i>Community</i>						
Thermal	768.9	79.0	855.5	81.3	857.9	77.5
Hydraulic	125.7	12.9	108.9	10.4	127.7	11.5
Nuclear	77.3	7.9	85.3	8.1	119.3	10.8
Geothermal	2.3	0.2	2.4	0.2	2.5	0.2
Total	974.3	100.0	1052.1	100.0	1 107.4	100.0

NB: Differences due to rounding off.

TABLE 8 B

Fuel consumption by conventional power plants and coverage of requirements in %

	1975 (actual)		1976 (estimates)		1977 (forecasts)		% increase	
	1 000 tce	%	1 000 tce	%	1 000 tce	%	1976/1975	1977/1976
<i>Belgium</i>								
Coal	2 211	19.4	2 758	22.2	2 735	22.5	+ 24.7	- 0.8
Lignite	-	-	-	-	-	-	-	-
Oil products	5 031	44.2	5 426	43.6	4 868	40.1	+ 7.9	- 10.3
Natural gas	3 205	28.2	3 252	26.2	3 425	28.2	+ 1.5	+ 5.3
Other fuels	938	8.2	990	8.0	1 124	9.2	+ 5.5	+ 13.3
Total	11 385	100.0	12 426	100.0	12 152	100.0	+ 9.1	- 2.2
<i>Denmark</i>								
Coal	2 284	35.9	3 356	47.2	3 560	47.4	+ 46.9	+ 6.1
Lignite	-	-	-	-	-	-	-	-
Oil products	4 087	64.1	3 751	52.8	3 944	52.6	- 8.2	+ 5.2
Natural gas	-	-	-	-	-	-	-	-
Other fuels	-	-	-	-	-	-	-	-
Total	6 371	100.0	7 107	100.0	7 504	100.0	+ 11.6	+ 5.6
<i>Germany (FR)</i>								
Coal	26 345	29.5	33 915	34.4	33 500	33.3	+ 28.7	- 1.2
Lignite	29 955	33.6	32 907	33.3	32 900	32.8	+ 9.8	-
Oil products	9 526	10.7	9 994	10.1	10 700	10.6	+ 4.9	+ 7.0
Natural gas	18 378	20.6	17 349	17.6	18 400	18.3	- 5.6	+ 6.1
Other fuels	4 994	5.6	4 543	4.6	5 000	5.0	- 9.0	+ 10.1
Total	89 198	100.0	98 708	100.0	100 500	100.0	+ 10.7	+ 1.8
<i>France</i>								
Coal	9 481	28.5	15 014	34.3	16 120	38.3	+ 58.4	+ 7.4
Lignite	970	2.9	1 251	2.9	1 130	2.7	+ 29.0	- 9.6
Oil products	16 812	50.6	21 520	49.2	18 530	44.0	+ 28.0	- 13.9
Natural gas	3 640	11.0	3 410	7.8	3 605	8.6	- 6.3	+ 5.7
Other fuels	2 343	7.0	2 545	5.8	2 715	6.4	+ 8.6	+ 6.7
Total	33 246	100.0	43 740	100.0	42 100	100.0	+ 31.6	- 4.7
<i>Ireland</i>								
Coal	37	1.4	38	1.3	38	1.3	+ 2.7	-
Peat	843	32.1	966	33.5	960	32.6	+ 14.6	- 0.6
Oil products	1 744	66.5	1 881	65.2	1 947	66.1	+ 7.9	+ 3.5
Natural gas	-	-	-	-	-	-	-	-
Other fuels	-	-	-	-	-	-	-	-
Total	2 624	100.0	2 885	100.0	2 945	100.0	+ 9.9	+ 2.1

	1975 (actual)		1976 (estimates)		1977 (forecasts)		% increase	
	1 000 tce	%	1 000 tce	%	1 000 tce	%	1976/1975	1977/1976
<i>Italy</i>								
Coal	616	2.0	1 210	3.3	1 743	4.7	+ 96.4	+ 44.0
Lignite	486	1.6	463	1.3	529	1.4	- 4.7	+ 14.2
Oil products	25 920	83.7	28 140	78.1	28 707	77.0	+ 8.6	+ 2.0
Natural gas	2 434	7.8	4 500	12.5	4 757	12.7	+ 84.9	+ 5.7
Other fuels	1 513	4.9	1 717	4.8	1 564	4.2	+ 13.5	- 8.9
Total	30 969	100.0	36 030	100.0	37 300	100.0	+ 16.3	+ 3.5
<i>Luxembourg</i>								
Coal	10	2.2	1	0.2	11	2.2	-	-
Lignite	-	-	-	-	-	-	-	-
Oil products	117	25.8	98	21.1	143	28.7	- 16.2	+ 45.9
Natural gas	101	22.3	190	40.9	114	22.8	+ 88.1	- 66.7
Other fuels	225	49.7	176	37.8	231	46.3	- 21.8	+ 31.2
Total	453	100.0	465	100.0	449	100.0	+ 2.6	+ 7.3
<i>Netherlands</i>								
Coal	160	1.0	1 010	5.8	1 030	5.7	+ 531.3	+ 2.0
Lignite	-	-	-	-	-	-	-	-
Oil products	1 187	7.3	1 588	9.2	1 600	8.8	+ 33.8	+ 0.8
Natural gas	14 089	86.1	13 879	80.3	14 620	80.5	- 1.5	+ 5.3
Other fuels	912	5.6	818	4.7	900	5.0	- 10.3	+ 10.0
Total	16 348	100.0	17 295	100.0	18 150	100.0	+ 5.8	+ 5.0
<i>United Kingdom</i>								
Coal	59 457	71.0	63 585	76.0	65 540	77.6	+ 6.9	+ 3.0
Lignite	-	-	-	-	-	-	-	-
Oil products	20 489	24.5	16 806	20.1	16 340	19.3	- 18.0	- 2.7
Natural gas	3 130	3.7	2 694	3.2	1 920	2.3	- 13.9	- 28.7
Other fuels	704	0.8	560	0.7	700	0.8	- 20.5	+ 25.0
Total	83 780	100.0	83 645	100.0	84 500	100.0	- 0.2	+ 1.1
<i>Community</i>								
Coal	100 601	36.7	120 887	40.0	124 277	40.7	+ 20.2	+ 2.8
Lignite	32 254	11.8	35 587	11.8	35 519	11.6	+ 10.3	- 0.2
Oil products	84 913	30.9	89 204	29.5	86 779	28.4	+ 5.1	- 2.7
Natural gas	44 977	16.4	45 274	15.0	46 841	15.3	+ 0.7	+ 3.5
Other fuels	11 629	4.2	11 349	3.7	12 234	4.0	- 2.4	+ 7.8
Total	274 374	100.0	302 301	100.0	305 650	100.0	+ 10.2	+ 1.1

TABLE 9

Coal and coke-oven coke consumption in various industries ⁽¹⁾
(not including power stations)

	<i>(in 1 000 tonnes)</i>				
	1975 (actual)	1976 (estimates)	1977 (forecasts)	1976/1975 %	1977/1976 %
Belgium	1 150	1 000	1 055	- 3.0	+ 5.5
Denmark	547	515	510	- 5.8	- 1.0
Germany (FR)	3 572	3 250	3 400	- 9.0	+ 4.6
France	2 547	2 500	2 500	- 1.9	-
Ireland	60	60	60	-	-
Italy	725	775	790	+ 6.9	+ 1.9
Luxembourg	1	2	4	-	-
Netherlands	247	290	265	+ 17.4	- 8.6
United Kingdom	8 282	8 250	9 020	- 0.4	+ 9.3
Community	17 131	16 642	17 604	- 2.8	+ 5.8

⁽¹⁾ Coke-oven coke assigned a value of unity.

TABLE 10

Deliveries of solid fuels for domestic heating
(including issues to mineworkers)

(in million tonnes of coal equivalent)

	1975 (actual)	1976 (estimate)	1977 (forecasts)	1976/1975 %	1977/1976 %
<i>Belgium</i>	2.5	2.1	2.0	- 15.3	- 7.5
of which: coal	2.0	1.8	1.7	- 9.9	- 7.7
patent fuel	0.4	0.2	0.2	- 32.6	- 16.0
coke	0.1	0.1	0.1		- 40.0 ⁽¹⁾
<i>Denmark</i>	0.1	0.1	0.1		- 5.0
<i>Germany (FR)</i>	10.4	9.4	8.4	- 9.6	- 9.4
of which: coal	3.0	2.7	2.5	- 10.4	- 5.7
patent fuel	1.4	1.2	1.2	- 7.0	+ 1.5
coke	3.1	2.8	2.4	- 7.4	- 14.0
lignite and briquettes	2.9	2.7	2.3	- 8.9	- 13.3
<i>France</i>	6.7	6.3	5.8	- 6.9	- 7.1
of which: coal	3.4	3.4	3.2	- 2.0	- 6.5
patent fuel	2.8	2.4	2.2	- 13.3	- 7.8
coke	0.3	0.3	0.3	- 3.0	- 6.2
lignite and briquettes	0.2	0.2	0.2	- 11.2	- 10.5
<i>Ireland</i>	1.0	0.9	0.9		
of which: coal and coke	0.6	0.5	0.5		- 6.5 ⁽¹⁾
peat and briquettes	0.4	0.4	0.4		-
<i>Italy</i>	0.6	0.5	0.4	- 16.6	- 12.1
of which: coal and patent fuel	0.3	0.3	0.2	- 16.6	- 24.0
coke	0.3	0.2	0.2	- 4.2	-
<i>Luxembourg</i>	0.1	-	-	- 7.5	- 10.2
<i>Netherlands</i>	0.2	0.1	0.1	-17.5	- 23.3
<i>United Kingdom</i>	17.9	16.5	15.3	- 7.8	- 7.0
of which: coal	13.4	12.0	11.0	- 10.7	- 8.3
patent fuel	1.2	1.2	1.2	-	-
coke	3.3	3.3	3.1	-	- 4.5
<i>Community</i>	39.5	36.0	33.2	- 8.8	- 7.6
of which: Coal	22.9	20.7	19.1	- 9.5	- 7.7
patent fuel	5.8	5.1	4.9	- 12.5	- 4.0
coke	7.1	6.9	6.3	- 3.3	8.0
lignite and peat	3.6	3.3	2.9	- 8.2	- 11.5

⁽¹⁾ Variation 1977/75.

NB: Difference due to rounding off.

TABLE 11
Hard coal production by areas

(in 1 000 tonnes, t = t)

	1975 (actual)	1976 (provisional)	1977 (forecasts)
Campine	5 972	6 112	6 325
Sud	1 507	1 126	925
BELGIUM	7 479	7 238	7 250
Ruhr	81 760	79 021	77 400
Aachen	6 017	5 674	5 690
Niedersachsen	2 011	2 007	2 330
Saar	8 975	9 295	9 200
Kleinzechen	396	329	360
GERMANY (FR)	99 161	96 326	94 980
National series	(92 393)	(89 269)	(87 800)
Nord/Pas-de-Calais	7 715	7 318	6 530
Lorraine	10 021	9 970	10 000
Centre-Midi	4 678	4 563	4 270
FRANCE	22 414	21 851	20 800
IRELAND	48	50	50
Scotland	9 945	9 433	..
North East	14 940	13 402	..
Yorkshire	32 766	31 024	..
North West	12 390	11 564	..
Midlands	37 258	36 258	..
South Wales	8 752	8 001	..
Kent	730	.. (2)	..
Licensed mines	625	12 522	..
Opencast	10 413		
UNITED KINGDOM	127 819	122 204	125 000
COMMUNITY (1) t = t	256 923	247 669	248 080
National series	(250 153)	(240 612)	(240 900)

(1) Difference due to rounding off.

(2) Kent: included in the Midlands.

TABLE 12

Hard coal production*(in 1 000 tonnes of coal equivalent)*

	1975 (actual)	1976 (provisional)	1977 (forecasts)	Change in %	
				1976/1975	1977/1976
Belgium	6 788	6 530	6 580	- 3.8	+ 0.8
Germany (FR)	93 688	90 700	89 750	- 3.2	- 1.0
France	20 439	20 000	18 970	- 2.1	- 5.1
Ireland	48	50	50	+ 4.2	-
United Kingdom	116 005	110 300	113 500	- 4.9	+ 2.9
Community	236 970	227 580	228 850	- 4.0	+ 0.6

TABLE 13

Average number of miners working below ground*(in 1 000's)*

	1975 (actual)	1976 (provisional)	1977 (forecasts)	Difference 1976/1975		Difference 1977/1976	
				1 000 men	%	1 000 men	%
Belgium	18.7	17.7	16.6	- 1.0	- 5.4	- 1.1	- 6.2
Germany (FR)	109.8	105.8	102.5	- 4.0	- 3.6	- 3.3	- 3.1
France	40.5	38.0	35.5	- 2.5	- 6.2	- 2.5	- 6.6
Ireland	0.3	0.3	0.3	-	-	-	-
United Kingdom	172.7	169.8	166.5	- 2.9	- 1.7	- 3.3	- 2.0
Community	342.0	331.6	321.4	- 10.4	- 3.1	- 10.2	- 3.1

TABLE 14

Output per underground manshift

	kg per manshift			Change in %	
	1975 (actual)	1976 (estimates)	1977 (forecasts)	1976/1975	1977/1976
Belgium	2 426	2 524	2 665	+ 4.0	+ 5.6
Germany (FR)	4 062	4 151	4 230	+ 2.2	+ 1.9
France	2 761	2 785	3 100	+ 0.9	+ 11.3
United Kingdom	3 493	3 400	3 565	- 2.7	+ 4.9

TABLE 15

Production costs and revenue per tonne

(% variations according to data supplied in national currencies)

	Production costs		Revenue	
	1975/1974	1976/1975 (provisional)	1975/1974	1976/1975 (provisional)
Belgium	+ 28.2	+ 11.5	+ 44.1	- 0.1
Germany (FR)	+ 17.6	+ 6.8	+ 21.5	+ 9.4
France	+ 27.3	+ 9.5	+ 26.7	+ 6.6
United Kingdom	+ 30.2	+ 28.6	+ 47.9	+ 23.0

TABLE 16

State aids to the coal industry
(Direct and indirect aids)

(in u.a. per tonne produced)

	Direct aids ⁽¹⁾		Indirect aids		Total	
	1975	1976	1975	1976	1975	1976
Belgium	16.45	..	1.28	1.72	17.73	..
Germany (FR)	2.18	2.17	0.09	0.20	2.27	2.37
France	6.33	6.99	0.16	0.23	6.49	7.22
United Kingdom	0.11	0.28	—	—	0.11	0.28
Community	1.94	..	0.09	0.15	2.03	..

⁽¹⁾ Including aids in respect of coking coal.

TABLE 17

Investments in coal production and preparation

<i>(in millions EUA)</i>			
	1975 (actual)	1976 (estimates)	1977 (forecasts) ⁽¹⁾
Belgium	7.6	14.1	1.8
Germany (FR)	161.4	203.5	139.3
France	27.7	41.3	45.4
United Kingdom	340.9	337.4	308.4
Total	537.6	596.3	494.9

⁽¹⁾ Excluding investments not formally decided or engaged.

TABLE 18

Pit closures

	1976		1977	
	Number	1975 output (1 000 tonnes)	Number	1975 output (1 000 tonnes)
Belgium (South)	2	247	2	310
Germany (FR)				
– Ruhr	3	3 660	–	–
France				
– NPC	2	464	1	709
United Kingdom				
– Scottish	1	91		
– North East	1	201		
– South Wales	2	112
Total UK	4	404		
Community	11	4 775	3 ⁽¹⁾	1 019 ⁽¹⁾

⁽¹⁾ Total excluding United Kingdom.

TABLE 19
Listed pithead prices for Community coal at 15 January 1976, 1 April 1976 and 15 January 1977

Category	Type	Date	<i>(in national currency per tonne)</i>									
			Ruhr DM	Aachen DM	Saar DM	Belgium Bfrs	Nord FF	Lothringen FF	South Wales £	Scottish £	North Yorkshire £	
Anthracite	Nuts 3 20/30 mm 3/4 - 1/4"	15. 1. 1976	219.00	—	—	3 125	351.00	—	29.77	—	—	
		1. 4. 1976	219.00	—	—	3 125	381.00	—	34.20	—	—	
		15. 1. 1977	219.00	—	—	3 450	381.00	—	34.20	—	—	
Lean coal	Nuts 3 20/30 mm 3/4 - 1/4"	15. 1. 1976	211.00	205.00	—	2 970	—	—	25.39	—	—	
		1. 4. 1976	211.00	205.00	—	2 970	—	—	29.13	—	—	
		15. 1. 1977	211.00	205.00	—	3 350	—	—	29.13	—	—	
Semi-bituminous	Nuts 4 10/20 mm 0 - 3/4"	15. 1. 1976	167.00	181.00	—	2 390	—	—	18.80	—	—	
		1. 4. 1976	167.00	181.00	—	2 390	—	—	—	—	—	
		15. 1. 1977	167.00	181.00	—	—	—	—	—	—	—	
Long flame	Nuts 2 30/50 mm 1/4 - 3/8"	15. 1. 1976	155.50	—	176.00	2 450	—	216.00	19.39	22.54	19.49	
		1. 4. 1976	155.50	—	176.00	2 450	—	235.00	—	26.08	22.05	
		15. 1. 1977	155.50	—	176.00	2 450	—	235.00	—	26.08	22.05	
Long flame	Nuts 5 6/10 mm 0 - 1"	15. 1. 1976	157.50	—	173.00	2 450	—	192.00 ⁽²⁾	—	20.96	17.52	
		1. 4. 1976	157.50	—	173.00	2 450	—	209.00 ⁽³⁾	—	25.10	19.98	
		15. 1. 1977	157.50	—	173.00	2 450	—	209.00 ⁽³⁾	—	25.10	19.98	
Coking coal	Medium or high volatile ⁽⁴⁾	15. 1. 1976	165.50	167.50	180.00 ⁽⁴⁾	2 350	360.00	310.00 ⁽⁴⁾	27.17 ⁽⁴⁾	23.43 ⁽⁴⁾	21.26 ⁽⁴⁾	
		1. 4. 1976	165.50	167.50	180.00	2 350	320.00	338.00	33.27	27.07	25.10	
		15. 1. 1977	165.50	167.50	180.00	2 050	320.00	338.00	33.27	27.07	25.10	
Coke	Blast furnace > 1/2" > 40 mm	15. 1. 1976	258.00	257.00	286.00	3 700 ⁽¹⁾	530.00	461.00	48.87	47.88	47.39	
		1. 4. 1976	258.00	257.00	286.00	3 850	480.00	502.00	57.23	56.25	55.76	
		15. 1. 1977	258.00	257.00	286.00	3 850	480.00	502.00	57.23	56.25	55.76	

(1) Zeebrugge large graded coke.
(2) Power stations: 252.90 to 241.56.
(3) Power stations: 254.00 to 264.00.
(4) High volatile.

TABLE 20

Listed pithead prices for Community coal at 15 January 1976, 1 April 1976 and 15 January 1977

Category	Type	Date	Ruhr	Aachen	Saar	Belgium	Nord	Lothringen	South Wales	Scottish	North Yorkshire	(in \$ per tonne) (1) (2)			
												Lowest price	Highest price	Difference %	
Anthracite	Nuts 3 20/30 mm 3/4 - 1 1/4"	15.1.1976	83.52	—	—	79.05	78.37	—	60.23	—	—	—	60.23	83.52	39
		1.4.1976	86.73	—	—	80.34	81.47	—	64.96	—	—	—	—	86.73	34
		15.1.1977	93.58	—	—	96.55	77.36	—	58.36	—	—	—	—	96.55	65
Lean coal	Nuts 3 20/30 mm 3/4 - 1 1/4"	15.1.1976	80.47	78.18	—	75.13	—	—	51.37	—	—	—	51.37	80.47	57
		1.4.1976	83.56	81.19	—	76.35	—	—	55.33	—	—	—	55.33	83.56	51
		15.1.1977	90.16	87.60	—	93.75	—	—	49.71	—	—	—	49.71	93.75	89
Semi-bituminous	Nuts 4 10/20 mm 0 - 3/4"	15.1.1976	63.63	69.03	—	60.46	—	—	38.04	—	—	—	38.04	69.03	81
		1.4.1976	66.14	71.68	—	61.44	—	—	—	—	—	—	61.44	71.68	17
		15.1.1977	71.36	77.34	—	—	—	—	—	—	—	—	71.36	77.34	8
Long flame	Nuts 2 30/50 mm 1 1/4 - 3/8"	15.1.1976	59.31	—	67.12	61.98	—	48.23	39.23	45.61	39.43	—	39.23	67.12	71
		1.4.1976	61.58	—	69.70	62.99	—	50.25	41.88	49.54	41.88	—	41.88	69.70	66
		15.1.1977	66.44	—	75.20	68.57	—	47.72	—	44.50	37.62	—	—	75.20	100
Long flame	Nuts 5 6/10 mm 0 - 1"	15.1.1976	60.07	—	65.98	61.98	—	42.87(4)	—	42.41	35.45	—	35.45	65.98	86
		1.4.1976	62.38	—	68.52	62.99	—	44.69(5)	—	47.68	37.95	—	37.95	68.52	81
		15.1.1977	67.30	—	73.92	68.57	—	42.44(6)	—	42.83	34.09	—	34.09	73.92	117
Coking coal	Medium or high volatile	15.1.1976	63.12	63.88	68.65(3)	59.45	80.38	69.21(3)	54.97(3)	47.41(3)	43.02(3)	—	43.02	80.38	87
		1.4.1976	65.54	66.34	71.29	60.13	68.43	72.28	63.20	63.20	51.42	47.68	47.68	72.28	52
		15.1.1977	70.72	71.57	76.91	57.37	64.98	68.23	56.77	56.77	46.19	42.83	42.83	76.91	80
Coke	Blast furnace > 1/2" > 40 mm	15.1.1976	98.39	98.01	109.07	93.60	118.33	102.93	96.88	98.88	95.88	—	93.60	118.33	26
		1.4.1976	102.18	101.78	113.27	98.98	102.64	106.85	107.35	108.71	106.85	105.92	98.98	113.27	14
		15.1.1977	110.24	109.82	122.21	107.75	97.46	95.98	101.93	97.65	95.98	95.14	95.14	122.21	28

(1) Dollar exchange rate

DM	Index	Bfrs	Index	FF	Index	£	Index
2.1.1975	2622	39.53	100	4.479	100	0.49	100
1.4.1976	2.525	38.89	98	4.676	104	0.52	106
4.1.1977	2.34	35.73	90	4.924	110	0.58	118

(2) Prices are not adjusted for quality differences.

(3) High volatile.

(4) For power stations: 52.00 to 53.93 \$/tonne.

(5) For power stations: 54.31 to 56.45 \$/tonne.

(6) For power stations: 51.58 to 53.61 \$/tonne.

TABLE 21

Coke-oven-coke production capacity

(in millions tonnes)

	Belgium	Germany (FR)	France	Italy	Netherlands	United Kingdom	Community
<i>1975</i>							
Colliery coke ovens	—	26.9	7.6	—	—	4.7	39.2
Iron and steel industry coke ovens	7.9	8.9	6.9	8.4	2.4	10.3	44.8
Independent coke ovens	0.4	—	—	2.6	0.6	3.4 ⁽¹⁾	7.0
Total	8.3	35.8	14.5	11.0	3.0	18.4	91.0
of which coastal coking plants	1.5	0.5	4.0	11.0	3.0
<i>1976</i>							
Colliery coke ovens	—	26.9	7.5	—	—	4.8	39.2
Iron and steel industry coke ovens	7.7	9.6	6.7	9.0	2.5	11.1	46.6
Independent coke ovens	0.4	—	—	2.6	0.6	3.0 ⁽¹⁾	6.6
Total	8.1	36.5	14.2	11.6	3.1	18.9	92.4
of which coastal coking plants	1.5	0.5	4.0	11.6	3.1
<i>1977</i>							
Colliery coke ovens	—	25.8	7.0	—	—	4.8	37.6
Iron and steel industry coke ovens	7.8	9.6	6.7	9.0	2.5	12.2	47.8
Independent coke ovens	0.4	—	—	2.6	0.6	3.0 ⁽¹⁾	6.6
Total	8.2	35.4	13.7	11.6	3.1	20.0	92.0
of which coastal coking plants	1.5	0.5	4.0	11.6	3.1

⁽¹⁾ Including LTC.

TABLE 22

Coke-oven coke

(in 1 000 tonnes)

	Coal deliveries to coking plants	Consumption of coal in coking plants	Production of coke-oven coke	
			1 000 tonnes	Variation in % versus previous year
<i>1975 (actual)</i>				
Belgium	7 401	7 346	5 728	— 28.9
Germany (FR)	44 589	44 555	34 818	— 0.4
France	14 838	14 831	11 445	— 6.8
Italy	10 996	10 996	8 115	— 5.3
Netherlands	3 646	3 398	2 680	—
United Kingdom	21 673	21 629	15 859	+ 0.5
Community	103 143	102 755	78 645	— 4.4
<i>1976 (estimated)</i>				
Belgium	8 300	8 300	6 400	+ 11.7
Germany (FR)	41 100	41 050	32 050	— 8.0
France	14 900	14 700	11 275	— 1.5
Italy	10 515	10 500	8 050	— 0.8
Netherlands	3 520	3 430	2 700	—
United Kingdom	23 250	23 250	15 750	— 0.7
Community	101 585	101 230	76 225	— 3.1
<i>1977 (forecasts)</i>				
Belgium	8 325	8 250	6 350	— 0.8
Germany (FR)	39 400	39 200	30 600	— 4.5
France	14 500	14 300	11 000	— 2.4
Italy	11 150	11 050	8 500	+ 5.6
Netherlands	3 650	3 500	2 750	+ 1.8
United Kingdom	23 400	23 400	16 000	+ 1.6
Community	100 425	99 700	75 200	— 1.4

TABLE 23

Coal supplies to coke ovens

(in 1 000 tonnes)

	National coal	Coal from other ECSC countries	Total ECSC coal	Coal from third countries	Total supplies
<i>Belgium</i>					
1974	4 762	2 382	7 144	3 311	10 455
1975	4 052	1 837	5 889	1 704	7 593
1976	3 650	2 050	5 700	2 600	8 300
<i>Germany (FR)</i>					
1974	45 068	3	45 071	61	45 132
1975	44 327	229	44 556	33	44 589
1976	40 820	160	40 980	120	41 100
<i>France</i>					
1974	7 328	4 083	11 411	3 877	15 288
1975	6 806	3 720	10 526	4 410	14 936
1976	7 080	3 320	10 400	4 500	14 900
<i>Italy</i>					
1974	—	3 249	3 249	8 638	11 887
1975	—	2 800	2 800	8 333	11 133
1976	—	2 800	2 800	7 715	10 515
<i>Netherlands</i>					
1974	37	737	774	2 680	3 454
1975	—	893	893	2 777	3 670
1976	—	760	760	2 760	3 520
<i>United Kingdom</i>					
1974	20 409	49	20 458	831	21 289
1975	21 287	15	21 302	690	21 992
1976	21 955	45	22 000	1 250	23 250
<i>Community</i>					
1974	77 604	10 503	88 107	19 398	107 505
1975	76 472	9 494	85 966	17 947	103 913
1976	73 505	9 135	82 640	18 945	101 585

NB: 1976 (estimates).

TABLE 24

Trend of intra-Community trade in coal

(in 1 000 tonnes)

To \ From										
	Belgium	Denmark	Germany (FR)	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total receipts
<i>Belgium</i>										
1975	—	—	3 373	98	—	—	—	3	350	3 824
1976	—	—	3 450	90	—	—	—	—	200	3 740
1977	—	—	3 410	100	—	—	—	—	260	3 770
<i>Denmark</i>										
1975	—	—	1	—	—	—	—	—	11	12
1976	—	—	—	—	—	—	—	—	10	10
1977	—	—	10	—	—	—	—	—	100	110
<i>Germany (FR)</i>										
1975	266	—	—	317	—	—	—	212	401	1 196
1976	200	—	—	400	—	—	—	20	580	1 200
1977	200	—	—	340	—	—	—	—	560	1 100
<i>France</i>										
1975	174	—	5 511	—	—	—	—	9	795	6 489
1976	70	—	4 600	—	—	—	—	—	430	5 100
1977	80	—	4 560	—	—	—	—	—	270	4 910
<i>Ireland</i>										
1975	—	—	7	—	—	—	—	—	184	191
1976	—	—	—	—	—	—	—	—	200	200
1977	—	—	—	—	—	—	—	—	220	220
<i>Italy</i>										
1975	—	—	3 027	23	—	—	—	—	18	3 068
1976	—	—	2 950	30	—	—	—	—	20	3 000
1977	—	—	3 005	25	—	—	—	—	20	3 050
<i>Luxembourg</i>										
1975	32	—	403	20	—	—	—	—	22	477
1976	15	—	490	20	—	—	—	—	15	540
1977	—	—	590	5	—	—	—	—	—	595
<i>Netherlands</i>										
1975	28	—	1 055	3	—	—	—	—	116	1 202
1976	20	—	850	10	—	—	—	—	100	980
1977	20	—	875	5	—	—	—	—	300	1 200
<i>United Kingdom</i>										
1975	8	—	41	—	46	—	—	36	—	131
1976	5	—	245	—	25	—	—	—	—	275
1977	—	—	90	—	10	—	—	—	—	100
<i>Total deliveries</i>										
1975	508	—	13 418	461	46	—	—	260	1 897	16 590
1976	310	—	12 585	550	25	—	—	20	1 555	15 045
1977	300	—	12 540	475	10	—	—	—	1 730	15 055

NB: 1975 (actual),
1976 (estimates),
1977 (forecasts)

TABLE 25

Trend of intra-Community trade in coke

(in 1 000 tonnes)

From To	Belgium	Denmark	Germany (FR)	France	Ireland	Italy	Luxem- bourg	Netherlands	United Kingdom	Total receipts
<i>Belgium</i>										
1975	—	—	173	179	—	—	—	178	64	594
1976	—	—	250	100	—	—	—	140	65	555
1977	—	—	280	100	—	—	—	120	60	560
<i>Denmark</i>										
1975	—	—	22	62	—	—	—	2	19	105
1976	—	—	25	30	—	—	—	—	25	80
1977	—	—	10	30	—	—	—	—	40	80
<i>Germany (FR)</i>										
1975	48	6	—	129	14	25	—	75	205	502
1976	70	10	—	195	—	—	—	75	100	450
1977	60	10	—	155	—	—	—	75	100	400
<i>France</i>										
1975	89	—	2 267	—	—	41	—	338	35	2 770
1976	90	—	2 240	—	—	70	—	300	—	2 700
1977	70	—	2 335	—	—	70	—	325	—	2 800
<i>Ireland</i>										
1975	—	—	—	—	—	—	—	—	7	7
1976	—	—	—	—	—	—	—	—	10	10
1977	—	—	—	—	—	—	—	—	10	10
<i>Italy</i>										
1975	—	—	41	59	—	—	—	—	21	121
1976	—	—	45	—	—	—	—	—	—	45
1977	—	—	75	—	—	—	—	—	—	45
<i>Luxembourg</i>										
1975	84	—	2 231	15	—	—	—	2	—	2 332
1976	90	—	2 040	20	—	—	—	—	—	2 150
1977	90	—	2 090	30	—	—	—	—	—	2 210
<i>Netherlands</i>										
1975	15	—	346	10	—	—	—	—	47	418
1976	50	—	165	15	—	—	—	—	—	230
1977	10	—	210	20	—	—	—	—	—	240
<i>United Kingdom</i>										
1975	—	—	—	—	—	—	—	—	—	—
1976	—	—	—	—	—	—	—	—	—	—
1977	—	—	—	—	—	—	—	—	—	—
<i>Total deliveries</i>										
1975	236	6	5 080	454	14	66	—	595	398	6 849
1976	300	10	4 765	360	—	70	—	515	200	6 220
1977	230	10	5 000	335	—	70	—	520	210	6 375

NB: 1975 (actual).
1976 (estimates).
1977 (forecasts).

TABLE 26

Imports of coal from third countries*A. By country of destination*

(in million tonnes)

	1975 (actual)	1976 (provisional)	1977 (forecasts)
Belgium and Luxembourg	2.4	3.5	3.1
Denmark	4.1	3.6	4.4
Germany (FR)	5.8	5.0	5.2
France	10.9	13.5	16.6
Ireland	0.5	0.4	0.4
Italy	9.6	9.4	10.1
Netherlands	2.8	3.8	3.6
United Kingdom	5.0	3.0	2.3
Community	41.1	42.2	45.7

B. By country of origin

	1975 (actual)	1976 (provisional)	1977 (forecasts)
USA	13.8	14.2	13.1
Poland	14.6	15.1	17.6
USSR	3.7	3.8	3.4
Australia	5.8	4.6	4.3
South Africa	1.7	3.4	6.2
Others	1.5	1.1	1.1
Total	41.1	42.2	45.7

C. By sector of consumption

	1973	1974 (actual)	1975	1976 (provisional)
Coking coal	17.0	19.4	17.7	19.1
Steam coal	8.0	11.7	17.8	18.8
Others	4.9	6.9	5.6	4.3
Total	29.9	38.0	41.1	42.2

TABLE 27

Imports of coal from third countries - 1976

(in million tonnes)

	USA	Poland	USSR	Australia	South Africa	Others	Total ⁽¹⁾
Belgium	2.1	0.3	0.3	0.3	0.3	0.2	3.5
Denmark	—	3.0	0.4	—	—	0.1	3.6
Germany (FR)	2.0	2.0	0.3	0.1	0.5	0.1	5.0
France	3.2	5.4	1.5	1.1	2.2	0.1	13.5
Ireland	—	0.4	—	—	—	—	0.4
Italy	3.8	2.9	1.3	1.1	0.4	—	9.4
Netherlands	2.2	1.0	—	0.5	—	0.1	3.8
United Kingdom	0.9	0.1	—	1.5	—	0.5	3.0
Community	14.2	15.1	3.8	4.6	3.4	1.1	42.2

NB: Difference due to rounding off. Provisional figures.

TABLE 28

Community producers' stocks

(in 1 000 tonnes)

A. Stocks of coal at the end of:

	1975 (actual)	1976 (provisional)	1977 (forecasts)	Difference	
				1976/1975	1977/1976
Belgium	806	1 120	1 120	+ 314	—
Germany (FR)	9 290	11 645 ⁽¹⁾	13 355 ⁽¹⁾	+ 2 355	+ 1 710
France	5 494	4 416	3 241	- 1 078	- 1 175
Ireland	31	30	30	- 1	—
United Kingdom	10 617	10 658	12 633	+ 41	+ 1 975
Community ⁽⁴⁾	26 238	27 878 ⁽³⁾	30 388 ⁽³⁾	+ 1 631	+ 2 510

B. Stocks of coke-oven coke at the end of:

	1975 (actual)	1976 (provisional)	1977 (forecasts)	Difference	
				1976/1975	1977/1976
Belgium	115	90	90	- 25	—
Germany (FR)	8 217	12 779 ⁽²⁾	14 779 ⁽²⁾	+ 4 562	+ 2 000
France	1 131	1 497	1 692	+ 366	+ 195
Italy	1 073	900	825	- 173	- 75
Netherlands	22	35	65	+ 13	+ 30
United Kingdom	2 439	3 025	3 025	+ 586	—
Community ⁽⁴⁾	12 997	18 326	20 476	+ 5 329	+ 2 150

⁽¹⁾ Including 5 178 of 'Notgemeinschaft'⁽²⁾ Including 2 977 of 'Notgemeinschaft'⁽³⁾ Including nine in Italy.⁽⁴⁾ Differences due to rounding off.

C. Stocks of coal and coke-oven coke, value in terms of coal equivalent for coke at the end of:

	1975 (actual)	1976 (provisional)	1977 (forecasts)	Difference	
				1976/1975	1977/1976
Belgium	955	1 237	1 237	+ 282	—
Germany (FR)	19 972	28 258	32 568	+ 8 286	+ 4 310
France	6 964	6 362	5 440	- 602	- 922
Ireland	31	30	30	- 1	—
Italy	1 395	1 179	1 079	- 216	- 100
Netherlands	29	45	85	+ 16	+ 40
United Kingdom	13 788	14 591	16 566	+ 803	+ 1 975
Community	43 134	51 702	57 005	+ 8 568	+ 5 303

TABLE 29

Stocks of coal at power stations*(in 1 000 tonnes)*

At the end of:	1974 (actual)	1975 (actual)	1976 (estimates)		Difference	
			1 000 tonnes	days	1975/1974	1976/1975
Belgium	520	579	550	65	+ 59	- 29
Denmark	1 889	2 711	3 000	350	+ 822	+ 289
Germany (FR)	5 679	6 195	5 200	63	+ 516	- 995
France	3 036	3 728	4 000	120	+ 692	+ 272
Ireland	—	—	—	—	—	—
Italy	410	729	450	130	+ 319	- 279
Netherlands	276	215	250	73	- 61	+ 35
United Kingdom	13 629	17 951	19 290	90	+ 4 322	+ 1 339
Community	25 439	32 108	32 740	82	+ 6 669	+ 632

Balance of supply and demand: hard coal, 1977

(in 1 000 tonnes - national series)

	Belgium	Denmark	Germany (FR)	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Community
1. Production	7 250	—	87 800	20 800	50	—	—	—	125 000	240 900
2. Correction for recoveries	700	—	+ 6 300	+ 1 600	—	—	—	—	+ 1 600	+ 10 200
3. Imports from third countries	3 120	4 350	5 200	16 590	395	10 100	17	3 595	2 300	45 667
4. Receipts from other ECSC countries	3 770	110	1 100	4 910	220	3 050	595	1 200	100	(15 055)
5. Total availabilities	14 840	4 460	100 400	43 900	665	13 150	612	4 795	129 000	296 767
6. Inland demand:										
(a) power stations at mines	320	—	9 500	7 000	—	—	—	—	200	17 020
(b) public power stations	3 000	3 800	23 000	14 200	50	1 500	5	1 000	79 250	125 805
(c) coking plants	8 325	—	39 400	14 500	—	11 150	—	3 650	23 400	100 425
(d) iron and steel industry	200	—	1 400	1 800	—	30	600	—	375	4 405
(of which power stations)	(—)	(—)	(1 000)	(300)	(—)	(—)	(—)	(—)	(200)	(1 500)
(e) other industries	815	500	6 000	1 300	60	190	2	40	8 720	17 627
(of which power stations)	(—)	(—)	(4 000)	(—)	(—)	(—)	(—)	(—)	(1 000)	(5 000)
(f) domestic heating	1 600	40	1 000	3 000	500	150	5	100	9 000	15 395
(g) miscellaneous:										
(1) issues to workers	80	—	400	150	—	—	—	—	2 000	2 630
(2) patent fuel plants	145	—	1 400	2 200	—	50	—	—	1 250	5 045
(3) own consumption at mines	25	—	500	400	—	—	—	—	900	1 825
(4) gasworks	—	120	1 100	—	45	—	—	—	—	1 265
(5) railways	5	—	150	—	—	80	—	—	—	235
(6) others	—	—	1 100	—	—	—	—	—	—	1 100
Total	14 515	4 460	84 950	44 550	655	13 150	612	4 790	125 095	292 777
7. Exports to third countries	25	—	1 200	50	—	—	—	—	200	1 480
8. Deliveries to other ECSC countries	300	—	12 540	475	10	—	—	—	1 730	(15 055)
9. Total requirements	14 540	4 460	98 690	45 075	665	13 150	612	4 795	127 025	294 257
10. Producer's stocks (beginning)	1 120	—	11 645	4 416	30	9	—	—	10 658	27 878
11. Additions to/withdrawal	—	—	+ 1 710	— 1 175	—	—	—	—	+ 1 975	+ 2 510
12. Producer's stocks (end)	1 120	—	13 355	3 241	30	9	—	—	12 633	30 388

Hard coal - intra-Community exchanges, 1977

(in 1 000 tonnes)

From To	Belgium	Denmark	Germany (FR)	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total receipts
Belgium	—	—	3 410	100	—	—	—	—	260	3 770
Denmark	—	—	10	—	—	—	—	—	100	110
Germany (FR)	200	—	—	340	—	—	—	—	560	1 100
France	80	—	4 560	—	—	—	—	—	270	4 910
Ireland	—	—	—	—	—	—	—	—	220	220
Italy	—	—	3 005	25	—	—	—	—	20	3 050
Luxembourg	—	—	590	5	—	—	—	—	—	595
Netherlands	20	—	875	5	—	—	—	—	300	1 200
United Kingdom	—	—	90	—	10	—	—	—	—	100
Total deliveries	300	—	12 540	475	10	—	—	—	1 730	15 055

Balance of supply and demand: coke-oven coke, 1977

(in 1 000 tonnes)

	Belgium	Denmark	Germany (FR)	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Community
1. Production	6 350	—	30 600	11 000	—	8 500	--	2 750	16 000	75 200
2. Imports from third countries	40	10	800	—	—	25	30	—	—	905
3. Receipts from other ECSC countries	560	80	400	2 800	10	75	2 210	240	—	(6 375)
4. Total availabilities	6 950	90	31 800	13 800	10	8 600	2 240	2 990	16 000	76 105
5. Inland demand:										
(a) iron and steel industry	6 350	40	19 000	11 000	10	6 900	2 235	2 150	10 130	57 815
(b) other industries	240	10	1 400	1 200	—	600	2	225	1 300	4 977
(c) domestic users	45	30	1 100	150	—	250	3	5	3 150	4 733
(d) miscellaneous:										
- issues to workers	15	—	700	140	—	5	—	—	—	860
- own consumption	—	—	200	320	—	50	—	—	200	770
- others	—	—	200	10	—	—	—	—	70	280
Total	6 650	80	22 600	12 820	10	7 805	2 240	2 380	14 850	69 435
6. Exports to third countries	70	—	2 200	450	—	800	—	60	940	4 520
7. Deliveries to other ECSC countries	230	10	5 000	335	—	70	—	520	210	(6 375)
8. Total requirements	6 950	90	29 800	13 605	10	8 675	2 240	2 960	16 000	73 955
9. Producers' stocks (beginning)	90	—	12 779	1 497	—	900	—	35	3 025	18 326
10. Addition/withdrawal from producers' stock	—	—	+ 2 000	195	—	—	—	+ 30	—	+ 2 150
11. Producers' stocks (end)	90	—	14 779	1 692	—	825	—	65	3 025	20 476

Coke-oven coke - intra-Community exchanges, 1977

(in 1 000 tonnes)

From To	Belgium	Denmark	Germany (FR)	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total receipts
Belgium	—	—	280	100	—	—	—	120	60	560
Denmark	—	—	10	30	—	—	—	—	40	80
Germany (FR)	60	10	—	155	—	—	—	75	100	400
France	70	—	2 335	—	—	70	—	325	—	2 800
Ireland	—	—	—	—	—	—	—	—	10	10
Italy	—	—	75	—	—	—	—	—	—	75
Luxembourg	90	—	2 090	30	—	—	—	—	—	2 210
Netherlands	10	—	210	20	—	—	—	—	—	240
United Kingdom	—	—	—	—	—	—	—	—	—	—
Total deliveries	230	10	5 000	335	—	70	—	520	210	6 375

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