COMMISSION OF THE EUROPEAN COMMUNITIES

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Draft

REPORT FROM THE COMMISSION

The market for solid fuels in the Community in 1997 and the outlook for 1998

The market for solid fuels in the Community in 1997 and the outlook for 1998

1. This preliminary report analyses the forecasts for 1997 and 1998 prepared by the Member States and forwarded to the Commission in November 1997. Its purpose is to provide the ECSC Consultative Committee and the circles concerned with the most up-to-date information on the developments in the Community solid fuels market.

   A new report on the market for solid fuels in the Community in 1997 and the outlook for 1998 will be drawn up during the first quarter of 1998.

2. Economic activity in 1997 is expected to show a strong rebound from the estimated 1.8% growth in 1996, mainly thanks to sustained export growth and a pick-up in private consumption in some Member States. For 1997 on average, real GDP is projected to rise by 2.6 per cent in the Community as a whole. There are increasingly convincing signs that the acceleration in activity will continue in 1998, as favourable developments are already seen in the domestic economy because of continued budgetary consolidation, appropriate wage trends, sustainably low interest rates, returning consumer confidence and high profitability of investment. GDP should reach, on average, a rate of 3 per cent in 1998.

3. With respect to energy demand, provisional figures for the first half of 1997 point to a decrease, in terms of gross inland consumption, of some 1.2% for the Community as a whole, due to the warmer weather.

   By energy source, only nuclear and hydro have increased, by 2.4% and 1.4% respectively, compared to the same period of the previous year, whilst oil consumption has remained roughly static. All the other energy sources have seen consumption decline, the most significant being the 5.2% decline in solid fuels (5.1% decline for hard coal and 5.6% decline for lignite and peat) and the 3% decline in natural gas.

   For 1998, bearing in mind the anticipated performance of the economy and assuming constant weather conditions, energy demand forecasts suggest an increase of 1.8%. With respect to solid fuels, however, the demand for both hard coal and lignite could decrease by 4% and 2% respectively.

4. Community hard coal production still continues to be affected to varying degrees by restructuring, rationalisation and modernisation plans; hard coal production in the Community for 1997 is expected to have dropped by 3.6 Mt (-2.9%) to 123.1 Mt, compared to 1996. All coal producing Member States are expected to witness a decline in production, varying from France (-1.3 Mt, -18.2%), through Germany (-1.2 Mt, -2.2%) and the UK (-0.9 Mt, -1.8%) to Spain (-0.3 Mt, -1.4%).

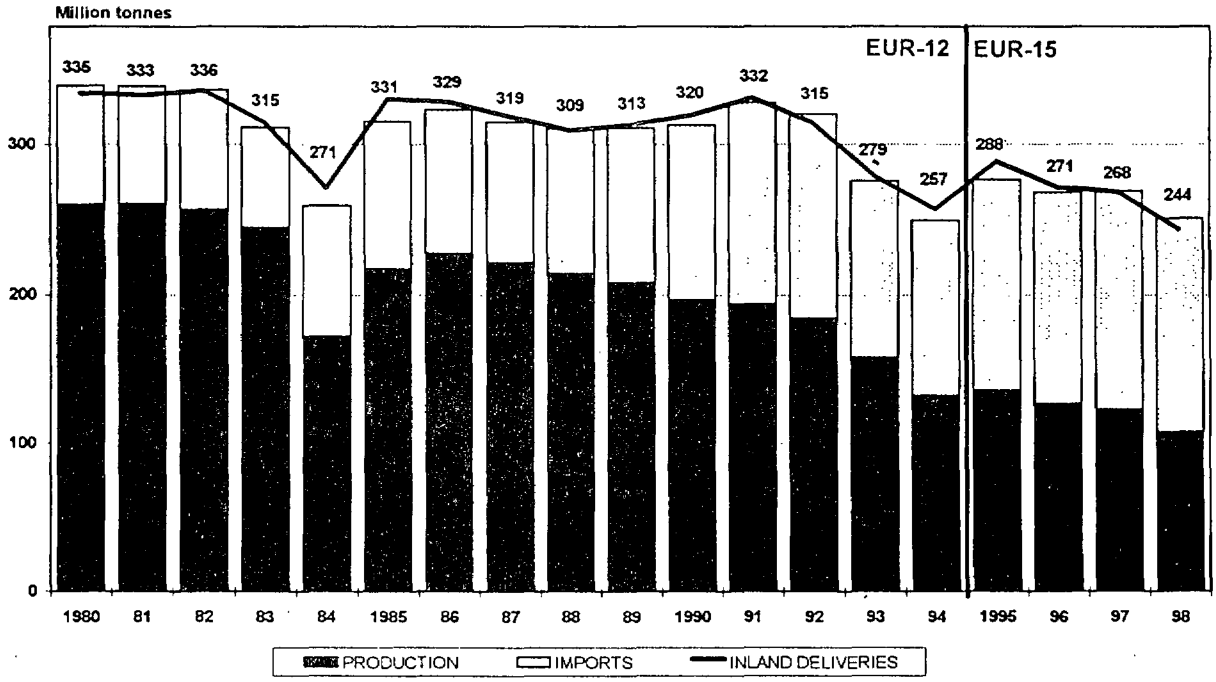
   For 1998, current forecasts show a drop of some 15.2 Mt (-12.3%) to 108 Mt. The United Kingdom is expected to account for the bulk of the decrease, nearly 12.2 Mt (-25.5%), as the producers respond to the contraction of their market in the electricity generating sector due to the penetration of gas. Germany expects to reduce hard coal production by just over 2 Mt (-3.9%), France by 0.6 Mt (-9.3%) and Spain by 0.4 Mt (-2.3%).

COMPARISON OF THE MAIN FEATURES OF THE SOLID FUEL MARKET (million tonnes)	1996 actual	1997 estimates	1998 forecast	1997/96 (%) **	1998/97 (%)**
HARD COAL					
Resources					
- Production	126.8	123.1	108.0	-2.9	-12.3
- Recoveries	3.0	2.5	2.2	-16.1	-11.9
- Imports from third countries	141.2	145.5	142.7	+3.0	-2.0
Total	**270.9**	**271.1**	**252.9**	**+0.1**	**-6.7**
Deliveries					
- To coking plants	54.2	53.3	51.4	-1.7	-3.5
- To power stations*	185.2	182.9	161.8	-1.3	-11.5
- To others	32.0	32.0	30.3	-0.1	-5.4
- Exports to third countries	0.3	0.5	0.5	+41.6	+9.4
Total	**271.8**	**268.7**	**244.0**	**-1.2**	**-9.2**
COKE					
Resources					
- Production	40.3	39.9	39.4	-0.9	-1.3
- Imports from third countries	6.5	7.4	7.2	+13.9	-2.1
Total	**46.8**	**47.3**	**46.6**	**+1.1**	**-1.4**
Deliveries					
- To steel industry	41.8	42.3	42.1	+1.2	-0.3
- Other deliveries within the Community	5.5	5.6	5.2	+2.1	-6.3
- Exports to third countries	0.4	0.3	0.4	-25.3	+22.6
Total	**47.6**	**48.2**	**47.7**	**+1.1**	**-0.9**
LIGNITE					
Resources					
- Production and imports	261.1	249.7	244.2	-4.4	-2.2
Deliveries					
- To briquetting plants	27.5	23.1	18.6	-16.0	-19.5
- To power stations	229.0	223.0	222.7	-2.6	-0.1
- Others (incl. exports to third countries)	4.0	3.2	2.8	-20.3	-13.5
Total	**260.6**	**249.4**	**244.1**	**-4.3**	**-2.1**
PEAT					
Resources					
- Production and imports	14.3	13.3	13.1	-7.1	-1.6
Deliveries					
- To briquetting plants	1.7	2.5	2.7	+53.5	+5.4
- To power stations	10.4	8.1	8.0	-21.5	-1.3
- Others (incl. exports to third countries)	2.3	2.5	2.4	+8.9	-4.1
Total	**14.3**	**13.1**	**13.1**	**-8.0**	**-0.5**

(!) The sums may not add up due to rounding.
* Including industrial and pithead power stations
** The variations are calculated in kt.

5. In 1997, internal hard coal deliveries in the Community could total 268.2 Mt, which is nearly 3.3 Mt down on the previous year. Reductions occurred in nearly all the consumer sectors, most particularly in deliveries to public power stations, which fell by 2.9 Mt (-1.7%) to 172.9 Mt, deliveries to coking plants (-0.9 Mt, -1.7%) and deliveries to other industries (-0.8 Mt, - 3.9%), although deliveries for autogeneration use could increase by nearly 0.4 Mt (+6.8%). Deliveries to the iron and steel industry also grew (+1.2 Mt, +14.7%). By Member State, the most significant decreases are expected in the United Kingdom (-3.0 Mt), Germany (-2.2 Mt) and France (-1.7 Mt), countered by small increases in Spain (+1.4 Mt), Finland (+0.8 Mt) and Italy (+0.6 Mt).

TREND IN PRODUCTION AND IMPORTS OF HARD COAL



* Including the new German Länder from 1991.

With respect to the stocks of hard coal, there is expected to be a slight increase in stocks at the producers in Germany, Spain and the United Kingdom, whilst coal stocks with the electricity producers could increase from some 50.5 Mt to 53.3 Mt, mainly as a result of the higher stocks being held by the UK generators.

For 1998, total internal hard coal deliveries are expected to drop by some 24.7 Mt to 243.5 Mt. The majority of this drop (21.1 Mt, or nearly 86% of the total decrease) will be from the reduction in deliveries to the power stations. Industrial use may drop by some 0.9 Mt, while deliveries to the domestic market are expected to reduce by 0.8 Mt, although there may be a very small increase in deliveries to the iron and steel industry, of just over 0.1 Mt. By country, the main reductions are foreseen in the United Kingdom (-15.5 Mt), France (-4.3 Mt), Denmark (-3.0 Mt) and, to a lesser extent in Portugal (-1.0 Mt) and Belgium (-0.5 Mt).

The electricity generating sector, as the main coal consumer, largely determines the trends in the deliveries of hard coal. However, it is important to note that the quantitative projections in coal use need to be treated with considerable caution, since the national analyses used to produce the figures tend to treat coal as the "residual fuel" required to supply projected total energy demand after determined amounts available from other fuels or energy sources have been supplied. Therefore, variations in the production of hydro, or in the performance of nuclear plants can introduce large changes in the projections for coal. Having said that, there is no doubt of the increasing penetration of natural gas to the detriment of solid fuels, especially in the United Kingdom.

6. With respect to the electricity generating industry, total electricity generation could decrease by around 1.5% during 1997 compared to 1996. Whilst gas, nuclear and hydro generated electricity can be expected to increase, this will be more than offset by the decrease in electricity generation from oil, coal and lignite.

   Hard coal deliveries to public power stations could fall by 2.9 Mt during 1997 compared to 1996, with the main decreases expected in the United Kingdom (-2.8 Mt), Germany (-2.1 Mt) and France (-2.0 Mt). These more than offset the smaller increases expected in Spain (+1.4 Mt), Finland (+0.9 Mt), Italy (+0.6 Mt), Denmark (+0.4 Mt) and Portugal (+0.4 Mt).

   Current 1998 forecasts indicate a potential drop of almost 20 Mt, of which over 14 Mt are accounted for by the United Kingdom alone, as a result of new non-coal fired plants being commissioned, and about 2.9 Mt, 2.1 Mt and 0.7 Mt in Denmark, France and Portugal respectively. In most other Member States there is a stability or slight decrease in deliveries.

7. Deliveries to industry as a whole may have decreased by 0.4 Mt (-1.4%) to 29.5 Mt during 1997, due to the significant increase in deliveries of hard coal to the iron and steel industry, which more than outweighed the decrease in deliveries to the other industries. The current forecasts for 1998, however, indicate an overall reduction of some 1 Mt to 28.5 Mt, despite the continued growth in deliveries to the iron and steel industry.

8. Crude steel production for 1997 is likely to reach some 158.0 Mt, which would represent an increase of about 7.3% (+10.8 Mt) compared to 1996. For 1998, crude steel production could increase by a further 5 Mt to reach 163 Mt.

   The final figure for coke production in 1997 may be 39.9 Mt, which would be 0.4 Mt (-0.9%) less than in 1996. However, imports from third countries could have increased by 0.9 Mt to 7.4 Mt. Deliveries to steelworks could be 42.3 Mt (+1.2%), whilst other deliveries of coke in the Community are expected to be some 5.6 Mt, which would be 2.1% up on the previous year.

   For 1998 a decline can be expected in production (down 0.5 Mt or -1.3%) and in deliveries both to the steel industry (down 0.1 Mt or -0.3%) and to other Community consumers (-6.3%).

9. Lignite and peat resources (production and imports) in the Community in 1997 are expected to be 12.4 Mt (-4.5%) lower than in the previous year, at around 262 Mt. The significant decline in lignite production in Germany appears to be continuing, with a reduction of 11.7 Mt to 175.6 Mt, due to the lower demand from the power plants (-6.6 Mt), the briquetting plants (-4.5 Mt) and "others" (-0.7 Mt). The principal producing area affected by the decline is Lausitz (-8.7 Mt) while in Helmstedt lignite production is forecast to increase slightly.

   For 1998, lignite and peat resources are expected to decrease again by 5.7 Mt (-2.2%), owing to the anticipated fall in demand in Germany, partly offset by planned increases for power generation in Greece (2.3 Mt, +3.9%).

10. In 1997, imports of hard coal from third countries are expected to have risen by 4.3 Mt (+3%) in comparison with the previous year. Total imports are estimated at 145.5 Mt, with the main increases expected in the United Kingdom (+4.7 Mt), Germany (+1.1 Mt) and Denmark (+1.1 Mt), partly offset by the decreases in Spain (-2.9 Mt), and France (-0.9 Mt). With respect to the suppliers, changes in imports are principally expected to benefit Colombia (+5.1 Mt) and, to a lesser extent, Australia (+1.3 Mt), whilst South Africa may see a reduction of 0.7 Mt in tonnages into the Community.

    In 1998, imports of hard coal from third countries could decrease by 2.8 Mt (-1.9%), compared to 1997, to reach 142.7 Mt. The important increase in imports foreseen into Spain (+2.6 Mt) and Germany (+1.8 Mt) are more than outweighed by the decreases anticipated in most other Member States, especially Denmark (-3 Mt), the United Kingdom (-1.5 Mt), Portugal (-1 Mt) and France (-0.5 Mt). By suppliers, changes are not expected to be significant except for the fall of imports from the United States and South Africa (-1.8 Mt and -1.3 Mt respectively).

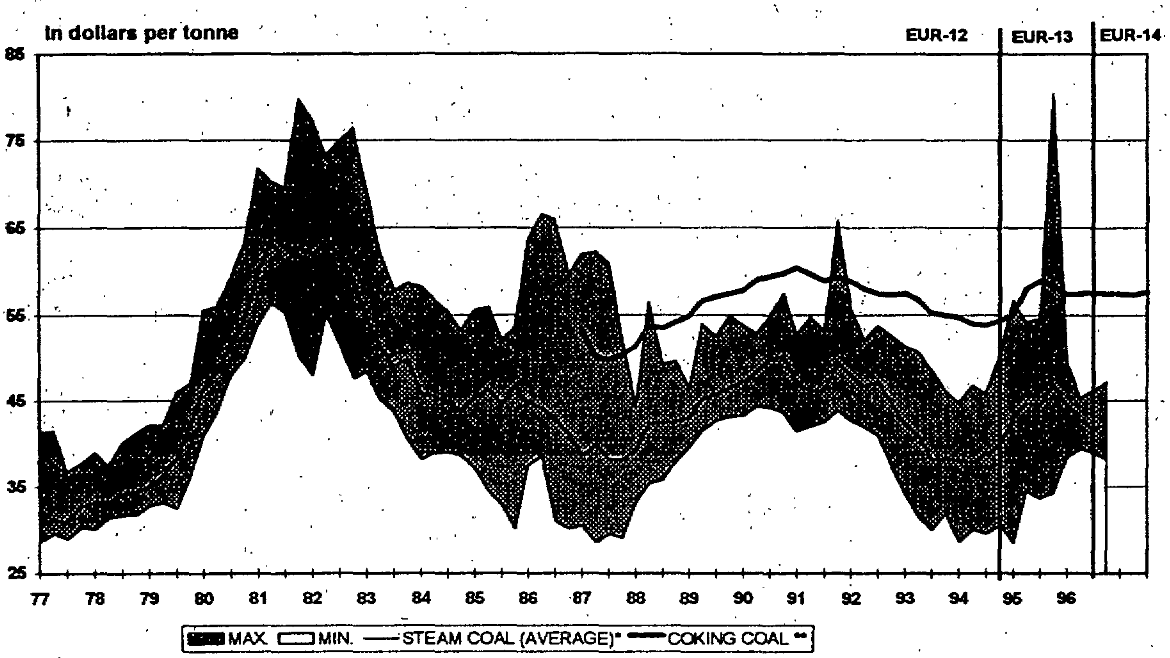
11. After a robust end to 1996, traded coal prices have been falling in 1997. Some buyers are waiting for a further reduction, but this is not universally expected. After the very low rates of last autumn, freight rates were higher during the early part of 1997 and, after their customary weakness in the summer, appear to have been stronger during the autumn. However, particularly in the Panamax market, some cheap deals have been available.

    Competitor fuels have, in general, maintained their price levels. The crude oil price has been sustained at the higher levels of recent years, and the HFO price has largely mirrored this. However, petcoke has been competing in the European market this year; prices have been lower than in 1996, when the US market was short of supplies.

    With respect to the prices for imported coal, the price for coking coal in the third quarter of 1997 is 57.54 USD per tonne of coal equivalent (tce) as against 57.44 USD per tce for the same quarter of the previous year.

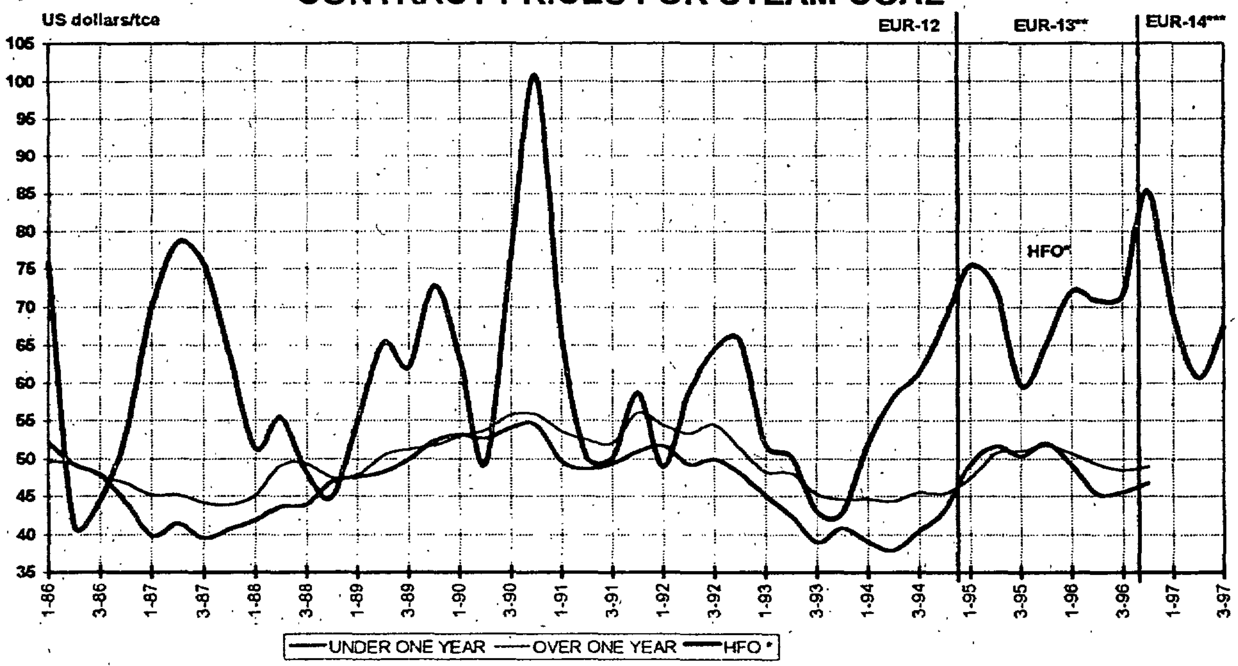
    The weighted average price of steam coal consumed in power stations by utilities (contracts above and below one year, and all origins) imported into the Community in the first quarter of 1997 (the latest information available at the time of writing) was 47.69 USD per tce compared with 50.31 USD per tce for the same period in the previous year.

AVERAGE CIF PRICES FOR HARD COAL IMPORTED FROM THIRD COUNTRIES



* Weighted average price (price range)
** Guide price (new reference)
EUR-13: EUR-12 plus Austria
EUR-14: EUR-15 minus Sweden

CIF PRICES FOR COAL IMPORTS CONTRACT PRICES FOR STEAM COAL



* Spot price Rotterdam; 3.5% sulphur
** EUR-12 plus Austria
*** EUR-15 minus Sweden

AVERAGE CIF PRICE FOR COAL IMPORTED FROM THIRD COUNTRIES ($/tce)		
PERIOD	COKING COAL*	STEAM COAL**
1/1995	54.84	47.97
2/1995	57.83	51.04
3/1995	58.73	50.91
4/1995	58.23	51.84
1/1996	57.24	50.31
2/1996	57.34	48.27
3/1996	57.44	47.77
4/1996	57.34	48.22
1/1997	57.28	47.69
2/1997	57.14	
3/1997	57.54	

* Referred to a standard coal quality of: ash 7.5%, moisture 8.0%, sulphur 0.8% and volatile matter 26%
** For electricity generation purposes.

12. Despite expansion in the Community's GDP during 1997 there is likely to be a slight reduction in total energy demand, with solid fuels being hit particularly hard. The first forecasts for solid fuels for 1998 would indicate a continuation of the downwards trend displayed since 1991.

ANNEXES

TABLE 1

HARD COAL BALANCE SHEET FOR 1998

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem-bourg	Nether-lands	Austria	Portugal	Finland	Sweden	United Kingdom	EUR-15
1. PRODUCTION (t = t)			49950	17100	5426		2								35500 *	107978
2. RECOVERIES	325		200		490		1								1200 *	2216
3. RECEIPTS FROM ECSC COUNTRIES	386		300	300	350		10		65	200	3 *					1614
4. IMPORTS FROM THIRD COUNTRIES	11507	10500	19300	10900	13720	1900	2897	16300 *	100	17000	3402 *	4841	6664	3125 *	20500 *	142656
5. AVAILABILITIES (1+2+3+4)	**12218**	**10500**	**69750**	**28300**	**19986**	**1900**	**2910**	**16300 ***	**165**	**17200**	**3405 ***	**4841**	**6664**	**3125 ***	**57200 ***	**252850**
6. TOTAL INLAND DELIVERIES	11153	10500	69160	28300	17476	1900	2910	16900 *	165	14250	3386 *	4841	6664	3125 *	52800 *	243530
A.- POWER STATIONS AT MINES			1200		2480											3680
B.- POWER STATIONS	4517	10100	45400	24000	2210	205	2300	8000 *		8800	1088 *	3915	4959	775 *	36200 *	152469
C.- COKING PLANTS	4639		13250	3300	5520			6950 *		4100	1966 *	491	1290	1640 *	8300 *	51446
D.- IRON AND STEEL INDUSTRY	900	100	2200		2900	130		1250 *	45	1000				300 *	900 *	9725
(of which POWER STATIONS)																
E.- OTHER INDUSTRIES	625	250	5600	650	3200	1560	200	650 *	120	325	330 *	435	415	410 *	4000 *	18770
(of which POWER STATIONS)			*3400*		*500*					*275*			*300*		*1200* *	5675
F.- DOMESTIC HEATING	450	50	1100	270	930		410	50 *							2440 *	5700
G.- MISCELLANEOUS (TOTAL 1 - 6)	22		410	80	236	5				25	2 *				960 *	1740
1. ISSUE TO WORKERS			*70*	*40*	*6*										*140* *	*256*
2. PATENT FUEL PLANTS	*22*		*300*		*210*										*805* *	*1337*
3. OWN CONSUMPTION AT MINES			*20*	*40*	*20*										*5* *	*85*
4. GASWORKS																
5. RAILWAYS						*1*					*2* *				*10* *	*13*
6. OTHERS			*20*			*4*				*25*						*49*
7. DELIVERIES TO ECSC COUNTRIES	**1064**		**400**		**91 ***					**2300**					**3100 ***	***6955***
8. EXPORTS TO THIRD COUNTRIES	**27**		**10**		**9 ***					**150**					**300 ***	***496***
9. TOTAL DELIVERIES (6+7+8)	**12244**	**10500**	**69570**	**28300**	**17576**	**1900**	**2910**	**16900 ***	**165**	**16700**	**3386 ***	**4841**	**6664**	**3125 ***	**56200 ***	**244026**
10. MOVEMENT OF PRODUCERS' AND IMPORTERS STOCKS (5-9)	-26		180		2410			-600 *		500	19 *				1000	3483

* Commission estimates

TABLE 2

HARD COAL BALANCE SHEET FOR 1997

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Austria	Portugal	Finland	Sweden	United Kingdom	EUR-15
1. PRODUCTION (t=t)			52000	17500	5981		2								47650 *	123133
2. RECOVERIES	361		200		500		3								1450 *	2514
3. RECEIPTS FROM ECSC COUNTRIES	386		500	250	320		11		99	200	3 *				100 *	1869
4. IMPORTS FROM THIRD COUNTRIES	11876	13500	17500	8840	14250	1800	3143	16300	100	16800	3402 *	5816	7035	3125	22000 *	145487
5. AVAILABILITIES (1+2+3+4)	**12623**	**13500**	**70200**	**26590**	**21051**	**1800**	**3159**	**16300**	**199**	**17000**	**3405 ***	**5816**	**7035**	**3125**	**71200 ***	**271134**
6. TOTAL INLAND DELIVERIES	11601	13500	69120	28378	21726	1800	3159	16900	199	14200	3386 *	5816	7035	3125	68270 *	268215
A.- POWER STATIONS AT MINES			1200		2835											4035
B.- POWER STATIONS	4609	13000	45400	23928	4280	200	2493	8000		8700	1088 *	4605	5443	775	50400 *	172921
C.- COKING PLANTS	4883		13130	3350	7125			6950		4100	1966 *	491	1166	1640	8500 *	53301
D.- IRON AND STEEL INDUSTRY	1000	100	2100		2880	130	1	1250	79	1000				300	750 *	9590
(of which POWER STATIONS)																
E.- OTHER INDUSTRIES	621	300	5700	700	3400	1465	209	650	120	365	330 *	720	426	410	4500 *	19916
(of which POWER STATIONS)			*3500*		*510*					*300*			*300*		*1350* *	5960
F.- DOMESTIC HEATING	468	100	1150	300	950		456	50		10					3050 *	6534
G.- MISCELLANEOUS (TOTAL 1 - 6)	20		440	100	256	5				25	2 *				1070 *	1918
1. ISSUE TO WORKERS			*75*	*50*	*6*										*160* *	*291*
2. PATENT FUEL PLANTS	*20*		*310*		*220*										*895* *	*1445*
3. OWN CONSUMPTION AT MINES			*25*	*50*	*30*										*5* *	*110*
4. GASWORKS																
5. RAILWAYS						*1*					*2* *				*10* *	*13*
6. OTHERS			*30*			*4*				*25*						*59*
7. DELIVERIES TO ECSC COUNTRIES	990		500		178 *					2200					1200 *	*5068*
8. EXPORTS TO THIRD COUNTRIES	16		20		17 *					200					200 *	*453*
9. TOTAL DELIVERIES (6+7+8)	**12607**	**13500**	**69640**	**28378**	**21921**	**1800**	**3159**	**16900**	**199**	**16600**	**3386 ***	**5816**	**7035**	**3125**	**69670 ***	**268668**
10. MOVEMENT OF PRODUCERS' AND IMPORTERS STOCKS (5-9)	16		560	-1788	-870			-600		400	19 *				1530 *	-733

* Commission estimates

TABLE 3

COKE BALANCE SHEET FOR 1998

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem-bourg	Nether-lands	Austria	Portugal	Finland	Sweden	United Kingdom	EUR-15
1. PRODUCTION (t=t)	3000		10700	2400	5300			5100 *		3000	1559 *	330	820	1150 *	6030 *	39389
2. RECEIPTS FROM ECSC COUNTRIES	34	15	400	30	350	2		30 *		100	51 *		202		140 *	1354
3. IMPORTS FROM THIRD COUNTRIES	561	10	3100	220	400	12	9	230 *		200	549 *	30	156	300 *	1440 *	7217
4. TOTAL AVAILABILITIES (1+2+3)	**3595**	**25**	**14200**	**2650**	**6050**	**14**	**9**	**5360 ***		**3300**	**2159 ***	**360**	**1178**	**1450 ***	**7610 ***	**46606**
5. TOTAL INLAND DELIVERIES	3105	25	14645	2530	7055	14	7	5370 *		2300	2000 *	330	1178	1450 *	7360 *	47369
A.- STEEL INDUSTRY	3000		12500	2530	6000			5120 *		2100	1440 *	250	1165	1385 *	6650 *	42140
B.- OTHER INDUSTRIES	92		1200		850	14		200 *		200	260 *	80	13	65 *	450 *	3424
C.- DOMESTIC SECTOR	3	25	300		85		7	50 *			273 *				230 *	973
D.- MISCELLANEOUS of which :	10		645		120						27 *				30 *	832
1. ISSUE TO WORKERS	-		*240*												*30* *	*270*
2. OWN CONSUMPTION			*5*													*5*
3. OTHERS	*10*		*400*		*120*						*27* *			-		*557*
6. DELIVERIES TO ECSC COUNTRIES	**488**		**100**	**100**	**320 ***			**50 ***		**1000**					**100 ***	**2158**
7. EXPORTS TO THIRD COUNTRIES	**30**		**10**	**20**	**70 ***			**60 ***				**30**			**150 ***	**370**
8. TOTAL DELIVERIES (5+6+7)	**3623**	**25**	**14755**	**2650**	**7445**	**14**	**7**	**5480 ***		**3300**	**2000 ***	**360**	**1178**	**1450 ***	**7610 ***	**47739**
9. STOCK MOVEMENT AT PRODUCTION & IMPORTS (4-8)	-28		-555		-1395		2	-120 *			159 *					-1937

* Commission estimates

TABLE 4

COKE BALANCE SHEET FOR 1997

(In thousands of metric tons)

	Belgium	Denmark	Germany	Spain	France	Greece	Ireland	Italy	Luxem-bourg	Nether-lands	Austria	Portugal	Finland	Sweden	United Kingdom	EUR-15
1. PRODUCTION (t=t)	3600		10600	2400	5260			5100		2900	1569 *	330	807	1150	6200 *	39906
2. RECEIPTS FROM ECSC COUNTRIES	22	17	400	25	350	2		30	208	100	51 *		202		135 *	1542
3. IMPORTS FROM THIRD COUNTRIES	575.	13	3200	245	300	12	8	230	6	200	549 *	30	156	300	1550 *	7374
4. TOTAL AVAILABILITIES (1+2+3)	4197	30	14200	2670	5910	14	8	5360	214	3200	2169 *	360	1165	1450	7885 *	47280
5. TOTAL INLAND DELIVERIES	3758	30	14955	2520	6060	14	8	5370	214	2300	2000 *	330	1165	1450	7685 *	47859
A.- STEEL INDUSTRY	3600		12700	2520	5000			5120	214	2100	1440 *	250	1152	1385	6800 *	42281
B.- OTHER INDUSTRIES	140	30	1250		850	14		200		200	260 *	80	13	65	600 *	3702
C.- DOMESTIC SECTOR	7		350		90		8	50			273 *				250 *	1028
D.- MISCELLANEOUS of which :	11		655		120						27 *				35 *	848
1. ISSUE TO WORKERS			*250*												*35* *	*285*
2. OWN CONSUMPTION			*5*													*5*
3. OTHERS	*11*		*400*		*120*						*27* *					*558*
6. DELIVERIES TO ECSC COUNTRIES	439		90	100	278 *			50		900					80 *	1937
7. EXPORTS TO THIRD COUNTRIES			10	20	62 *			60				30			120 *	302
8. TOTAL DELIVERIES (5+6+7)	4197	30	15055	2640	6400	14	8	5480	214	3200	2000 *	360	1165	1450	7885 *	48161
9. STOCK MOVEMENT AT PRODUCTION & IMPORTS (4-8)			-455	30	-490		0	-120			169					-875

* Commission estimates

TABLE 5

LIGNITE AND PEAT BALANCE SHEETS FOR 1998

LIGNITE (In thousands of metric tons)

	Belgium	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Austria	EUR-15
A. RAW PRODUCT											
- AVAILABILITIES :	226	169995	9400	1000	62200	9	210 *	10	50	1105 *	244205
PRODUCTION		168145	9400	1000	62200		200 *			1105 *	242050
IMPORTS	226	1850				9	10 *	10	50		2155
- UTILIZATION :	226	169995	9400	1020	62200	9	210 *	10	50	998 *	244118
BRIQUETTING PLANTS		18300			240				20	80 *	18640
POWER STATIONS		150500	9400	400	61280		210 *			898 *	222688
OTHERS	226	1195		620	680	9		10	30	20 *	2790
B. BRIQUETTES											
- AVAILABILITIES :	14	6820			110	3		5		172 *	6931
PRODUCTION		6470			110						6580
ARRIVAL FROM ECSC COUNTRIES	14					3		5		171 *	193
IMPORTS FROM THIRD COUNTRIES		350								1 *	351
- UTILIZATION	15	6820			110	3		5		151 *	6482
POWER STATIONS		200			75	3				10 *	288
INDUSTRY		2390								19 *	2409
DOMESTIC	13	3000						5		120 *	3138
DELIVERIES TO OTHER ECSC COUNTRIES	2	620									622
EXPORTS TO NON-MEMBER COUNTRIES		30									30
- OTHERS		580			35					2 *	617

PEAT (In thousands of metric tons)

	Ireland	Finland	Sweden	EUR-15
A. RAW PRODUCT				
- AVAILABILITIES :	4850	7400	800 *	13050
PRODUCTION	4850	7400	800 *	13050
IMPORTS				
- UTILIZATION :	4850	7400	800 *	13050
BRIQUETTING PLANTS	600	2068		2668
POWER STATIONS	3000	5032		8032
OTHERS	1250	300	800 *	2350
B. BRIQUETTES				
- AVAILABILITIES :	270	790		1060
PRODUCTION	270	790		1060
ARRIVAL FROM ECSC COUNTRIES				
IMPORTS FROM THIRD COUNTRIES				
- UTILIZATION	270	790		1060
POWER STATIONS		537		537
INDUSTRY		221		221
DOMESTIC	266			266
DELIVERIES TO OTHER ECSC COUNTRIES				
EXPORTS TO NON-MEMBER COUNTRIES				
- OTHERS	4	32		36

* Commission estimates

TABLE 6

LIGNITE AND PEAT BALANCE SHEETS FOR 1997

LIGNITE (In thousands of metric tons) — **PEAT** (In thousands of metric tons)

	LIGNITE											PEAT			
	Belgium	Germany	Spain	France	Greece	Ireland	Italy	Luxembourg	Netherlands	Austria	EUR-15	Ireland	Finland	Sweden	EUR-15
A. RAW PRODUCT															
AVAILABILITIES :	268	177407	9400	1140	60100	10	210	10	50	1105 *	249700	5062	7400	800	13262
PRODUCTION		175557	9400	1100	60100		200			1105 *	247462	5062	7400	800	13262
IMPORTS	268	1850		40		10	10	10	50		2238				
UTILIZATION :	268	177407	9400	1120	59900	10	210	10	50	998 *	249373	4917	7400	800	13117
BRIQUETTING PLANTS		22800			240				20	80 *	23140	460	2072		2532
POWER STATIONS		153000	9400	500	59000		210			898 *	223008	3102	5032		8134
OTHERS	268	1607		620	660	10		10	30	20 *	3225	1355	296	800	2451
B. BRIQUETTES															
AVAILABILITIES :	20	7390			110	3		5		172 *	7501	279	790		1069
PRODUCTION		7040			110						7150	279	790		1069
ARRIVAL FROM ECSC COUNTRIES	20					3		5		171 *	199				
IMPORTS FROM THIRD COUNTRIES		350				0				1 *	351				
UTILIZATION	20	7390			110	3		5		151 *	7054	279	790		1069
POWER STATIONS		200			75	3				10 *	288		537		537
INDUSTRY		2620								19 *	2639		221		221
DOMESTIC	15	3300						5		120 *	3440	275			275
DELIVERIES TO OTHER ECSC COUNTRIES	5	620									625				
EXPORTS TO NON-MEMBER COUNTRIES		30									30				
OTHERS		620			35					2 *	657	4	32		36

* Commission estimates

TABLE 7

HARD COAL PRODUCTION BY AREA

(In thousands of metric tons)

	1996	1997	1998
Ruhr	42844	42480	40730
Aachen	1071	200	
Ibbenburen	1633	1650	1700
Saar + Kleinzechen	7608	7670	7520
GERMANY	**53156**	**52000**	**49950**
Central Asturias	3158	3120	3100
Bierzo-Villablino + Narcea	6882	6740	6600
Norte Leon + Palencia	1954	1950	1950
Sur	1695	1690	1650
Aragon-Cataluña, Baleares	4064	4000	3800
SPAIN	**17753**	**17500**	**17100**
Lorraine	6165	5000	4600
Centre-Midi	1145	981	826
FRANCE	**7310**	**5981**	**5426**
IRELAND	**1**	**2**	**2**
Sulcis (Sardinia)			
ITALY			
Deep-mined	32223	31100 *	20750 *
Opencast	16315	16550 *	14750 *
UNITED KINGDOM	**48538**	**47650 ***	**35500 ***
EUR 15	**126758**	**123133**	**107978**

* Commission estimates

TABLE 8

LIGNITE PRODUCTION BY AREA

(In thousands of metric tons)

	1996	1997	1998
GKB	1105	1105 *	1105 *
WTK			
AUSTRIA	**1105**	**1105 ***	**1105 ***
Rheinland	102779	100975	100100
Helmstedt	3874	3925	4035
Hessen	181	162	150
Bayern	62	60	60
Lausitz	63574	54900	48300
Mitteldeutschland	16771	15535	15500
GERMANY	**187241**	**175557**	**168145**
Ptolemais	36479	38000	40100
Megalopolis	12607	12300	12300
Amindeo	7837	7800	7800
Others	2858	2000	2000
GREECE	**59781**	**60100**	**62200**
La Coruña	9604	9400	9400
SPAIN	**9604**	**9400**	**9400**
Centre-Midi	799	1100	1000
FRANCE	**799**	**1100**	**1000**
Valdarno	302	200	200 *
ITALY	**302**	**200**	**200 ***
EUR 15	**258832**	**247462**	**242050**

* Commission estimates

TABLE 9

PEAT PRODUCTION BY AREA

(In thousands of metric tons)

	1996	1997	1998
IRELAND	**5060**	**4457**	**5898**
North Finland			
East Finland			
West Finland			
South Finland			
FINLAND	**8400**	**7400**	**7400**
SWEDEN	**813**	**800**	**800 ***
EUR 15	**14273**	**12657**	**14098**

* Commission estimates

TABLE 10

COAL IMPORTS FROM THIRD COUNTRIES

(In thousands of metric tons)

1997	U.S.A	Canada	Australia	South Africa	Poland	CIS	China	Colombia	Others	Total Imports
Belgium	4500	237	2223	3797	325	300	204	175	115	11876
Denmark	300	300	1700	4050	3400	300		3050	400	13500
Germany	2500	100	1000	6500	3500	100		2500	1300	17500
Spain	3500	400	900	2500	120	40		100	1280	8840
France	3900	750	2800	2400	750	20	400	2300	930	14250
Greece	300			850		400		250		1800
Ireland	949 *			176 *				1638 *	380 *	3143
Italy	6960	1040	2120	3720	200	480	500	960	320	16300
Luxembourg				100						100
Netherlands	4500	350	800	2900	1100		100	4100	2950	16800
Austria					1565 *	146 *			1691 *	3402 *
Portugal	1613	165	256	1759				1785	238	5816
Finland	553	40		325	3977	1468		482	190	7035
Sweden	938		625		1094	313			155	3125
UK	8800 *	1600 *	3900 *	2750 *	550 *	100 *	60 *	3940 *	300 *	22000 *
EUR-15	39313	4982	16324	31827	16581	3667	1264	21280	10249	145487

(In thousands of metric tons)

1998	U.S.A	Canada	Australia	South Africa	Poland	CIS	China	Colombia	Others	Total Imports
Belgium	4455	249	2112	3607	309	270	194	184	127	11507
Denmark	250	250	1350	3150	2650	200		2350	300	10500
Germany	2900	200	1200	6800	3700	100		2800	1600	19300
Spain	3600	400	900	4100	50	50		600	1200	10900
France	3900	650	2600	2150	700	20	450	2150	1100	13720
Greece	300			950		400		250		1900
Ireland	875 *			162 *				1510 *	350 *	2897
Italy	6960 *	1040 *	2120 *	3720 *	200 *	480 *	500 *	960 *	320 *	16300 *
Luxembourg				100						100
Netherlands	4500	400	800	2900	1100		100	4100	3100	17000
Austria					1565 *	146 *			1691 *	3402 *
Portugal	996	165		1535				1200	945	4841
Finland	616	40		325	3741	1310		482	150	6664
Sweden	938 *		625 *		1094 *	313 *			155 *	3125 *
UK	7200 *	1500 *	4000 *	2500 *	200 *	50 *	100 *	4750 *	200 *	20500 *
EUR-15	37490	4894	15707	31999	15309	3339	1344	21336	11238	142656

* Commission estimates