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REPORT FROM THE COMMISSION

THE MARKET FOR SOLID FUELS IN THE COMMUNITY IN 1990

AND THE OUTLOOK FOR 1991

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THE MARKET FOR SOLID FUELS IN THE COMMUNITY IN 1990 AND THE OUTLOOK FOR 1991

I. INTRODUCTION

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

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

2. This report analyses the situation of the Community solid fuel market in 1990, makes forecasts for 1991 and gives corrected and updated data for 1989.

The data for 1989 and 1990 are available in January 1991. The forecasts for 1991 were made by the Member States at the end of 1990 and updated as far as possible at the time of writing.

II. SUMMARY

3. In 1990 economic growth in the Community amounted to 2.9%, a reasonably good rate but which represents a slight drop in relation to the two previous years. For 1991 the trend is expected to continue, with a growth rate of 2.2%.

4. Community gross domestic energy consumption rose 1.7% according to the latest figures available for 1990. Consumption of solid fuels and nuclear energy remained substantially the same, varying by only -0.3% and 0.2% respectively in relation to the previous year. Consumption of natural gas and petroleum products, on the other hand, rose 3.3% and 2.3% respectively. With regard to "other energy sources", hydroelectricity generation increased but mean annual water availability was still below the values reached in previous years; it should be borne in mind, however, that the contribution of the "other energy sources" group to the Community's energy needs is very modest (1-2% of total consumption).

   Energy consumption is forecast to grow about 1.2% in 1991, less than in recent years, as a result of the expected decline in economic growth over the coming year. This increase in demand is expected to be satisfied by natural gas and nuclear energy, with anticipated increases of 4.9% and 3.4%. Solid fuels will make the same contribution in absolute terms (+0.2%) while that of petroleum products will fall by -0.9%, partly due to their anticipated price increase.

5. Community hard coal production continues to decline steadily, as a result of the adjustment, restructuring and rationalization policies adopted by the Member States. In 1990 production attained 199.1 million tonnes as compared with 208.7 Mt in 1989 (-9.6 Mt or -4.6%) and forecasts for 1991 are 190.5 Mt.

   On the other hand, lignite and peat production continues to rise, reaching 192 Mt in 1990, and is forecast at around 198 Mt for 1991(*).

   Imports of hard coal from third countries exhibit a long-term trend contrary to Community hard coal, since in 1990 they rose to 112.6 Mt as compared with 102.9 Mt in 1989, representing 35.3% of the tonnage available in the Community.

(*) Former GDR not included

Community coke production continues to fall, partly as a result of cutbacks in the steel industry. 50.8 Mt was produced in 1990 as compared with 52.6 Mt in 1989 and the forecast for 1991 is 48.9 Mt.

6. Imported hard coal prices rose steadily throughout 1990. The average guide price of coking coal for the four quarters rose from USD 57.5 in 1989 to USD 59.8 in 1990, and prices are expected to continue to follow this rising trend.

7. Steam coal prices also rose throughout 1990; in the third quarter of 1990 it was USD 55.2 toe as compared with USD 50.95 in 1989; a similar trend is expected for 1991.

Nevertheless, these rises in the prices expressed in US dollars have been absorbed and even overtaken by the appreciation of Community national currencies in relation to the dollar. Prices of hard coal imported from third countries expressed in national currencies are thus lower than for the previous year for most Community countries.

	1989 Actual figures	1990 Estimates	1991 Forecasts	1991/90 Percentage
HARD COAL				
Resources				
- Production	208.7	199.1	190.5	-4.3
- Recoveries	5.2	7.0	5.4	-22.2
- Imports from third countries	102.9	112.6	111.8	-0.7
Total	316.8	318.7	307.7	-3.4
Deliveries				
- To coking plants	70.6	65.8	63.4	-3.7
- To power stations	200.4	203.5	203.8	+0.1
- To others	42.5	43.3	43.2	-0.2
- Exports to third countries	1.4	1.4	0.7	-48.2
Total	314.9	314.0	311.1	-0.9
COKE				
Resources				
- Production	52.6	50.8	48.8	-3.7
- Imports from third countries	1.6	1.3	1.3	-2.6
Total	54.4	52.0	50.1	-3.7
Deliveries				
- To steel industry	48.5	46.4	45.1	-2.7
- Other deliveries within Community	5.8	5.0	4.9	-2.0
- Exports to third countries	2.5	0.8	0.6	-23.8
Total	56.8	52.2	50.6	-3.0
LIGNITE AND PEAT				
Resources				
- Production and imports	193.5	192.0	197.6	+2.9
Deliveries				
- To briquetting plants	14.4	16.2	17.2	+6.2
- To power stations	169.6	169.7	173.8	+2.3
- Others (including exports to third countries)	5.4	5.4	5.5	+1.9
Total	189.4	191.3	196.5	+2.7

III. ECONOMIC OUTLOOK FOR THE COMMUNITY IN 1991

8. Community economic growth slowed down during 1990, especially in the latter half of the year. GDP grew in real terms by 2.9% in 1990. On the other hand, inflation was back up to 5.1% as compared with 4.9% in 1989 and fewer new jobs were created over the year, although the job creation rate attained 1.7% throughout 1990, this being the highest figure recorded in recent decades, and the unemployment rate fell to 8.5% for the Community as a whole.

This downturn in economic activity seems to result not only from rising oil prices but also other factors: the strengthening of monetary policies so as to contain inflation, the appreciation of European currencies and the slow-down of the world market have also played an important part here.

Gross fixed capital formation grew by 4.4% in real terms in 1990, which was a very significant drop in relation to the previous year (6.8%). Growth nevertheless exceeded that of GDP, which indicates strong underlying investment. A slow-down was recorded in capital equipment formation, which grew by only 5.1% in 1990 as compared with 8.9% in 1989.

The price of imported goods and services did not change substantially in 1990 (+1%). The effect of the rising price of petroleum products was compensated to a large extent by the fall in the dollar and the stable prices of non-petroleum products expressed in dollars.
The Community trade balance not including the former GDR was in surplus by 0.4% of GDP. If the former GDR is included, however, the trade balance was in deficit by approximately 0.2% of GDP.

In the international context economic growth is also slowing down. The United States economy, with growth at around 1%, is beginning to show signs of recession while in central and eastern Europe the reforms needed will lead to negative growth in the short term.

9. At the time of writing the development and possible end of the crisis in the Persian Gulf, its influence on oil prices, and the nature and extent of the United States economic recession, together with the economic uncertainties still present over German unification and the degree of cooperation which is established with other eastern countries, are among the main risk factors involved in making forecasts for the current year.

The outlook for 1991 is less hopeful, since economic growth is expected to slow in relation to 1990 results. Thus, the growth of Community GDP is estimated at around 2.2%, which suggests that job creation will fall to around 0.7%, a figure which is still respectable but insufficient to cover all the new arrivals on the labour market, so that unemployment is likely to rise slightly to 8.8%.

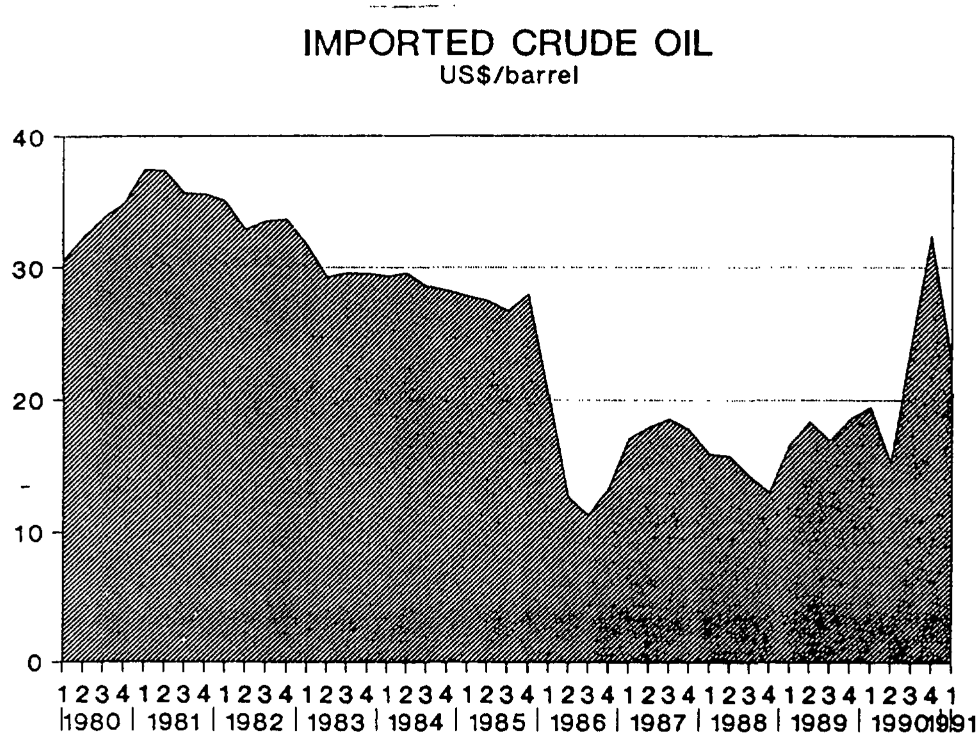
It is also to be expected that inflation will rise to around 5.3%. As for investment, gross fixed capital formation is forecast to grow by 2.9% in real terms, which is considerably lower than previous years but still indicates strong underlying investment. Prices of imported goods and services are expected to grow by 3.7%, a substantial increase.

IV. DEVELOPMENT OF COMMUNITY ENERGY MARKETS

10. On the basis of the short-term energy prospects which date back to December 1990, forecasting slower economic growth, but with GDP growth rates of 2.9% and 2.2% for 1990 and 1991 respectively, and an increase in real energy prices, total energy demand will probably have risen by 1.7% in 1990 and around 1.2% in 1991.

11. Demand for petroleum products grew considerably during 1990 (2.3%) in relation to the same periods the previous year, especially during the second and third quarters, although they were followed by a reduction in demand at the end of the year. In 1991 demand is expected to fall by 0.9% in favour of other energy products, especially natural gas.

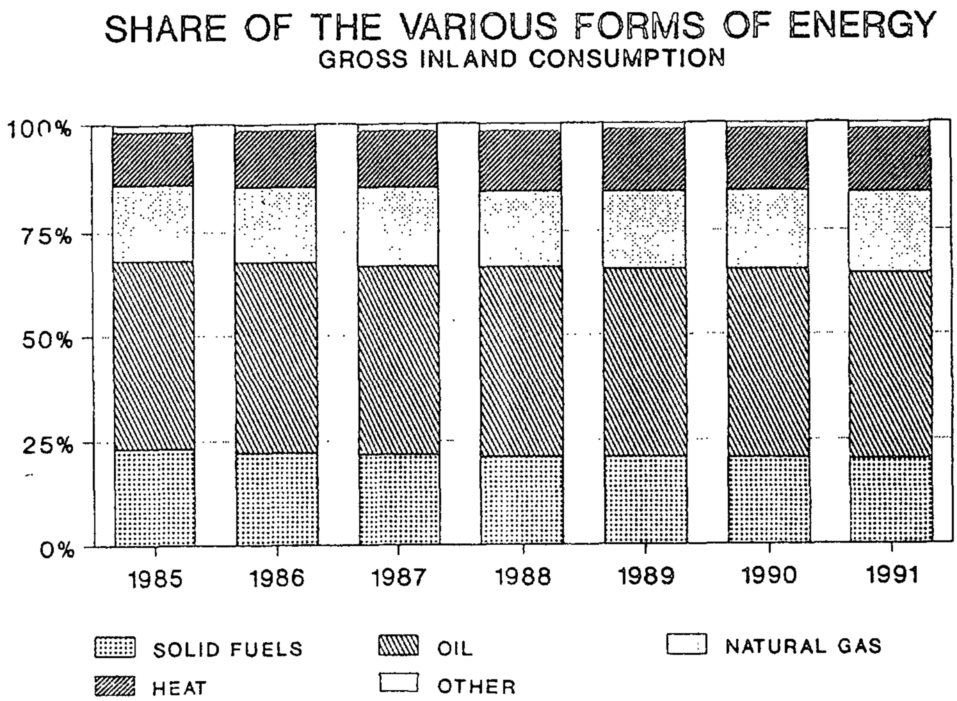
In the first half of the year crude oil prices exhibited a downward trend as a result of plentiful supply.



Despite this, during the rest of the year, owing to the Iraq/Kuwait conflict and the UN embargo on both countries, prices began to rise, at times even reaching unprecedented levels, more as a result of uncertainty and speculative manoeuvres than scarcity of crude oil, which has not been a problem.

When hostilities began the IEA presented a plan to bring onto the market part of the strategic reserves of the various member countries in order to stabilize the market.

12. Demand for natural gas also grew considerably (3.3%) despite the mild temperatures recorded. The sectors contributing most to the increase were firstly industry and secondly residential, commercial and electricity generation. For 1991 demand is expected to grow by 5%, this being the highest value of the various forms of energy in both relative and absolute terms.



It should be stressed that in 1990 the Commission presented a proposal, repealing Directive 75/404/EEC on the restriction of the use of natural gas in power stations. As a result, it is foreseeable that over the next few years there will be a tendency for the penetration of natural gas to increase to the detriment of other energy sources.

13. As in recent years, electricity demand was again affected by the good weather conditions recorded during the first half of 1990. It was 2% higher than in 1989 but less than forecast, and represented one of the lowest growth values in recent years. An increase of 3.3% is forecast for 1991.

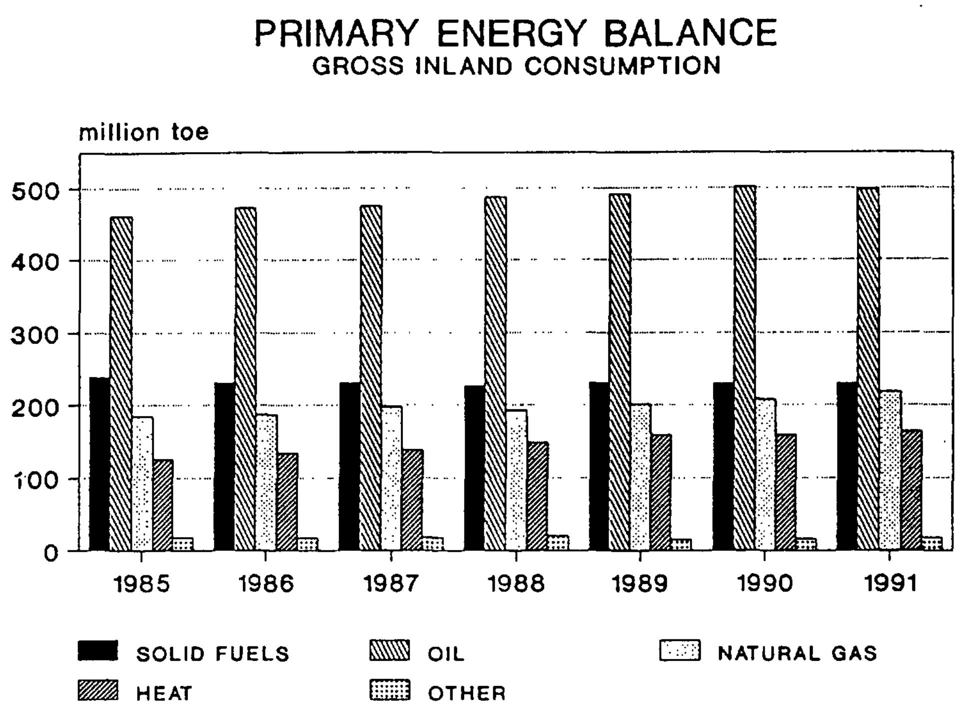
14. Demand for solid fuels was fairly steady, since consumption fell only 0.3% in 1990 in relation to the previous year, although there was a slight fall in hard coal consumption which was compensated by the increase in lignite consumption. A similar situation is forecast for 1991 with a small growth in demand for solid fuels of only 0.2%. The foreseeable increase in demand on the part of power stations will be offset by lower demand in the steel and other industries.

15. Community primary energy production was stable, although solid fuels again dropped (-4.5 Mtoe), petroleum products and nuclear energy hardly changed and, lastly, gas increased by 3.2 Mtoe, the remainder being attributable to hydroelectricity.

On the contrary, primary energy imports grew substantially (+26.1 Mtoe), in the form of solid fuels (+6.3 Mtoe), petroleum products (+15.7 Mtoe) and natural gas (+3.8 Mtoe). Growth in energy demand was clearly covered solely by sources outside the Community.

For 1991, Community primary energy production is forecast to rise by 1.5%. Solid fuels will fall by a further 1.7 Mtoe, particularly hard coal, as well as petroleum products (-1.1 Mtoe). On the other hand, production is expected to grow in natural gas (+4.0 Mtoe) and nuclear energy (+5.3 Mtoe), the latter as a result of new generating units coming into service.

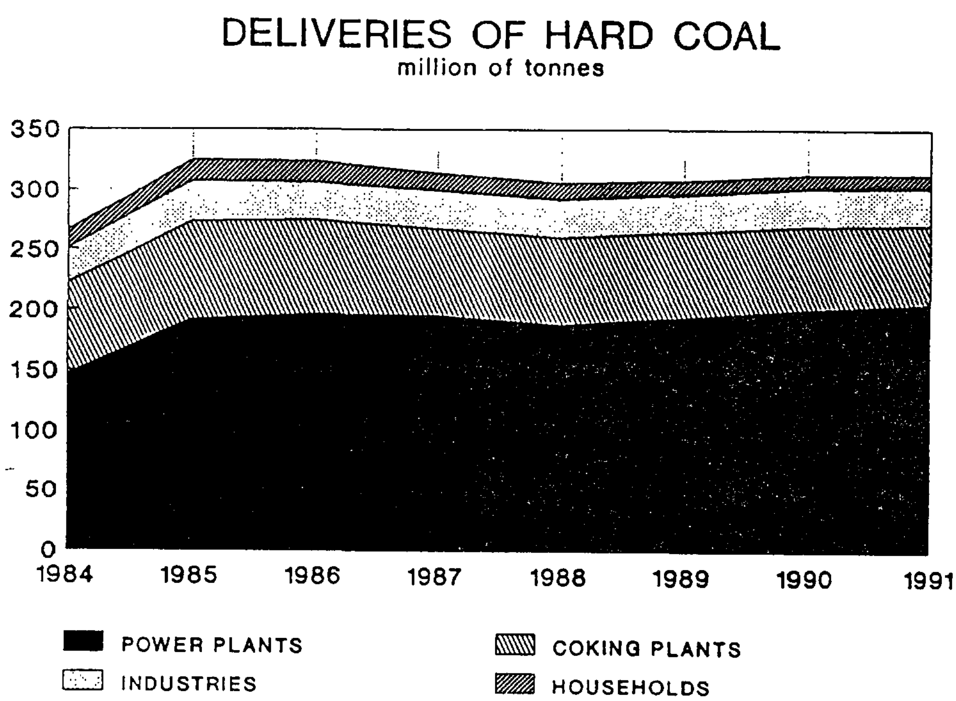
Primary energy imports are not expected to change significantly, but may fall slightly (-0.1 Mtoe). Once again, natural gas imports will rise (+3.6 Mtoe), while petroleum products will fall back (-3.7 Mtoe). Hard coal is not expected to change significantly, 1991 imports being estimated as similar to 1990.



V. DEMAND FOR SOLID FUELS

Deliveries of hard coal (Table 3)

16. Deliveries of hard coal in the Community hardly changed in 1990 in relation 1989; the figure was 312.6 Mt, a drop of only 0.9 Mt (-0.3%). It should be stressed that deliveries are still holding below the 1985/87 values. Nevertheless, the trend was not the same in all the consumer sectors and only in the case of deliveries to power stations and the steel industry did they increase by 3.1 Mt (+1.5%) and 1.9 Mt (+48.7%) respectively. In the other sectors, hard coal has continued to lose ground, confirming once again that demand for hard coal is increasingly tied to electricity generation. By way of example, while in 1984 deliveries to power stations accounted for 54% of the total, in 1990 they corresponded to almost 65%.



For 1991 the volume of hard coal deliveries to the whole Community is expected to fall somewhat (-2.3 Mt; -0.7%); but as in previous years, deliveries will suffer a certain decline except those corresponding to power stations, although in this case it is a fairly small (+0.3 Mt), to iron and steel industry (+0.4 Mt; +6.9%) and other industries (+0.2 Mt; +0.9%).

17. The reduction of deliveries to coking plants was 4.8 Mt (-6.8%), confirming the steady declining trend observed over the past five years. The reduction in deliveries originates not only in a reduced steel business but also in the use of coke stocks and the increasing use of steam coal for injection into blast furnaces, which currently saves some 4.7 Mt of coking coal.

Finally, there has also been a significant fall in deliveries to other industries (-1.7 Mt; -7.2%) and to the domestic sector.

18. Coke-making (tables 4 and 5)

Coke production was around 50.8 Mt, i.e. 1.8 Mt less than in 1989.

Deliveries to the steel industry were similarly affected, falling 2.1 Mt (-4.3%) to a total of 46.4 Mt. The drop is mostly attributable to a decline in steel business, since from early 1990 crude steel production in the Community was lower than 1989 levels, so that, for the year 1990 a fall of 2.2% was recorded in relation to the same period in the previous year. The main falls in steel business were recorded in Germany (-6.6%), the Netherlands (-4.7%), Luxembourg (-4.3%) and the United Kingdom (-4.7%); in the other countries there were no significant changes, except in Belgium where production rose by some 4.1%, which is partly a reflection on the poor results achieved the previous year. Another reason for the drop, though a limited one, is the increasingly widespread use of steam coal as a partial substitute for coke in blast furnaces, part of the flow of hard coal to the coking plants being diverted directly to the steelworks.

The remaining coke deliveries total barely 5 Mt, which is a sharp drop in relation to the previous year (-14.3%); exports also fell, to around 0.8 Mt in 1990 as against 2.5 Mt in 1989.

19. For 1991, all the indicators point to a further reduction in both production (-1.9 Mt; -3.7%) and deliveries in general (-1.4 Mt; -2.7%) which will total 50 Mt.

Steel production forecast for the current year is characterized by the present high degree of uncertainty brought about by the Gulf crisis, the exchange rate of the dollar and the liquidity problems in the Soviet Union and China which can discourage exports. Nevertheless, a drop in consumption of steel products (-3%) and hence of production (-3.3%) is expected, mainly owing to the anticipated slow-up in building, motor vehicles, transport in general, tubes and the use of part (about 1 Mt) of available stocks.

As a result of the above, deliveries of coke to the steel industry are expected to fall by 1.3 Mt (-2.7%) to around 45.1 Mt.

With respect to deliveries to other industries, domestic consumption, etc., no significant changes are expected, the situation being characterized by stability with a slight trend towards a decrease.

20. <u>Power stations</u> (Tables 6A and 6B)

Electricity demand in the Community continued to grow, albeit at a slower rate than in previous years (+2.0%), the lowest value recorded since 1983; for 1991 a return to the normal growth levels recorded in previous years is expected, around 3.25%.

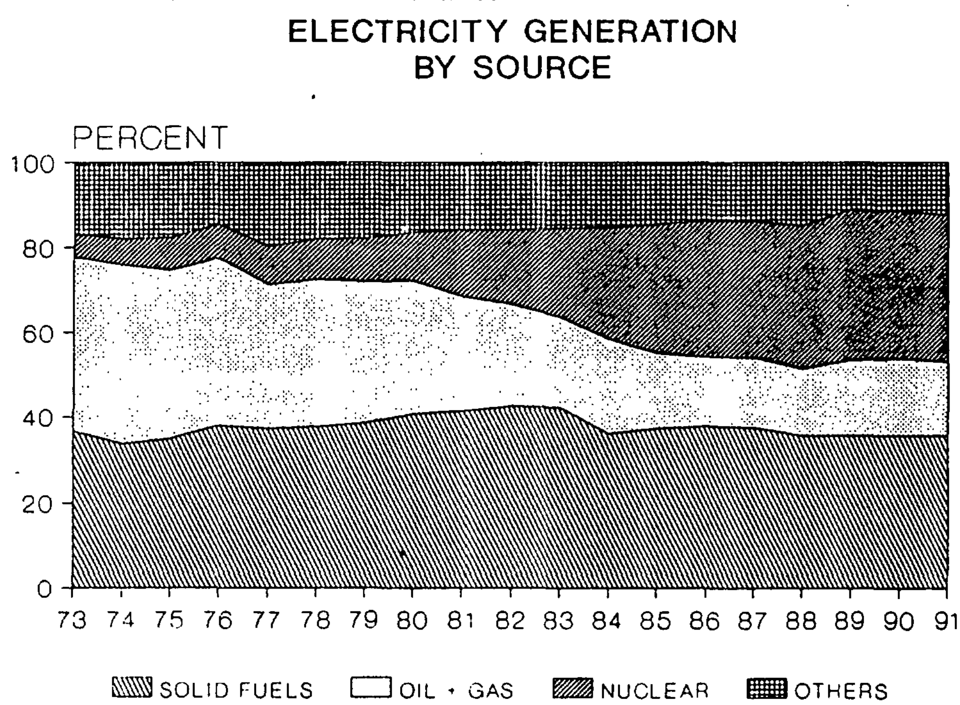
In 1990 nuclear power generation was maintained at the same levels as in the previous year, which meant that its contribution to coverage of Community energy needs fell slightly as a consequence of higher overall energy demand. Furthermore, for 1991 a slight increase in production is more than likely, so that its proportion of energy consumption will remain practically the same at around 14.4%.

Hydroelectricity recovered to a certain extent from the slump recorded in 1989 caused by the drought; production was nevertheless the second lowest of the eighties. This put a greater load on conventional power stations and increased consumption of all types of fossil fuels.

21. Regarding solid fuels in particular, according to initial estimates hard coal consumption rose 6.8 Mt (+3.5%) in 1990, and lignite 4.3 Mt (+2.5%).

Hard coal deliveries to public and industrial power stations were up 3.0 Mt (+1.5%) on the previous year. By country, the highest rises in absolute terms were recorded in Germany (+3.7 Mt), Portugal (+1.0 Mt), Belgium (+0.4 Mt), Spain (+0.4 Mt) and the United Kingdom (+0.3 Mt). On the contrary, the most significant falls corresponded to Denmark and France with -1.5 and -1.2 Mt respectively. Deliveries did not change significantly in other countries.

22. For 1991, volumes of deliveries are not expected to change for the Community as a whole (+0.3 Mt; +0.15%). Nevertheless, at national level, increases in deliveries are expected in Germany (+2.4%), Denmark (+2.3 Mt) and the United Kingdom (+1.0 Mt), with decreases in Spain (-2.4 Mt) and France (-2.1 Mt), mainly because water availability is expected to fall within historical average values, and below in Portugal, Belgium and Italy.



23. Other industries (Table 7)

"Other industries" covers many varied industries. Outstanding among them is the cement industry and, to a lesser extent ceramics, as the largest potential consumers of hard coal. The diversity of the sectors covered makes the analysis a very difficult task. Nevertheless a certain downturn has been observed throughout the Community in building in general and in housing in particular. The rise in domestic hard coal prices should also be considered, although hard coal from third countries is cheaper in terms of national currencies. Prices of other substitute fuels suffered short-term fluctuations.

For the whole Community hard coal deliveries fell by 2.4 Mt (-9.8%), the sharpest falls being in Germany (-2.4 Mt; -47.5%) and France (-0.6 Mt; -13.9%), and to a lesser extent the Netherlands (-0.16 Mt) although in relative terms this drop represents 44%. The loss of sales in Germany is particularly significant, since over the past five years it was -3.5 Mt (56.5%). On the other hand, the biggest rise was in the United Kingdom (+0.9 Mt; 14%), which thus reaped the rewards of the restructuring of its coal industry.

No significant changes are anticipated for 1991; deliveries are optimistically expected to rise 1.2% despite the anticipated fall in economic growth.

Deliveries of coke to other industries were 2.5 Mt, which is a drop of 0.7 Mt (-21.7%). This puts an end to the apparent stability of this market. A figure of 2.4 Mt is forecast for 1991.

24. Domestic use (Table 8)

The fall in consumption of solid fuels in this sector is undoubtedly one of the most pronounced. This market is declining steadily and is showing no signs of stability in the near future. The loss of sales is not due solely to the good weather conditions of recent years, but also partly in some cases to environmental regulations which tend to discourage the use of solid fuels, together with the aggressive policies adopted by firms or groups with interests in other types of fuel or energy with a view to increasing their market penetration.

Deliveries of hard coal for domestic consumption, including supplies to miners' families, fell to 9.3 Mt in 1990 from 12.4 Mt in 1989 and 17.6 Mt in 1986; they thus fell 47.2% in the period 1986-90.

In the case of deliveries of coke and lignite briquettes, the trend is worse since deliveries of the former dropped to 1.3 Mt in 1990 from 2.6 Mt in 1989 (-50.9%) and to 1.6 Mt from 3.9 Mt in the latter case (-57.4%).

Prospects for 1991 can be considered more promising since, although further falls in delivery volumes are expected, they are likely to be more moderate and contained, of the order of -2.9% for hard coal, -6.2% for coke and -12.8% for lignite and peat briquettes.

25. <u>Deliveries of lignite and peat</u>[1)] (Table 9)

Total deliveries of lignite and peat fared well during 1990, attaining 191.3 Mt, 1.8 Mt up on the previous year, owing as much to higher deliveries to power stations as to briquetting plant, a trend which will continue in 1991 with a further overall increase of 5.3 Mt.

Deliveries of lignite and peat to power stations hardly changed (+0,1Mt) attaining 169,7 Mt. The most important changes for individual countries were in Greece with an increase of 3.6 Mt (+7.2%) and Ireland with +0.5 Mt (+16.7%); on the way down were Germany with -2.2 Mt (-2.3%) and Spain with a fall of 1.8 Mt (-10.4%) owing to greater water availability. Changes in other countries did not exceed one million tonnes. It should be borne in mind that the use of lignite for electricity generation is concentrated mainly in three countries: Germany, Greece and Spain, which together account for 96% of the total. To this should be added the great potential in the former GDR; deliveries to power stations in 1990 totalled over 95 Mt.

1) Former GDR not included

Forecasts for 1991 are for an increase, with a further rise of 5.3 Mt (2.3%), due almost exclusively to Greece which plans to increase deliveries by some 4.5 Mt.

Finally, deliveries to German briquetting plants rose 1.7 Mt in 1990 and a further 1 Mt are forecast for 1991.

VI. COMMUNITY SOLID FUEL PRODUCTION

Hard coal (Table 10)

26. Community hard coal production in 1990 continued the trend of the previous years, namely production capacity dwindled slowly but surely as a consequence of the Member States' policies to restructure and improve competitiveness.

Production dropped 4.6% (-9.6 Mt) in 1990 in relation to the previous year to 199.1 Mt.

27. The greatest changes for individual countries were in the United Kingdom with -6 Mt (-6.1%), followed by Germany with -1.7 Mt (-2.2%), Belgium with -0.9 Mt (-45.9%), France with -0.7 Mt (-5.8%) and Spain with -0.2 Mt (-1.3%).

By the end of 1990 France had closed down all coal mining operations in the Nord-Pas-de-Calais area; capacity reductions are planned in the Lorraine coalfields and in the longer term the Centre-Midi underground workings are to be closed down.

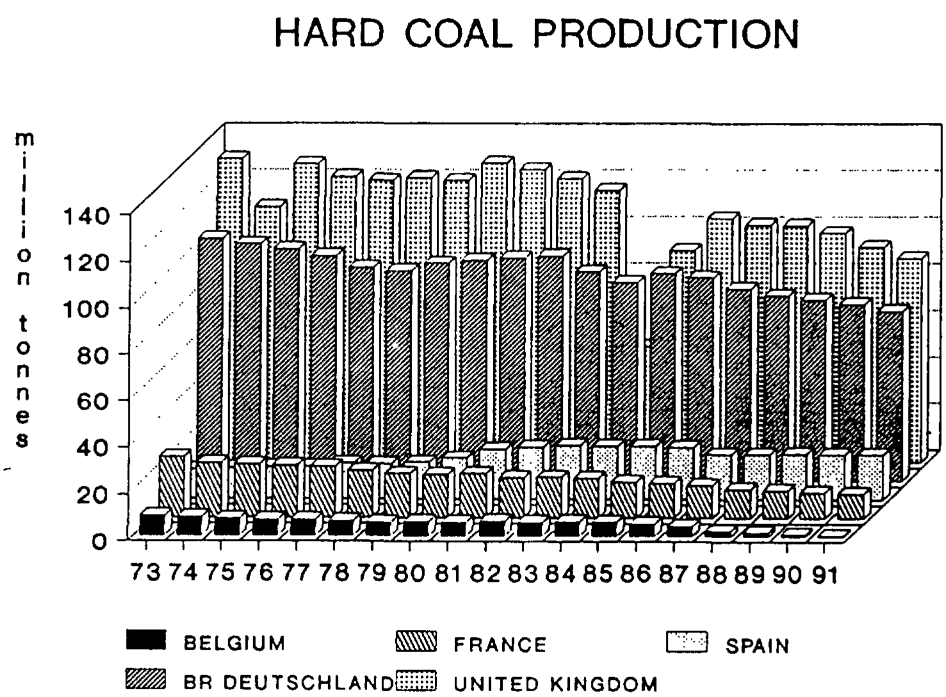
In the United Kingdom there were many further closures under the restructuring programme which began in 1985. Six collieries were closed in 1990: Blaenant, Shireoaks/Steetly, Brodsworth, Agecroft, Lea Hall and Donisthorpe/Rawdon; this left 69 working mines at the end of 1990.

In July 1990 the Spanish Government submitted to the Commission under the state aids authorization procedure a plan to restructure, rationalize and modernize the coal mining industry not under public control, which sets out the main lines to be followed until 1993. This will be supplemented by another similar plan, to be presented during the current year, affecting firms receiving direct Government grants.

Production cuts in Germany affected the Ruhr coalfields and to a lesser extent the Aachen area. Finally, the Camphausen colliery was closed in November 1990 and plans have been made to bring forward the closure of the Minister Achenbach pit.

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

28. For 1991 similar developments are expected, with a drop in production of 8.6 Mt, namely -4.3% in relation to 1990, spread over all the countries, although concentrated in the United Kingdom and Germany, with reductions of 4.8 Mt (-5.2%) and 2.9 Mt (-3.8%) respectively. Cuts are also planned in France (-0.5 Mt; -4.6%) and Belgium, (-0.5 Mt; -46.3%); Spain, on the contrary, plans to maintain production levels.



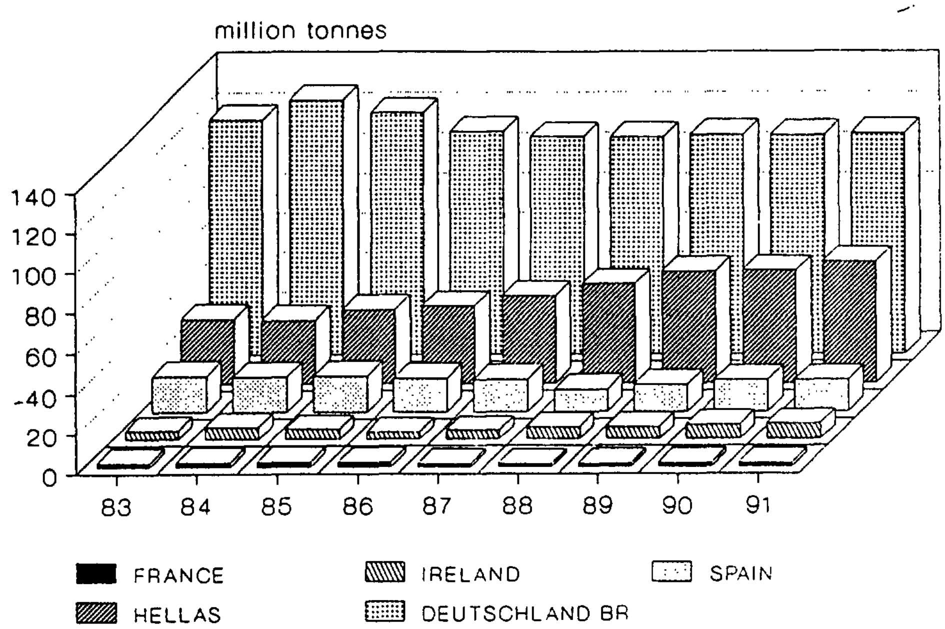
29. <u>Lignite and peat</u> (Tables 9, 26 and 27)

Lignite production in 1990 is forecast at some 192 Mt, slightly less than the previous year (-0.4 Mt). The greatest drop was recorded in Spain (-3.3 Mt) due to greater water availability. In the other producing countries production was maintained at the same levels as the previous year, except for Greece where it rose by some 3 Mt.

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

German unification has led to the incorporation of the high production of the former GDR (243.7 Mt) which is greater than the whole Community put together. A little over 40% of this capacity is supplied to power stations. This production capacity is to be cut back sharply in the coming years. One reason given for this is the environmental impact of burning lignite.

DELIVERIES OF LIGNITE AND PEAT



For 1991, production is expected to increase by 5.6 Mt (+2.9%), mainly as a result of expansion in Greece (+4.5 Mt) intended entirely for power stations. The other countries do not plan significant changes in relation to the 1990 results.

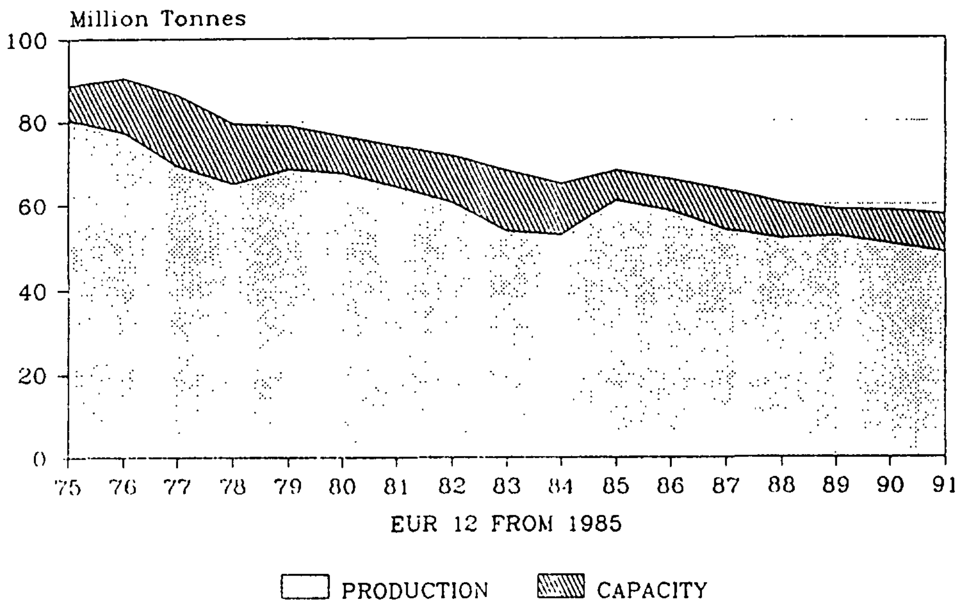
30. <u>Coke</u> (Tables 11A and 11B)

Total Community coke production capacity in 1990 (58.7 Mt) hardly changed in relation to 1989 (58.8 Mt). Taking countries individually, there was a fall in Germany of 0.3 Mt which was compensated at Community level by the increase in capacity recorded in the United Kingdom (0.2 Mt). It remained stable in the other countries. For 1991, a reduction in capacity of 1.2 Mt is planned in Italy as a consequence of plant closures and 0.1 Mt in Belgium, while an increase of 0.2 Mt is expected in the United Kingdom. This will put Community production capacity at 57.6 Mt.

Actual coke production was 86.5% of nominal capacity. Italy is still the country whose production capacity is least saturated, at 64%; for other countries the figure lies between 88 and 97%, so that the Community average, excluding Italy, is 91%, which is within the reasonable operating range.

Production was 50.8 Mt (-3.4%) in 1990 and 48.9 Mt (-3.7%) is estimated for 1991.

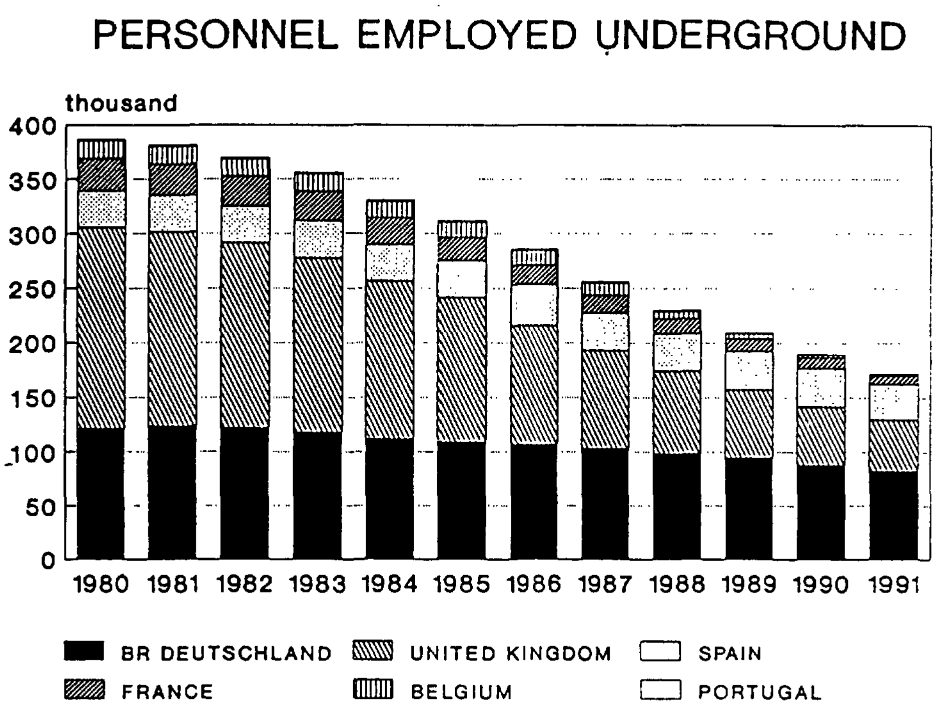
COKE PRODUCTION AND CAPACITY



31. Labour and productivity (Tables 12A and 12B)

The annual average underground workforce again fell by almost 20 000 (-9.4%) in 1990, as compared with 23 000 jobs lost in 1989, to 189 800. The United Kingdom accounted for almost half the losses (47.2%), followed by Germany (32%) and Belgium (12.2%); no significant changes were recorded in the other producing countries.

Forecasts for 1991 are similar, with an expected loss of nearly 18 000 jobs, mostly in the United Kingdom. The closure of the last colliery in Belgium and the implementation of restructuring measures in Spain will cause higher job losses.



Productivity is still tending to rise, a logical consequence of the restructuring measures adopted by all Member States which are concomitant on the closure of the least profitable and generally least efficient pits. On the other hand, in the process of closing a mine it is the non-production workers who are first to leave, which is also why very pronounced productivity rises can be observed in the stages leading up to the final closure of mining operations.

Productivity for underground workings, for the whole Community, rose from 599 kilograms per underground worker per hour in 1989 to 622 in 1990.

The clearest rises took place in the United Kingdom and France, if Belgium is excluded on account of its particular situation. Productivity rose 52.1% over the past ten years; the highest gain was in the United Kingdom which improved 86.4% over the same period.

32. State aids

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

FINANCIAL AID TO THE COAL INDUSTRY

	Total aid (million ECU)			Aid per tonne (ECU/t)		
	1988	1989	1990	1988	1989	1990
Belgium	202.6	159.4	79.2	81.46	85.93	77.27
Germany	4505.3	4417.0	4250.3	56.80	57.03	56.15
France	249.8	174.6	166.5	20.57	15.18	14.87
Spain	449.5	508.7	499.9	23.66	26.52	26.20
Portugal		1.7	4.6		7.17	20.44
United Kingdom		315.2	6627.5		3.11	67.97
Total	5724.1	11891.8	4995.9	26.68	56.97	25.09

Some financial interventions notified to the Commission (Portugal and Germany) are still awaiting a Commission decision. It should also be explained that the aids from the United Kingdom for 1989-90 include

ECU 3910 million in financial interventions reflecting the lower value of British Coal's capital assets which are intended to adapt the company's assets to their real value as a consequence of the numerous pit closures and in view of the perspectives of the coal market in United Kingdom. The UK government has notified the Commission that it will not grant the Corporation any other type of aid in the coming financial years for as long as Decision No. 2064/86/ECSC is applicable, apart from the aid to permit the Corporation to meet the cost of redundancies and other social costs of restructuring, rationalization and modernization of the coal industry.

33. Investment trends (Table 13)

The 1990 figures are still incomplete, but the available data indicate a further drop in investment in relation to previous years. For the whole Community investments are expected to attain ECU 947 million in 1990, not including Spain for which there are no data; this represents a reduction of 10.5% in relation to the previous year. For 1991 a further decrease is forecast to ECU 726.1 million (excluding Spain).

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

VII. SOLID FUEL PRICES

34. Exchange rate (Table 14)

Throughout 1990 the US dollar has been steadily losing value against the ECU and against all Community currencies without exception. 1990 began with an exchange rate of 0.8354 and it reached its lowest value of 0.7168 in November. The annual mean was 0.78762.

35. Trend of imported coal prices

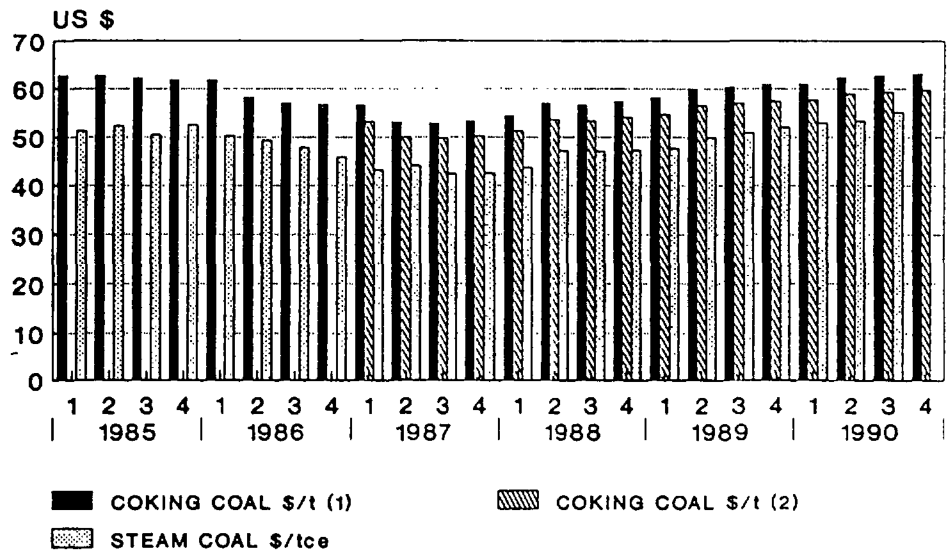
(a) Coke (Tables 15A and 15B)

The guide CIF price for the major Community ports calculated by the Commission for coking coal imported from the United States, Australia, Poland and Canada under medium- and long-term contracts continued to rise as in the previous year. In the fourth quarter of 1990 it rose to USD 59.8 as compared with USD 57.5 on the same date in 1989, which is equivalent to a rise of USD 2.3 (+4%), despite the fall of around USD 1 in freight and shipping costs over the year; freight charges nevertheless fell steadily throughout the first half of the year, with reductions of the order of USD 3 for hard coal from the United States and Australia; this trend was reversed as prices rose again in the latter months of the year.

For the current year everything seems to indicate that supply contracts already signed or shortly to be signed will tend to rise again. Table 15B shows the trend of guide prices expressed in national currencies.

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

GUIDE CIF PRICE
COKING AND STEAM COAL



(1) OLD REFERENCE GRADE
(2) NEW REFERENCE GRADE

36. <u>(b) steam coal</u> (Tables 15A and 15C)

In the third quarter the price CIF at the major European ports for steam coal imported from non-Community countries was USD 55.2 per toe, as compared with USD 50.95 at the same time the previous year, an increase of 8.3%. The sharpest price rise was recorded in the second half of the year, influenced to a certain extent by the steep rise in prices of petroleum products. Once again, however, it is clear that the oil market is not a target for the fixing of hard coal prices although it does have a certain influence, albeit very limited and very long term.

Steam coal prices rose 29.9% since the same period in 1987, when the lowest value of the eighties was reached at current prices. This rise was offset to a large extent, however, by the substantial depreciation of the dollar in relation to European currencies.

Table 15C shows the trend of steam coal prices expressed in national currencies. The depreciation of the US dollar has allowed prices to fall across the board.

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

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

The table compares the ECU prices which small consumers paid for household coal (mainly anthracite) on the 1st of July 1990 with those of the previous year. In the United Kingdom, Italy and Germany these prices have decreased. Spain should be added to this group since the prices expressed in the national currency have decreased, but because of the appreciation of the Peseta, prices have risen if they are expressed in ECU. In the rest of the countries prices have risen, particularly sharply in France and Belgium.

VIII. TRADE IN SOLID FUELS

38. Hard Coal: world trade and production

Hard coal production is estimated to have increased in 1990 by less than 1%, at around 3548 Mt. Two opposite trends can be observed among the main world producers. On the one hand countries with sustained growth in production, such as China, the United States, India, Australia and Colombia, as a whole increased their production throughout 1990 by 95 Mt. On the other hand, in those countries with falling production, either as a result of the rationalization of their own mining industries due to high costs, or for sociopolitical reasons or a combination of both, such as Poland, the USSR and the far eastern countries generally, mainly Japan and South Korea, plus the EEC countries, production loss was about 66 Mt.

Intra-regional trade in 1990 generally tended to fall. Intracommunity trade continued to show a slight tendency to decline, at around 8.5 Mt. As a result of their internal political and economic problems, the Comecon countries also recorded a drop, which is expected to continue in future. Finally trade between the USA and Canada fell back, due mainly to lower deliveries of coking coal.

Of the maritime hard coal trade, which represents only slightly more than 9% of world hard coal production, the Community, Japan and south east Asia represented by Hong Kong, South Korea and Taiwan absorb something over 81%, corresponding to 49.3% coking coal and the rest other hard coal qualities, principally steam coal. In all these countries imported hard coal makes up for a fall in their own hard coal production, which is steadily declining, and partly for new energy needs.

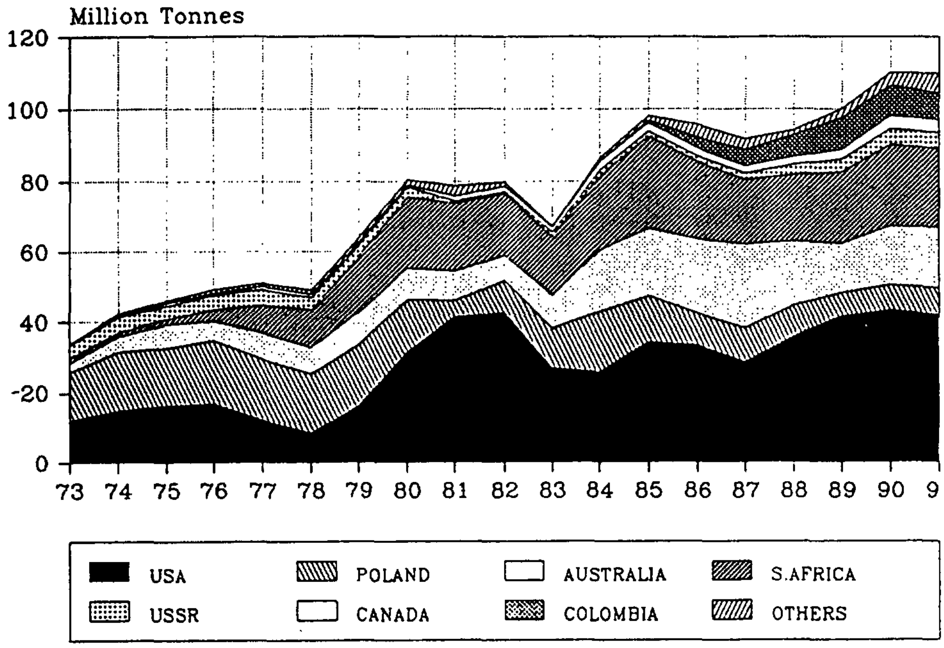
39. Community trade with third countries (Table 18)

Imports of hard coal from non-Community countries exceeded the 110 Mt mark in 1990, and although final figures are not yet available they are expected to reach 112.6 Mt. This would mean a rise of 9.7 Mt in relation to the previous year's imports.

Deliveries of hard coal did in fact fall by 0.9 Mt, while production fell by 9.6 Mt, so an additional 8.7 Mt in relation to the previous year should have been sufficient. In this light the additional 1 Mt must have gone into stocks, mainly of power stations.

All Community countries increased their imports except Denmark (-1.3 Mt) and Spain (-0.6 Mt); the following countries increased by more than one million tonnes in relation to the previous year: Germany (+3.1 Mt), the United Kingdom (+3.0 Mt), the Netherlands (+1.4 Mt) and Belgium (+1.2 Mt).

HARD COAL IMPORTED FROM THIRD COUNTRIES



In 1991 Community imports are expected to remain at a similar level, of the order of 111.8 Mt (-0.7%), although there are wide variations from one country to another, since although sharp increases are forecast in the United Kingdom (+3 Mt), Germany (+1.1 Mt) and Denmark (+1.3 Mt), pronounced reductions are planned in France (-4.2 Mt) and Spain (-1.5 Mt) as water availability is expected to fall within the historical averages.

The United States is still the Community's main supplier with 38.5% of its imports, followed by South Africa with 20%, Australia 15%, and Colombia and Poland some way behind. These countries together supplied 87.5% of the Community's imports in 1990.

For 1991, the United States and Colombia are likely to lose some of their market shares, although it is clear that this will not affect their position as the Community's major suppliers, to suppliers such as Poland and, to a much lesser extent, Indonesia and Venezuela. Moreover, China is not living up to the expectations of a few years ago, since its deliveries will drop from 2.4 Mt in 1990 to 1.8 Mt in 1991.

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

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

Hard coal trade is still declining slowly but steadily, to 8.5 Mt in 1990 from 9 Mt in 1989; on the basis of this trend 7.5 Mt are forecast for 1991.

Trade in coke is tending to decline similarly attaining 3.6 MT in 1990. For 1991 trade in coke is expected to stabilize.

Two Member States (Germany and Spain) have been able to protect their national coal industry during the year 1990 by way of an intra-community restriction on imports of coal originating in third countries.

In view of the 1993 single market and of coal policy principles, the Commission would consider a temporary extension of such a system with great care and on the basis of good proof of its justification.

Moreover, although hard coal is free to move between Member States, however, national production, consumption and pricing systems do not favour such movement. In addition, the prices producers are paid for their exports are mostly in line with those of deliveries from non-Community countries and, taking account of Community production costs, are therefore not profitable; this leads to a steady decline in intracommunity trade.

IX. STOCKS

41. Hard coal producers' stocks were reduced by 0.7 Mt in 1990, mainly in the United Kingdom (-0.9 Mt), Germany (-0.2 Mt) and Spain (-0.2 Mt); conversely, France increased its stocks by 0.6 Mt. At the end of 1990 available stocks represented 58 days' production for the whole Community. No significant change in stock levels is expected for next year.

Hardly any information was available at the time of writing on producers' coke stocks; it can only be said for the moment that stocks in Germany were increased by 0.5 Mt.

X. CONCLUSIONS

42. As in previous years the proportion of solid fuels in Community gross domestic energy consumption has continued to decline.

Deliveries of travel coal to coking plants fell by 4.8% Mt (-6.8% during 1990, while coke deliveries to steelworks fell by 2.1 Mt (-4.3%). For 1991 a further drop is expected for both coal deliveries to coking plants and coke to steelworks. Everything indicates that steel production will be cut back in 1991.

Deliveries of hard coal to power stations increased by 1.5% in 1990, mainly because of the sudden increases experienced in Germany and Portugal. A very moderate increase is forecast for 1991 (+0.2%). Power stations also consumed more petroleum products (+4.7%) and natural gas (+2.6%) according to latest estimates. In absolute terms nuclear power stayed at a level similar to last year; expansion is planned for 1991, however (+2.9%).

Deliveries of hard coal to other industries also fell back significantly in 1990 (-9.8%), despite good overall industrial and economic growth figures, albeit down on 1989. A further loss of some 1.2% is forecast for 1991.

The domestic sector has continued to contract owing not only to favourable weather conditions but also to the rejection in several areas of solid-fuel heating, a trend which will continue in future.

Prices of hard coal from non-Community countries have risen steadily in relation to the US dollar, and this is expected to continue. Fortunately, rising hard coal prices have been offset and overtaken by the appreciation of Community currencies in relation to the dollar.

Political uncertainty still bedevils the eastern countries and South Africa, although there are signs of an improvement, even if the road is long and difficult.

The oil market has been unstable as a result of the conflict in the Persian Gulf; spectacular price rises for crude were recorded but more as a result of uncertainty and speculative manoeuvres than supply problems, so there has been no imbalance between supply and demand.

Finally, concern for environmental issues, especially the greenhouse effect, has led to a number of initiatives which are at the discussion or planning stage, such as the possibility of adopting economic or fiscal instruments on the use of all types of energy. This does not prevent solid fuels from continuing to play an important part in satisfying Community energy needs.

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TABLE 1 A

GROSS INTERNAL ENERGY CONSUMPTION

COMMUNITY

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	1989 Actual		1990 Provisional		1991 Forecasts	
	million toe	%	million toe	%	million toe	%
Solid fuels	230.8	21.02%	230.2	20.62%	230.6	20.41%
Oil	491.4	44.75%	502.6	45.02%	498.2	44.10%
Natural gas	201.4	18.34%	208.0	18.63%	218.3	19.32%
Nuclear energy	156.9	14.29%	157.2	14.08%	162.6	14.39%
Other	17.7	1.61%	18.3	1.64%	20.0	1.77%
total	1098.2	100.00%	1116.3	100.00%	1129.7	100.00%

Source : Energy-Monthly statistics n.1/1991-Series 4B-EUROSTAT
Energy in Europe-DG XVII

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TABLE 1 B

Share of solid fuels in gross internal energy consumption

20-Feb-91

	Year	Hard coal		Lignite and peat		Total Solid Fuels	
		M Toe	%	M Toe	%	M Toe	%
E	73	194.489	20.87%	27.529	2.95%	222.018	23.82%
U	74	187.700	20.62%	29.336	3.22%	217.036	23.84%
R	75	166.917	19.42%	27.188	3.16%	194.105	22.58%
	76	176.579	19.27%	32.202	3.51%	208.781	22.78%
1	77	173.450	18.99%	29.948	3.28%	203.398	22.27%
0	78	175.717	18.66%	29.809	3.17%	205.526	21.83%
	79	191.291	19.39%	31.859	3.23%	223.150	22.62%
E	80	202.458	19.75%	35.541	3.47%	237.999	23.22%
U	81	200.988	20.27%	37.515	3.78%	238.503	24.06%
R	82	197.263	20.46%	37.341	3.87%	234.604	24.34%
	83	192.392	19.94%	37.975	3.94%	230.367	23.87%
1	84	180.675	18.23%	39.050	3.94%	219.725	22.17%
2	85	200.664	19.49%	38.356	3.73%	239.020	23.21%
	86	195.695	18.71%	35.795	3.42%	231.490	22.13%
	87	198.084	18.63%	33.113	3.11%	231.197	21.75%
	88	193.300	17.95%	33.400	3.10%	226.700	21.05%
	89	196.000	17.85%	34.800	3.17%	230.800	21.02%
	90	195.600	17.52%	34.600	3.10%	230.200	20.62%
	91	194.500	17.22%	36.100	3.20%	230.600	20.41%

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TABLE 3

COMMUNITY HARD COAL DELIVERIES BY SECTOR AND BY COUNTRY

20-Feb-91 (Million tonnes)

	COMMUNITY				
	1989 Actual	1990 Provisional	1991 Forecasts	1990/1989 % Difference	1991/1990 % Difference
A. SECTOR					
- Thermal power stations (1)	200.4	203.5	203.8	1.55%	0.15%
- Coke ovens	70.6	65.8	63.4	-6.80%	-3.65%
- Iron and steel industry	3.9	5.8	6.2	48.72%	6.90%
- Other industries	23.5	21.8	22.0	-7.23%	0.92%
- Domestic sector and coal workers	12.2	9.3	9.0	-23.77%	-3.23%
- Patent fuel plants	1.9	2.6	2.5	36.84%	-3.85%
- Own consumption at mines	0.8	0.5	0.5	-37.50%	0.00%
- Gasworks	-	-	-		
- Others	0.2	3.3	2.9	1550.00%	-12.12%
Total	313.5	312.6	310.3	-0.29%	-0.74%
B. COUNTRY					
Belgium	14.3	15.6	15.2	9.09%	-2.44%
Denmark	10.6	9.1	11.4	-14.15%	25.27%
Germany	78.4	80.2	81.5	2.30%	1.62%
Spain	30.5	29.5	27.7	-3.28%	-6.10%
France	29.4	26.0	23.3	-11.56%	-10.38%
Greece	1.3	1.3	1.3	0.00%	0.00%
Ireland	3.4	3.3	3.3	-2.94%	0.00%
Italy	20.8	21.4	20.7	2.88%	-3.27%
Luxemburg	0.2	0.2	0.2	0.00%	0.00%
Netherlands	12.9	12.8	12.8	-0.78%	0.00%
Portugal	3.7	4.8	4.4	29.73%	-8.33%
United Kingdom	108.0	108.4	108.5	0.37%	0.09%
COMMUNITY	313.5	312.6	310.3	-0.29%	-0.73%

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

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TABLE 4

COKE DELIVERIIES BY SECTOR AND BY COUNTRY

20-Feb-91 ('000 tonnes)

	COMMUNITY				
	1989 Actual	1990 Provisional	1991 Forecasts	1990/1989 % Difference	1991/1990 % Difference
A. SECTOR					
- Iron and steel industry	48467	46367	45101	-4.33%	-2.73%
- Other industries	3269	2486	2398	-23.95%	-3.54%
- Domestic sector	1209	1281	1201	5.96%	-6.25%
- Others	1336	1213	1252	-9.21%	3.22%
Total	54281	51347	49952	-5.41%	-2.72%
B. COUNTRY					
Belgium	5170	5450	5375	5.42%	-1.38%
Denmark	40	35	35	-12.50%	0.00%
Germany	18142	16030	15700	-11.64%	-2.06%
Spain	3380	3521	3495	4.17%	-0.74%
France	8620	7740	7500	-10.21%	-3.10%
Greece	50	30	30	-40.00%	0.00%
Ireland	6	11	10	83.33%	-9.09%
Italy	6673	6407	5556	-3.99%	-13.28%
Luxemburg	1486	1451	1569	-2.36%	8.13%
Netherlands	2300	2500	2500	8.70%	0.00%
Portugal	294	272	282	-7.48%	3.68%
United Kingdom	8120	7900	7900	-2.71%	0.00%
COMMUNITY	54281	51347	49952	-5.41%	-2.72%

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TABLE 5

DELIVERIES OF HARD COAL TO COKING PLANTS (1)

20-Feb-91 ('000 tonnes)

1989 : Actual 1990 : Provisional 1991 : Forecasts		National hard coal	Hard coal from other ECSC countries	Total ECSC hard coal	Hard coal from third countries	Total supplies
Belgium	1989	24	899	923	6157	7080
	1990			0		7200
	1991			0		7100
Germany	1989	23424		23424		23424
	1990			0		22460
	1991			0		21450
Spain	1989	387	328	715	3829	4544
	1990			0		4048
	1991			0		4100
France	1989	2298	931	3229	6277	9506
	1990			0		8300
	1991			0		8000
Italy	1989		1243	1243	7891	9134
	1990			0		8783
	1991			0		8213
Netherlands	1989	98	509	607	3741	4348
	1990			0		4000
	1991			0		4000
Portugal	1989			0	331	331
	1990			0		0
	1991			0		0
United Kingdom	1989	4129		4129	8076	12205
	1990			0		11000
	1991			0		10500
Community	1989	30360	3910	34270	36302	70572
	1990	0	0	0	0	65791
	1991	0	0	0	0	63363

(1) For 1990 and 1991 the breakdown by origin is not available

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TABLE 6 A

DELIVERIES OF HARD COAL TO POWER STATIONS

20-Feb (tonnes)

1989 : Actual 1990 : Provisional 1991 : Forecasts		Public power stations (1)					Private generating plants		
		National hard coal	Hard coal from other ECSC countries	Total ECSC hard coal	Hard coal from third countries	Total public power stations	collie-ries	other industry	Total
Belgium	1989	2263		2263	2944	5207	200	129	5536
	1990			0		5860	110		5970
	1991			0		5600	70		5670
Denmark	1989		455	455	9190	9645		49	9694
	1990			0		8200			8200
	1991			0		10500			10500
Germany	1989	33043	218	33261	3167	36428	7489	3292	47209
	1990			0		43930	1970	5000	50900
	1991			0		46500	1800	5000	53300
Spain	1989	18068		18068	3837	21905		67	21972
	1990			0		22367			22367
	1991			0		20000			20000
France	1989	2217	265	2482	3969	6451	4620	449	11520
	1990			0		6600	3700	50	10350
	1991			0		4600	3600	50	8250
Greece	1989			0		0			0
	1990			0		0			0
	1991			0		0			0
Ireland	1989	48		48	1964	2012		19	2031
	1990			0		2010			2010
	1991			0		2070			2070
Italy	1989	75		75	10120	10195		13	10208
	1990			0		10217			10217
	1991			0		10000			10000
Luxemburg	1989			0		0		2	2
	1990			0		0			0
	1991			0		0			0
Netherlands	1989		165	165	7643	7808		84	7892
	1990			0		7800			7800
	1991			0		7800			7800
Portugal	1989	258		258	2344	2602			2602
	1990			0		3642			3642
	1991			0		3165			3165
United Kingdom	1989	78399		78399	1964	80363	40	1313	81716
	1990			0		82000			82000
	1991			0		83000			83000
Community	1989	134371	1103	135474	47142	182616	12349	5417	200382
	1990	0	0	0	0	192626	5780	5050	203456
	1991	0	0	0	0	193235	5470	5050	203755

(1) For 1990 and 1991 the breakdown by origin is not available

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TABLE 6 B

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

20-Feb-91 (Million tonnes)

	1989 Actual	1990 Provisional	1991 Forecasts	1990/1989 % Difference	1991/1990 % Difference
BELGIUM					
- Hard coal	5.4	5.9	5.7	9.26%	-3.39%
DENMARK					
- Hard coal	9.6	8.2	10.5	-14.58%	28.05%
GERMANY					
- Hard coal	43.9	45.9	48.3	4.56%	5.23%
- Black lignite	2.1	2.0 a	1.9 a	-4.76%	-5.00%
- Brown coal	93.7	91.6	91.5	-2.24%	-0.11%
SPAIN					
- Hard coal	21.9	22.4	20.0	2.28%	-10.71%
- Brown coal	17.3	15.5	15.4	-10.40%	-0.65%
FRANCE					
- Hard coal	11.1	10.3	8.2	-7.21%	-20.39%
- Black lignite	1.5	1.4	1.5	-6.67%	7.14%
- Brown coal	0.5	0.5 a	0.4 a	0.00%	-20.00%
GREECE					
- Hard coal	-				
- Brown coal	49.9	53.6	58.1	7.41%	8.40%
IRELAND					
- Hard coal	2.1	2.0	2.0	-4.76%	0.00%
- Peat	3.0	3.5	3.5	16.67%	0.00%
ITALY					
- Hard coal	10.2	10.2	10.0	0.00%	-1.96%
- Brown coal	1.6	1.6	1.5	0.00%	-6.25%
NETHERLANDS					
- Hard coal	7.8	7.8	7.8	0.00%	0.00%
PORTUGAL					
- Hard coal	2.6	3.6	3.2	38.46%	-11.11%
UNITED KINGDOM					
- Hard coal	80.4	82.0	83.0	1.99%	1.22%
COMMUNITY					
- Hard coal	195.0	198.3	198.7	1.69%	0.20%
- Black lignite	3.6	3.4	3.4	-5.56%	0.00%
- Brown coal *	166.0	166.3	170.4	0.18%	2.47%

* Including peat

a Estimations of the Commission of the European Communities

TABLE 7

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

20-Feb-91 ('000 tonnes)

	1989 Actual	1990 Provisional	1991 Forecasts	1990/1989 % Difference	1991/1990 % Difference
A. HARD COAL					
Belgium	1356	1255	1250	-7.45%	-0.40%
Denmark	527	500	500	-5.12%	0.00%
Germany	5144	2700	2700	-47.51%	0.00%
Spain	2499	2185	2600	-12.57%	18.99%
France	4297	3700	3500	-13.89%	-5.41%
Greece	1169	1220	1220	4.36%	0.00%
Ireland	467	550	550	17.77%	0.00%
Italy	981	1223	1200	24.67%	-1.88%
Luxemburg	160	160	160	0.00%	0.00%
Netherlands	357	200	200	-43.98%	0.00%
Portugal	837	830	901	-0.84%	8.55%
United Kingdom	6387	7280 *	7280 *	13.98%	0.00%
COMMUNITY	24181	21803	22061	-9.83%	1.18%
B. COKE					
Belgium	176	145	145	-17.61%	0.00%
Denmark	31	30	30	-3.23%	0.00%
Germany	938	950	900	1.28%	-5.26%
Spain	220	356	350	61.82%	-1.69%
France	1018	680	650	-33.20%	-4.41%
Greece	17	10	10	-41.18%	0.00%
Ireland	0	4	2		-50.00%
Italy	100	0	0	-100.00%	
Luxemburg	0	0	0		
Netherlands	292	100	100	-65.75%	0.00%
Portugal	34	11	11	-67.65%	0.00%
United Kingdom	350	200	200	-42.86%	0.00%
COMMUNITY	3176	2486	2398	-21.73%	-3.54%

* Estimations of the Commission of the European Communities

TABLE 8

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

20-Feb-91 ('000 TONNES)

1989 : Actual 1990 : Provisional 1991 : Forecasts		BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
A. HARD COAL, PATENT FUELS, COKE														
Hard coal	1989	737	455	1073	578	1780	1	947	65	1	17	2	6772	12428
	1990	605		710	474	1520		730		1			5300	9340
	1991	600		800	550	1420		700		1			5000	9071
Patent fuels	1989	33		440	5	373					3		589	1443
	1990	5		650		500							1500	2655
	1991	5		580		490							1400	2475
Coke	1989	24	4	737		187	3		88				1568	2611
	1990	20		600		160				1			500	1281
	1991	20		530		150				1			500	1201
Total	1989	794	459	2250	583	2340	4	947	153	1	20	2	8929	16482
	1990	630	0	1960	474	2180	0	730	0	2	0	0	7300	13276
	1991	625	0	1910	550	2060	0	700	0	2	0	0	6900	12747
% 1990/1989		-20.7	-100.0	-12.9	-18.7	-6.8	-100.0	-22.9	-100.0	100.0	-100.0	-100.0	-18.2	-19.5
% 1991/1990		-0.8		-2.6	16.0	-5.5		-4.1		0.0			-5.5	-4.0
B. LIGNITE BRIQUETTES AND PEAT BRIQUETTES	1989	36	7	1420	1671	102	149	450		21	1			3857
	1990	25		1515		65		30		10				1645
	1991	25		1300		60		40		10				1435

TABLE 9

DELIVERIES OF LIGNITE AND PEAT BY SECTOR AND BY MEMBER STATE

20-Feb-91

(MILLION TONNES)

1989 : Actual 1990 : Provisional 1991 : Forecasts	RAW PRODUCTS											
	POWER STATIONS			BRIQUETTING PLANTS			OTHERS			TOTAL		
	1989	1990	1991	1989	1990	1991	1989	1990	1991	1989	1990	1991
BELGIQUE	-	-	-	-	-	-	0.3	-	-	0.3	0.0	0.0
DANMARK	-	-	-	-	-	-	-	-	-	0.0	0.0	0.0
DEUTSCHLAND	95.8	93.6	93.4	12.8	14.5	15.5	1.7	1.5	1.6	110.3	109.5	110.5
ESPANA	17.3	15.5	15.4	-	-	-	-	-	-	17.3	15.5	15.4
FRANCE	1.9	1.9	1.9	-	-	-	0.3	0.2	0.2	2.2	2.1	2.1
HELLAS	50.0	53.6	58.1	0.5	0.4	0.4	1.4	1.5	1.5	51.9	55.5	60.0
IRELAND	3.0	3.5	3.5	1.1	1.3	1.3	1.7	2.2	2.2	5.8	7.0	7.0
ITALIA	1.6	1.6	1.5	-	-	-	-	-	-	1.6	1.6	1.5
LUXEMBOURG	-	-	-	-	-	-	-	-	-	0.0	0.0	0.0
NEDERLAND	-	-	-	-	-	-	-	-	-	0.0	0.0	0.0
PORTUGAL	-	-	-	-	-	-	-	-	-	0.0	0.0	0.0
UNITED KINGDOM	-	-	-	-	-	-	-	-	-	0.0	0.0	0.0
COMMUNITY	169.6	169.7	173.8	14.4	16.2	17.2	5.4	5.4	5.5	189.4	191.2	196.5

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TABLE 10

HARD COAL PRODUCTION BY AREA

20-Feb-91 ('000 TONNES)

	1989	1990	1991
KEMPEN	1885	1025	550
BELGIUM	1885	1025	550
RUHR	61271	59780	57690
AACHEN	4142	3820	3420
IBBENBUREN	2135	2115	2110
SAAR + KLEINZECHEN	9903	10010	9610
GERMANY	77451	75725	72830
CENTRAL ASTURIANA	4652	4750	4750
BIERZO, VILLABLINO, NARCEA	5567	4837	4960
LEON, PALENCIA	2455	2496	2500
SUR	1850	2005	1990
ARAGON,CATALUNA, BALEARES	4652	4844	4800
SPAIN	19176	18932	19000
NORD-PAS-DE-CALAIS	489	230	0
LORRAINE	8815	8650	8400
CENTRE-MIDI	2167	1920	1900
FRANCE	11471	10800	10300
IRELAND	62	35	25
ITALIA	74	50	54
PORTUGAL	258	280	280
SCOTLAND	1955	NA	NA
NORTHERN	10071	NA	NA
YORKSHIRE	26980	NA	NA
NORTH-WESTERN	7883	NA	NA
MIDLANDS-KENT	27926	NA	NA
SOUTH WALES	3799	NA	NA
BC OPENCAST	17565	17000	17000
LICENSED MINES + OPENCAST	2106	3000	3000
UNITED KINGDOM	98285	92300	87500
E U R 1 2	208662	199147	190539

TABLE 11 A

COKE PRODUCTION

20-Feb-91 (MILLION T PER ANNUM)

	Coke production capacity	% difference compared with the previous year	Hard coal consumption	Coke production
1989 : Actual				
BELGIQUE	6.1		7.1	5.4
DEUTSCHLAND	19.8	-6.2%	24.1	18.4
ESPANA	3.8		4.6	3.2
FRANCE	7.5	-1.3%	9.5	7.3
ITALIA	10.0	-2.0%	9.1	6.7
NEDERLAND	3.0		4.0	2.9
PORTUGAL	0.3		0.3	0.3
UNITED KINGDOM	8.3 *	-1.2%	12.2 *	8.4
COMMUNITY	58.8	-4.1%	70.9	52.6
1990 : Provisional				
BELGIQUE	6.1	0.0%	7.2	5.4
DEUTSCHLAND	19.5	-1.5%	22.5	17.8
ESPANA	3.8	0.0%	4.0	3.4
FRANCE	7.5	0.0%	8.3	6.6
ITALIA	10.0	0.0%	8.8	6.4
NEDERLAND	3.0	0.0%	4.0	2.9
PORTUGAL	0.3	0.0%		0.3
UNITED KINGDOM	8.5 *	2.4%	11.0 *	8.0
COMMUNITY	58.7	-0.2%	65.8	50.8
1991 : Forecasts				
BELGIQUE	6.0	-1.6%	7.1	5.4
DEUTSCHLAND	19.5	0.0%	21.5	16.9
ESPANA	3.8	0.0%	4.1	3.4
FRANCE	7.5	0.0%	8.0	6.5
ITALIA	8.8	-12.0%	8.2	5.7
NEDERLAND	3.0	0.0%	4.0	2.9
PORTUGAL	0.3	0.0%		0.3
UNITED KINGDOM	8.7 *	2.4%	10.5 *	7.8
COMMUNITY	57.6	-1.9%	63.4	48.9

* Without LTC for United Kingdom

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TABLE 11 B

COKING PLANT CAPACITY DISTRIBUTION

20-Feb-91 (Million tonnes)

	1989 Actual	1990 Provisional	1991 Forecasts
- Colliery plants	15.3	15.0	15.1
- Iron and steel industry	40.9	41.1	39.9
- Independent (*)	2.6	2.6	2.6
Total	58.8	58.7	57.6

* Without LTC for the United Kingdom

TABLE 12 A

PERSONNEL EMPLOYED UNDERGROUND
(yearly average)

20-Feb-91 ('000)

	1989 Actual	1990 Provisional	1991 Forecasts
Belgium	4.7	2.3	1.1
Germany	94.8	88.5	83.0
Spain	34.8	35.0	32.3
France	11.7	9.8	8.0
Portugal	0.6	0.6 *	0.6 *
United Kingdom	62.6	53.3	47.0
Ireland	0.3	0.3	0.1
COMMUNITY	209.5	189.8	172.1

* Carbonifera do Dovro

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TABLE 12 B

OUTPUT PER MAN/HOUR UNDERGROUNG

20-Feb-91 (Kg per man/hour)

	1989 Actual	1990 Provisional	1991 Forecasts
Belgium	328	361	364
Germany	645	670	NA
Spain	329	341	354
France	589	625	709
Portugal			
United Kingdom	680	712	776
COMMUNITY	599	622	NA

NA : Not available

TABLE 13

INVESTMENTS IN THE COAL INDUSTRY
(COAL EXTRACTION AND PREPARATION)

20-Feb-91 (million ECU)

	1989 Actual	1990 Provisional	1991 Forecasts
Belgium	10.9	1.2	
Germany	294.6	383.1	203.1
Spain	NA	NA	NA
France	44.5	39.0	26.8
Italy	42.9	60.3	58.6
Portugal	0.8	0.4	0.0
United Kingdom	664.8	463.0	437.6
COMMUNITY (1)	1058.5	947.0	726.1

(1) SPAIN EXCLUDED

TABLE 14

Exchange rates : US $ - European currencies

20-Feb-91

1 US Dollar =	BFR	DKR	DM	DRA	PTA	FF	IRL	LIT	HFL	ESC	UKL	ECU
1989												
1st.quarter	38.7497	7.18850	1.84960	154.590	115.550	6.29010	0.692500	1356.26	2.08760	151.980	0.572000	0.887900
2nd.quarter	40.4595	7.52150	1.93260	164.980	121.500	6.54280	0.723800	1407.75	2.17850	160.210	0.615200	0.930000
3rd.quarter	40.2527	7.47280	1.92310	166.200	120.540	6.50420	0.720500	1385.66	2.16840	161.020	0.626300	0.927200
4th.quarter	38.0520	7.04670	1.81150	163.610	115.870	6.16580	0.683800	1334.92	2.04480	156.420	0.630800	0.885200
YEAR 1989	39.3743	7.30590	1.87900	162.320	118.360	6.37520	0.705100	1370.97	2.11960	157.400	0.611100	0.907600
1990												
1st.quarter	35.2851	6.5163	1.69074	159.454	109.114	5.73449	0.637090	1254.28	1.90547	149.119	0.603609	0.829284
2nd.quarter	34.6112	6.3940	1.67816	164.074	104.978	5.64385	0.625972	1232.56	1.88836	148.074	0.596984	0.818209
3rd.quarter	32.7742	6.0802	1.59325	156.548	98.670	5.34238	0.593886	1176.96	1.79531	140.710	0.537203	0.771300
4th.quarter	30.9872	5.7575	1.50157	153.589	95.041	5.06103	0.561664	1128.63	1.69344	132.581	0.513998	0.731690
YEAR 1990	33.4144	6.1870	1.61593	158.416	101.950	5.44544	0.604653	1198.11	1.82064	142.621	0.562948	0.787621
% Difference												
4th.Qu.90/4th.Qu.89	-18.57%	-18.29%	-17.11%	-6.13%	-17.98%	-17.92%	-17.86%	-15.45%	-17.18%	-15.24%	-18.52%	-17.34%
Year1990/Year1989	-15.14%	-15.32%	-14.00%	-2.41%	-13.86%	-14.58%	-14.25%	-12.61%	-14.10%	-9.39%	-7.88%	-13.22%

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TABLE 15 A

AVERAGE CIF PRICES FOR COAL IMPORTED FROM THIRD COUNTRIES

(US $)

	1989				1990			
	1Q/1989	2Q/1989	3Q/1989	4Q/1989	1Q/1990	2Q/1990	3Q/1990	4Q/1990
A. STEAM COAL (1)								
NCV (Kj/Kg)	26287	26423	26258	26190	26078	26469	26443	
- per tonne (t=t)	42.87	44.99	45.65	46.51	47.21	48.27	49.81	0.00
- per tonne = 29.3 GJ	47.80	49.90	50.95	52.05	53.05	53.45	55.20	
B. COKING COAL (2)								
NCV (Kj/Kg)	29386	29386	29386	29386	29386	29386	29386	29386
- per standard tonne (3) (4)	54.85	56.65	57.10	57.50	57.80	59.00	59.40	59.80
- per tonne = 29.3 GJ	54.70	56.50	56.95	57.35	57.65	58.85	59.25	59.65
Ratio B/A (%) per tonne = 29.3 GJ	114.44%	113.22%	111.77%	110.17%	108.67%	110.10%	107.34%	

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

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

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

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

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

TABLE 15 B

COKING COAL IMPORTS

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

20-Feb-91

Reference date	USD	BFR	DKR	DM	DRA	PTA	FF	IRL	LIT	HFL	ESC	UKL	ECU
1989													
1st.quarter	54.85	2125	394.29	101.45	8479	6338	345.01	37.98	74391	114.50	8336	31.37	48.701
2nd.quarter	56.65	2292	426.09	109.48	9346	6883	370.65	41.00	79749	123.41	9076	34.85	52.685
3rd.quarter	57.10	2298	426.70	109.81	9490	6883	371.39	41.14	79121	123.82	9194	35.76	52.943
4th.quarter	57.50	2188	405.00	104.00	9408	6663	355.00	39.00	76758	118.00	8994	36.00	51.000
1990													
1st.quarter	57.80	2039	376.64	97.72	9216	6307	331.45	36.82	72497	110.14	8619	34.89	47.933
2nd.quarter	59.00	2042	377.24	99.01	9680	6194	332.99	36.93	72721	111.41	8736	35.22	48.274
3rd.quarter	59.40	1947	361.16	94.64	9299	5861	317.34	35.28	69912	106.64	8358	31.91	45.815
4th.quarter	59.80	1853	344.30	89.79	9185	5683	302.65	33.59	67492	101.27	7928	30.74	43.755
% Difference													
4th.Qu.90/1st.Qu.89	9.02%	-12.82%	-12.68%	-11.49%	8.32%	-10.33%	-12.28%	-11.57%	-9.27%	-11.56%	-4.89%	-2.03%	-10.16%

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TABLE 15 C

STEAM COAL IMPORTS

AVERAGE PRICE IN NATIONAL CURRENCIES PER TONNE OF 29.3 GJ

04-Mar-91

Reference date	USD	BFR	DKR	DM	DRA	PTA	FF	IRL	LIT	HFL	ESC	UKL	ECU
1989													
1st.quarter	47.80	1852	343.61	88.41	7389	5523	300.67	33.10	64829	99.79	7265	27.34	42.442
2nd.quarter	49.90	2019	375.32	96.44	8233	6063	326.49	36.12	70247	108.71	7994	30.70	46.407
3rd.quarter	50.95	2051	380.74	97.98	8468	6142	331.39	36.71	70599	110.48	8204	31.91	47.241
4th.quarter	52.05	1981	366.78	94.29	8516	6031	320.93	35.59	69483	106.43	8142	32.83	46.075
1990													
1st.quarter	53.05	1872	345.69	89.69	8459	5788	304.21	33.80	66539	101.09	7911	32.02	43.994
2nd.quarter	53.45	1850	341.76	89.70	8770	5611	301.66	33.46	65880	100.93	7915	31.91	43.733
3rd.quarter	55.20	1809	335.63	87.95	8641	5447	294.90	32.78	64968	99.10	7767	29.65	42.576
4th.quarter	0.00	0	0.00	0.00	0	0	0.00	0.00	0	0.00	0	0.00	0.000
% Difference													
3rd.Qu.90/3rd.Qu.89	8.34%	-11.79%	-11.85%	-10.24%	2.05%	-11.32%	-11.01%	-10.70%	-7.98%	-10.30%	-5.32%	-7.07%	-9.88%

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TABLE 16

DELIVERED PRICE FOR DOMESTIC COAL

(INCLUDING TAXES) (ECU/TCE)

15- Feb-91

		BELGIQUE	DEUTSCH-LAND	ESPAËA	FRANCE	IRELAND	ITALIA	NEDERLAND	UNITED KINGDOM
1-7-1989	PRICE	236.8336	281.8564	154.9179	296.8528	178.8052	292.8113	292.7885	208.3061
	EXCHANGE RATE ECU/ NATIONAL CURRENCIES	43.3127	2.06858	130.813	7.02389	0.778575	1497.47	2.33134	0.68129
1-7-1990	PRICE	248.9782	278.2662	158.8668	316.3525	188.5656	282.37	301.2201	192.8141
	EXCHANGE RATE ECU/ NATIONAL CURRENCIES	42.4038	2.06253	126.707	6.9281	0.769092	1514.71	2.32133	0.709315
% Difference (1990/89)		5.13	-1.27	2.55	6.57	5.46	-3.57	2.88	-7.44

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TABLE 17

WORLD COAL PRODUCTION AND TRADE

20-Feb-91 (Million tonnes)

I. WORLD TRADE BY COUNTRY AND REGION	1988	1989	1990 ESTIMATES	1991 FORECASTS
Community imports from third countries	96	103	113	112
Imports, Japan	104	106	107	108
Imports, NIC-East Asia (1)	52	52	53	55
Imports, other countries	58	60	62	64
Sub-total coal sea-borne trade (a)	310	321	335	339
Coking coal	162	163	165	165
Others	148	158	170	174
Intra-Community coal trade	9	9	9	8
Intra-Comecon trade (2)	36	35	33	31
United States - Canada trade	18	15	14	14
Sub-total coal regional trade (b)	63	59	56	53
Total : Coal world trade (c) (c) = (a) + (b)	373	380	391	392
Coking coal	186	185	188	187
Others	187	195	203	205
Difference from year to year (%)	6.9	1.9	2.9	0.3
II. WORLD PRODUCTION OF COAL				
Western Europe	215	208	199	
(EUR)	215	208	199	
North America	831	876	928	
(United States)	799	835	890	
(Canada)	32	41	38	
USSR	599	575	544	
China	946	971	983	
Poland	193	177	153	
South Africa	178	169	153	
Australia	148	151	164	
India	188	199	210	
Japan	11	10	8	
Latin America	34	39	44	
Rest of the World	160	162	162	
Total world production of coal (d)	3503	3537	3548	
III. SEA-BORNE TRADE OF COAL IN % OF WORLD PRODUCTION : (a)/(d)	8.8	9.1	9.4	

(1) Newly Industrialising Countries in East Asia: Hongkong, South Korea, Taiwan
(2) Countries with centrally planned economy (Bulgaria, Czechoslovakia, East Germany, Hungary, Poland, Romania, USSR)

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TABLE 18

IMPORTS OF HARD COAL FROM THIRD COUNTRIES

1988 -1990

20-Feb-91 (Million tonnes)

	1988 Actual	1989 Actual	1990 Provisional	1991 Forecasts
A. BY COUNTRY OF DESTINATION				
Belgium	9.4	10.9	12.1	12.3
Denmark	9.7	10.3	9.0	10.3
Germany	6.8	5.7	8.8	9.9
Spain	8.7	10.2	9.6	8.1
France	10.3	14.1	15.0	10.8
Greece	1.5	1.2	1.3	1.3
Ireland	2.9	2.8	2.8	2.8
Italy	18.7	19.3	20.3	20.0
Luxemburg	0.1	0.2	0.2	0.2
Netherlands	13.5	13.2	14.6	14.6
Portugal	2.8	3.5	4.4	4.0
United Kingdom	11.3	11.5	14.5	17.5
COMMUNITY	95.7	102.9	112.6	111.8
B. BY COUNTRY OF ORIGIN				
USA	35.9	41.7	43.3	42.0
Canada	2.2	2.7	3.6	3.5
Australia	18.0	13.7	16.7	17.0
South Africa	19.3	20.6	23.0	22.5
Poland	8.8	6.6	7.2	7.7
USSR	2.7	3.5	4.3	4.3
China	1.5	3.0	2.4	1.8
Colombia	6.0	8.7	8.3	7.2
Others	1.3	2.4	3.8	5.8
COMMUNITY	95.7	102.9	112.6	111.8

TABLEAU | H O U I L L E | ECHANGES INTRA-COMMUNAUTAIRES
TABLE 19 A | C O A L | INTRA-COMMUNITY EXCHANGES | 1991
TABELLE | S T E I N K O H L E | ECHANGES INTRA-COMMUNAUTAIRES

20-Feb-91 ('000 TONNES)

DE-FROM-VON / EN-TO-A	BELGIQUE	DANMARK	DEUTSCHLAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEMBOURG	NEDERLAND	PORTUGAL	UNITED KINGDOM	RECEPTIONS RECEIPT/BEZUG
													0
BELGIQUE	0		800							400		50	1250
	0		1450		15					55		80	1600
DANMARK		0										300	300
		0										400	400
DEUTSCHLAND	65		0							1850		150	2065
	150		0		350					50		250	800
ESPANA	20		500	0								100	620
	30		300	0	20							50	400
FRANCE	245		1200		0					300		175	1920
	90		1150		0					10		250	1500
HELLAS						0							0
						0							0
IRELAND							0					150	150
	8		70		45		0			50		400	573
ITALIA	10		800					0					810
			550					0					550
LUXEMBOURG	60								0				60
	40		2						0				42
NEDERLAND	165		500							0			665
	200		700		100					0			1000
PORTUGAL	5										0	75	80
				10	3						0	170	183
UNITED KINGDOM	5		200				20			250		0	475
	50		450									0	500
EXPEDITIONS													
DELIVERIES	575	20 *	4000	0	462 *	0	20	0	0	2800	0	1000	8877
LIEFERUNGEN	568	0	4672	10	533	0	0	0	0	165	0	1600	7548

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

* Commission Forecasts

TABLEAU HOUILLE — ECHANGES INTRA-COMMUNAUTAIRES
TABLE 19 B COAL — INTRA-COMMUNITY EXCHANGES — 1990
TABELLE STEINKOHLE — ECHANGES INTRA-COMMUNAUTAIRES

20-Feb-91 ('000 TONNES)

DE-FROM-VON / EN-TO-A	BELGIQUE	DANMARK	DEUTSCHLAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEMBOURG	NEDERLAND	PORTUGAL	UNITED KINGDOM	RECEPTIONS RECEIPT/BEZUG
													0
BELGIQUE	0		1000							400		70	1470
	0		1475		20					60		90	1645
DANMARK		0										500	500
		0										650	650
DEUTSCHLAND	65		0							1850		270	2185
	100		0		300					50		250	700
ESPANA	30		500	0								110	640
	43		460	0	14							103	620
FRANCE	255		1600		0					300		280	2435
	140		1380		0					10		170	1700
HELLAS						0							0
						0							0
IRELAND							0					260	260
	8		70		45		0			50		400	573
ITALIA	10		1000					0					1010
			901					0					901
LUXEMBOURG	60								0				60
	40		3						0				43
NEDERLAND	170		500							0		20	690
	200		700		100					0			1000
PORTUGAL	10										0	90	100
				10	3						0	183	196
UNITED KINGDOM	5		200				25			250		0	480
	50		450									0	500
EXPEDITIONS DELIVERIES	605	20 *	4800	0	520 *	0	25	0	0	2800	0	1600	10370
LIEFERUNGEN	581	0	5439	10	482	0	0	0	0	170	0	1846	8528

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

* Commission Forecasts

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

20-Feb-91 ('000 TONNES)

DE-FROM-VON	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	RECEPTIONS RECEIPT/BEZUG
EN-TO-A	0	0	0	0	0	0	0	0	0	0	0	0	0
BELGIQUE	0		100							300			400
	0		165		20					230			415
DANMARK		0											0
		0											20
DEUTSCHLAND	295		0					3		100			398
	200		0		150					40		10	400
ESPANA				0				7					7
			5	0	25			5				10	45
FRANCE	330		100		0			35		300			765
	320		370		0					160			900
HELLAS						0		7					7
						0		10					10
IRELAND							0						0
	3						0					2	5
ITALIA	20		100					0					120
								0					0
LUXEMBOURG	155		800						0				955
	242		1178		1				0				1421
NEDERLAND	25		80							0			105
	100		100		100					0			300
PORTUGAL											0		0
				7	5						0		12
UNITED KINGDOM			20							50		0	70
												0	100
EXPEDITIONS													
DELIVERIES	825	0	1200	0	100	0	0	52	0	750	0	100 a	3027
LIEFERUNGEN	865	0	1818	7	301	0	0	15	0	430	0	22	3628

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

* Commission forecasts a : break down by country not available b : break down by country not available for 50000 t

TABLEAU COKE DE FOUR ECHANGES INTRA-COMMUNAUTAIRES
TABLE 20 B COKE OVEN COKE INTRA-COMMUNITY EXCHANGES 1990
TABELLE STEINKOHLENKOKS ECHANGES INTRA-COMMUNAUTAIRES

20-Feb-91 ('000 TONNES)

DE-FROM-VON / EN-TO-A	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	RECEPTIONS RECEIPT/BEZUG
													0
BELGIQUE	0		100							300			400
	0		165		20					230			415
DANMARK		0											0
		0											20
DEUTSCHLAND	295		0					3		100			398
	200		0		90					100		10	400
ESPANA				0				7					7
			8	0	27			8				2	45
FRANCE	330		200		0			35		300			865
	320		413		0					230			1015
HELLAS						0		7					7
					0	0		10					10
IRELAND							0						0
	3		1				0			1		2	7
ITALIA	20		100					0					120
								0					0
LUXEMBOURG	155		1100						0				1255
	201		1110		1				0	7			1319
NEDERLAND	25		80							0			105
	100		100		100					0			300
PORTUGAL											0		0
				7	5						0		12
UNITED KINGDOM			20							50		0	70
												0	100
EXPEDITIONS													
DELIVERIES	825	0	1600	0	140	0	0	52	0	750	0	100 a	3467
LIEFERUNGEN	824	0	1797	7	243	0	0	18	0	568	0	14	3643

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

* Commission Forecasts a : break down by country not available b : break down by country not available for 52000 t

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TABLE 21

PRODUCERS' STOCKS OF HARD COAL AND COKE

(AT THE END OF THE YEAR)

20-Feb-91 ('000 tonnes)

	1989	1990 Provisional		1991 Forecasts	
	Actual	1000 TONNES	Number of calendar days covered	1000 TONNES	Number of calendar days covered
A. HARD COAL					
Belgium	97	110	39	(N.A.)	
Germany (1)	18132	17944	86	(N.A.)	
Spain	1777	1530	29	(N.A.)	
France	2381	3000	101	(N.A.)	
Ireland	20	20	209	(N.A.)	
Portugal	3	4	0	(N.A.)	
United Kingdom	10215	9300	37	(N.A.)	
COMMUNITY	32625	31908	58	32000*	
B. COKE					
Belgium	63	105	7	(N.A.)	
Germany (1)	3781	4290	88	(N.A.)	
Spain	96	(N.A.)	(N.A.)	(N.A.)	
France	293	(N.A.)	(N.A.)	(N.A.)	
Greece	13	(N.A.)	(N.A.)	(N.A.)	
Italy	407	(N.A.)	(N.A.)	(N.A.)	
Netherlands	40	(N.A.)	(N.A.)	(N.A.)	
Portugal	37	(N.A.)	(N.A.)	(N.A.)	
United Kingdom	385	(N.A.)	(N.A.)	(N.A.)	
COMMUNITY	5115	(N.A.)	(N.A.)		

N.A: not available

(1) Including the "nationale Kohlereserve".

* Forecasts of the Commission of the European Communities

TABLE 22

HARD COAL BALANCE SHEET FOR 1991

20-Feb-91 ('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
1. PRODUCTION (t=t)	550		72830	19000	10300	0	25	0	0	0	280	87500	190485
2. RECOVERIES	1350		670	140	760	0	0	0	0	0	0	2500	5420
3. ARRIVALS FROM ECSC COUNTRIES	1600	400	800	400	1500	0	573	550	42	1000	183	500	7548
4. IMPORTS FROM THIRD COUNTRIES	12310	10300	9900	8160	10800	1300	2760	20061	156	14600	3965	17500	111812
5. AVAILABILITIES (1+2+3+4)	15810	10700	84200	27700	23360	1300	3358	20611	198	15600	4428	108000	307717
6. INTERNAL DELIVERIES (TOTAL)	15235	11400	81500	27700	23350	1300	3320	20663	198	12750	4428	108500	310344
A. COLLIERY POWER STATIONS	70	0	1800	0	3600	0	0	0	0	0	0	0	5470
B. PUBLIC POWER STATIONS	5600	10500	46500	20000	4600	0	2070	10000	0	7800	3165	83000	193235
C. COKE OVENS	7100	0	21450	4100	8000	0	0	8213	0	4000	0	10500	63363
D. STEEL INDUSTRY	600	0	2300	300	1600	80	0	150	37	600	360	220 *	6247
(OF WHICH POWER STATIONS)	(-)	(-)	(-)	(-)	50	(-)	(-)	(-)	(-)	(-)	(-)	(-)	50
E. OTHER INDUSTRIES	1250	500	7700	2600	3500	1220	550	1200	160	200	901	7280 *	27061
(OF WHICH POWER STATIONS)	(-)	(-)	5000	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	5000
F. DOMESTIC SECTOR	600		700	400	1400	0	700	0	1	0	0	4300	8101
G. MISCELLANEOUS (TOTAL) OF	15	400	1050	300	650	0	0	1100	0	150	2	3200	6867
WHICH : 1. ISSUES TO WORKERS	(-)	(-)	100	150	20	(-)	(-)	(-)	(-)	(-)	(-)	700	970
2. PATENT FUEL	5	(-)	580	(-)	490	(-)	(-)	(-)	(-)	(-)	(-)	1400	2475
3. OWN CONSUMPTION	10	(-)	80	150	140	(-)	(-)	(-)	(-)	(-)	(-)	100	480
4. GASWORKS	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	0
5. RAILWAYS	(-)	(-)	90	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	90
6. OTHERS	(-)	400	200	(-)	(-)	(-)	(-)	1100	(-)	150	2	1000	2852
7. DELIVERIES TO ECSC	575	20 *	4000	0	462 *	0	20	0	0	2800	0	1000	8877
8. EXPORTS TO NON MEMBER COUNTRIES	0	80 *	100	0	88 *			0	0	50	0	400	718
9. TOTAL DELIVERIES (6+7+8)	15810	11500	85600	27700	23900	1300	3340	20663	198	15600	4428	109900	311062
10. MOVEMENTS OF PRODUCERS' AND IMPORTERS' STOCKS (5-9)	0	-800	-1400 a	0	-540	0	18	-52	0	0	0	-1900	-3345

* Commission Forecasts a : Including repurchases from the Nationale Kohlenreserve

TABLE 23

HARD COAL BALANCE SHEET FOR 1990

20-Feb-91

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
1. PRODUCTION (t=t)	1025	0	75725	18932	10800	0	35	0	0	0	280	92300	199097
2. RECOVERIES	1350	0	1820	146	650	0	0	0	0	0	0	3000	6966
3. ARRIVALS FROM ECSC COUNTRIES	1645	650	700	620	1700	0	573	901	43	1000	196	500	8528
4. IMPORTS FROM THIRD COUNTRIES	12145	9050	8800	9648	14950	1300	2765	20317	155	14600	4375	14500	112605
5. AVAILABILITIES (1+2+3+4)	16165	9700	87045	29346	28100	1300	3373	21218	198	15600	4851	110300	318668
6. INTERNAL DELIVERIES (TOTAL)	15555	9100	80230	29494	25980	1300	3290	21444	198	12750	4851	108400	312592
A. COLLIERY POWER STATIONS	110	0	1970	0	3700	0	0	0	0	0	0	0	5780
B. PUBLIC POWER STATIONS	5860	8200	43930	22367	6600	0	2010	10217	0	7800	3642	82000	192626
C. COKE OVENS	7200	0	22460	4048	8300	0	0	8783	0	4000	0	11000	65791
D. STEEL INDUSTRY	500	0	2000	330	1500	80	0	151	37	600	377	220 *	5795
(OF WHICH POWER STATIONS)	(-)	(-)	(-)	(-)	50	(-)	(-)	(-)	(-)	(-)	(-)	(-)	50
E. OTHER INDUSTRIES	1255	500	7700	2185	3700	1220	550	1223	160	200	830	7280 *	26803
(OF WHICH POWER STATIONS)	(-)	(-)	5000	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	5000
F. DOMESTIC SECTOR	605	0	600	394	1500	0	730	0	1	0	0	4500	8330
G. MISCELLANEOUS (TOTAL) OF	25	400	1570	170	680	0	0	1070	0	150	2	3400	7467
WHICH : 1. ISSUES TO WORKERS	(-)	(-)	110	80	20	(-)	(-)	(-)	(-)	(-)	(-)	800	1010
2. PATENT FUEL	5	(-)	650	(-)	500	(-)	(-)	(-)	(-)	(-)	(-)	1500	2655
3. OWN CONSUMPTION	20	(-)	90	90	160	(-)	(-)	(-)	(-)	(-)	(-)	100	460
4. GASWORKS	(-)	(-)	70	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	70
5. RAILWAYS	(-)	(-)	250	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	250
6. OTHERS	(-)	400	400	(-)	(-)	(-)	(-)	1070	(-)	150	2	1000	3022
7. DELIVERIES TO ECSC	605	20 *	4800	0	520 *	0	25	0	0	2800	0	1600	10370
8. EXPORTS TO NON MEMBER COUNTRIES	5	80 *	150	0	100 *			0	0	50	0	1000	1385
9. TOTAL DELIVERIES (6+7+8)	16165	9200	85380	29494	26600	1300	3315	21444	198	15600	4851	111000	313977
10. MOVEMENTS OF PRODUCERS' AND IMPORTERS' STOCKS (5-9)	0	500	1665 a	-148	1500	0	58	-226	0	0	0	-700	4691

* Commission Forecasts a : Including repurchases from the Nationale Kohlenreserve

TABLE 24

COKE BALANCE SHEET FOR 1991

20-Feb-91

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
1. PRODUCTION	5375	0	16900	3400	6500	0	0	5703	0	2900	270	7800	48848
2. RECEIPTS FROM ECSC COUNTRIES	415	20	400	45	900	10	5		1421	300	12	100	3628
3. IMPORTS FROM THIRD COUNTRIES	485	15	200	50	160	20	5	0	148	100	0	100	1283
4. AVAILABILITIES (1+2+3)	6275	35	17500	3495	7560	30	10	5703	1569	3300	282	8000	50131
5. INLAND DELIVERIES (TOTAL)	5375	35	15700	3495	7500	30	10	5556	1569	2500	282	7900	49952
A. STEEL INDUSTRY	5190		14000	3145	6700	20	8	5000	1568	2200	270	7000	45101
B. OTHER INDUSTRIES	145	30	900	350	650	10	2			100	11	200	2398
C. DOMESTIC SECTOR	10		220		30				1		0	500	761
D. MISCELLANEOUS OF WHICH :	30	5	580	0	120	0	0	556	0	200	1	200	1692
- ISSUES TO WORKERS	10	(-)	310	(-)	120	(-)	(-)	(-)	(-)	(-)	(-)	(-)	440
- OWN CONSUMPTION	(-)	(-)	5	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	5
- OTHERS	20	5	265	(-)	(-)	(-)	(-)	556	(-)	200	1	200	1247
6. DELIVERIES TO ECSC COUNTRIES	825		1200		100	0		52		750	0	100	3027
7. EXPORTS TO THIRD COUNTRIES	75		200		100	0		95		50	0	100	620
8. TOTAL DELIVERIES (5+6+7)	6275	35	17100	3495	7700	30	10	5703	1569	3300	282	8100	50572
9. STOCK MOVEMENT AT PRODUCTION AND IMPORTS (4-8)	0	0	400	0	-140	0	0	0	0	0	0	-100	-441

TABLE 25

COKE BALANCE SHEET FOR 1990

20-Feb-91

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
1. PRODUCTION	5450	0	17750	3428	6600	0	0	6356	0	2900	260	8000	50744
2. RECEIPTS FROM ECSC COUNTRIES	415	20	400	45	1015	10	7		1319	300	12	100	3643
3. IMPORTS FROM THIRD COUNTRIES	485	15	200	63	155	20	4	43	132	100	0	100	1317
4. AVAILABILITIES (1+2+3)	6350	35	18350	3536	7770	30	11	6399	1451	3300	272	8200	52061
5. INLAND DELIVERIES (TOTAL)	5450	35	16030	3521	7740	30	11	6407	1451	2500	272	7900	51347
A. STEEL INDUSTRY	5265		14200	3165	6900	20	7	5900	1450	2200	260	7000	46367
B. OTHER INDUSTRIES	145	30	950	356	680	10	4			100	11	200	2486
C. DOMESTIC SECTOR	10		250		30				1			500	791
D. MISCELLANEOUS OF WHICH :	30	5	630	0	130	0	0	507	0	200	1	200	1703
- ISSUES TO WORKERS	10	(-)	350	(-)	130	(-)	(-)	(-)	(-)	(-)	(-)	(-)	490
- OWN CONSUMPTION	(-)	(-)	5	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	(-)	5
- OTHERS	20	5	275	(-)	(-)	(-)	(-)	507	(-)	200	1	200	1208
6. DELIVERIES TO ECSC COUNTRIES	825	0	1600		140	0	0	52		750		100	3467
7. EXPORTS TO THIRD COUNTRIES	75	0	300		140	0	0	149		50		100	814
8. TOTAL DELIVERIES (5+6+7)	6350	35	18040	3521	8020	30	11	6608	1451	3300	272	8100	52161
9. STOCK MOVEMENT AT PRODUCTION AND IMPORTS (4-8)	0	0	310	15	-250	0	0	-209	0	0	0	100	-100

TABLE 26

LIGNITE AND PEAT BALANCE SHEET FOR 1991

20-Feb-91

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12
A. RAW PRODUCT													
- AVAILABILITIES :	0	0	110500	15400	2160	60000	8000	1500	0	0	0	0	197560
PRODUCTION		0	110500	15400	2100	60000	8000	1500		0	0	0	197500
IMPORTS		0	0	0	60	0	0	0		0	0	0	60
- UTILIZATION :	0	0	110450	15400	2138	60000	7015	1500	0	0	0	0	196503
BRIQUETTING PLANTS		0	15500		0	400	1300			0	0	0	17200
POWER STATIONS		0	93400	15400	1900	58100	3500	1500		0		0	173800
OTHERS			1550	0	238	1500	2215	0			0		5503
B. BRIQUETTES													
- AVAILABILITIES :	275	0	5900	400	60	150	40	0	13	0	0	0	6838
PRODUCTION	0	0	5880	0	0	0	0	0	0	0	0	0	5880
ARRIVAL FROM ECSC COUNTRIES	275		20		60	150	40		13				558
IMPORTS FROM NON-MEMBER COUNTRIES	0	0	0	400	0	0	0	0	0	0	0	0	400
- UTILIZATION :	275	0	5900	400	60	0	40	0	13	0	0	0	6688
POWER STATIONS	0		750	400	0	0	0	0	0		0		1150
INDUSTRY	250		3100	0	0	0		0	3		0		3353
DOMESTIC	25		1300		60	0	40		10		0		1435
SHIPMENTS TO OTHER ECSC COUNTRIES	0		630			0	0		0				630
EXPORTS TO NON-MEMBER													0
COUNTRIES	0		120				0		0				120
													0

TABLE 27

LIGNITE AND PEAT BALANCE SHEET FOR 1990

20-Feb-91

('000 TONNES)

	BELGIQUE	DANMARK	DEUTSCH-LAND	ESPANA	FRANCE	HELLAS	IRELAND	ITALIA	LUXEM-BOURG	NEDER-LAND	PORTUGAL	UNITED KINGDOM	EUR - 12 (*)
A. RAW PRODUCT													0
- AVAILABILITIES :	0	0	353313	15411	2280	55500	7623	1600	0	0	0	0	435727
PRODUCTION		0	353313 a	15411	2200	55500	7623	1600		0	0	0	435647
IMPORTS		0	0	0	80	0	0	0		0	0	0	80
													0
- UTILIZATION :	0	0	353313	15488	2138	55500	6980	1600	0	0	0	0	435019
BRIQUETTING PLANTS		0	113165 b		0	400	1300			0	0	0	114865
POWER STATIONS		0	189099 c	15488	1900	53600	3500	1600		0	0	0	265187
OTHERS			51049 d	0	238	1500	2180	0					54967
													0
B. BRIQUETTES													0
- AVAILABILITIES :	275	5	6060	442	65	150	30	0	13	0	0	0	7040
PRODUCTION	0	0	6040	0	0	0	0	0	0	0	0	0	6040
ARRIVAL FROM ECSC COUNTRIES	265				60	150	30		13				518
IMPORTS FROM NON-MEMBER													0
COUNTRIES	10	5	20	442	5	0	0	0	0	0	0	0	482
													0
- UTILIZATION :	275	0	6060	442	65	0	30	0	13	0	0	0	6885
POWER STATIONS	0		775	442	0	0	0	0	0		0		1217
INDUSTRY	250		2985	0	0	0		0	3		0		3238
DOMESTIC	25		1515		65	0	30		10				1645
SHIPMENTS TO OTHER ECSC													0
COUNTRIES	0		665			0	0		0				665
EXPORTS TO NON-MEMBER													0
COUNTRIES	0		120				0		0				120
													0

a: including 243748000 t from DDR b: including 98715000 t from DDR c: including 95464000 t from DDR d: including 49569000 t from DDR