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I

(Information)

COMMISSION

THE COMMUNITY COAL MARKET IN 1978 AND FORECASTS FOR 1979

In accordance with Council Directives 71/354/EEC and 76/770/EEC, tce (tonnes of coal equivalent) have been abolished as an official unit of calorific value in the European Communities and have been replaced by joules (unit of energy). Accordingly, this new unit appears for the first time in this report.

However, as tce is familiar and continues to be used in documents issued by the OECD and the IEA (International Energy Agency), it has not been completely dropped from the text in this report. However, it no longer represents an authoritative statistical measure.

I. SUMMARY SURVEY

1. The coal market in 1978

In 1978, the estimated inland demand for energy reached 39 218 petajoules (937 million tonnes of oil equivalent), slightly exceeding the 1973 level of consumption and representing a growth of 2.4% on 1977. This increase in demand, which contrasted with the virtual stagnation of the previous year, was a reflection of the somewhat higher rate of economic growth, the increase in GDP in 1978 being estimated at almost 3%. The GDP/energy growth relationship was significantly different from that of 1977 (GDP + 2.4%/energy - 0.08%), but broadly in line with the objective established for the year 1985 for the Community (1.0 : 0.8).

Coal consumption in the Community (Table 3) in 1978 was about 287 million tonnes, the same as in 1977. This was the result of higher demand for electricity generation approximately balanced by lower requirements for coke production. However, in terms of ordinary energy use, i.e. leaving aside coke production and various other uses in the steel industry, coal consumption was about 7 million tonnes or 3.7% higher in 1978 than the year before.

1978 has witnessed some recovery in steel production from the previous year's lowest level in the current cycle,

but this rise in output of some 6.5 million tonnes to 132.6 million tonnes represents only about 20% of the slide from its peak in 1974. The impact of this recovery on the coke market was a mere 1.2 million tonnes extra consumption by the iron and steel industry, or about 8% of the ground lost since 1974, due principally to the fact that pig-iron production rose by only 2.8 million tonnes.

Coal-burn in power stations at around 159 million tonnes in 1978 represents a rise of close on 5.1% over the previous year, but oil consumption for electricity generation rose by about 10%. Furthermore, there persists a heavy imbalance in electricity coal-burn as between Member States, in that nearly 80% of all hard coal for electricity generation was used in the United Kingdom and in Germany, and an even higher percentage if lignite is taken into account.

The use of coal by general industry in 1978 was about the same as in 1977 while, for the first time in many years, coal consumption for domestic heating has maintained the previous year's level.

At 238 million tonnes (216 mtce), Community coal production in 1978 was marginally lower than the year

before. Technically feasible higher productivity and, had market conditions made this viable, fuller recourse to underused German capacity would have enabled the Community's coal industry to produce somewhere between an extra 10 million and 20 million tonnes, making a total in the region of 250 to 260 million tonnes (227 to 237 mtce).

To reach the Community target level of a production level of about 270 million tonnes (250 mtce) by 1985, very large further investment in the coal industry is thus essential, all the more as there are pressures to phase out highly uneconomic pits requiring heavy subsidies. Such investment requires secure markets for the resultant output.

The financial position of the coal industries in all four Member States deteriorated in 1978. The reason was rising costs of production in a world energy market characterized by fairly stable prices in depreciating US dollars, resulting in falling prices in terms of most Community currencies.

The list prices of most of the Community's coal output were raised by 10 to 15% in the course of 1978 to recover some of the cost increases. However, the so-called indicative price for third country coking coal calculated by the Commission has retained its stability at around \$62 since 1975, whereas the average landed price for third country steam coal has been edging up from around \$30 at the beginning of 1977 to about \$34 by the end of 1978. In most Community currencies, this means a progressive drop in coking coal prices and approximate stability in those for steam coal, while in real terms there has been a drop in both.

Intra-Community exchanges in coal at 19 million tonnes in 1978 were some 3.3 million tonnes above the previous year's level, due almost entirely to increased German sales, a substantial proportion of them for use in power stations. On the other hand, there has been virtually no change in intra-Community coke sales at around 5 million tonnes.

Likewise, coal imports from third countries, stabilized in the 43 to 46 million tonnes region in the past few years, have been of the same order in 1978. Poland remains the largest external supplier to the Community, but, due partly to strikes in the US, that country's place as the second largest supplier has been taken over by South Africa, although some shift in this direction would, in any event have occurred due to the attractive prices of South African power station coal.

On the other hand, coal and coke exports to third countries in 1978 were about 50% above those of the previous year, most of the business being German. The situation in the US provided the opening for raising coke exports to 4.5 million tonnes, a high proportion of these being shipped there, while exports of 3.2 million tonnes of coal were shipped to a variety of destinations. However, in view of world market prices, most of these exports required price alignments unattractive to the producers.

The combination of stable coal consumption inside the Community and a rise in exports with marginally lower production and stable imports has allowed a reduction of excess stocks of coal and coke which have been a problem to the German coal industry for a number of years. On the other hand, most differences in end of year stocks of coal at power stations between 1977 and 1978 have had little influence on the number of days' supplies held and reflect deliberate policies of the respective generating concerns.

In quantitative terms, the Community coal market showed a better balance between supply and demand towards the end of 1978 than it has done for some years. However, this was achieved at the price of higher subsidies of various types for the benefit of the coal industries of all Member States.

2. The coal market outlook for 1979

The upturn in the economy experienced last year is likely to persist and probably accelerate in 1979, particularly in the field of demand for capital goods.

The effect on steel industry output will probably be confined to a few percentage points, but the proportion of pig-iron used will be slightly higher. As a result, coke consumption is expected to show a rise of around 3%.

In the electricity sector, coal consumption is forecast to grow by some 3 to 5%, accompanied by a larger percentage in oil-burn, a disproportion likely to widen in subsequent years. The reasons are the age structure of the industry, placing much existing coal-fired plant low in the networks' merit order, and the types of installation due to be commissioned.

Thus in 1979, between 1 700 MW and 2 700 MW of nuclear plant are expected to become operational, plus some 9 500 MW of conventional plant. Of this, only about 3 500 MW is likely to be capable of being

coal-fired, while of some further 11 000 MW of conventional plant due to be commissioned in 1980 and 1981, only about 2 000 MW will be able to burn coal.

No further substantial rise in demand for general industry can be expected in 1979. Most reconversions to solid fuel-firing have been completed and few new industrial coal-fired boilers are due to come into operation.

In the domestic heating field, if the unusually inclement weather at the start of 1979 is followed by other periods giving rise to above-average demand for fuel, the regression in coal sales in this market may be halted for yet another year. In that case, they would again be around 20 million tonnes as in the two previous years, otherwise they are likely to fall by about 10%.

Coal production in 1979 is forecast to be around 240 million tonnes. Some increases in German, British and Belgian production are likely to more than balance planned reductions in French output.

Information available at the time of going to press suggests unchanged levels of intra-Community sales of

coal and coke and an increase of some 10% in coal imports from outside the Community in 1979. However, there is a possibility of a degree of switching to Community coal if associated price problems can be resolved.

The stock position is unlikely to change greatly, but a further small run-down in German stocks is probable. This will depend to a considerable extent on the import substitution mentioned in the previous paragraph and on the maintenance of the higher level of coal and coke exports to third countries achieved last year.

The general picture of the coal market in 1979 is thus one of little change apart from a very slight rise in internal consumption. However, against the background of economic growth, likely to accelerate in 1979, there may, nevertheless, be a drop in the part of the Community's energy requirements covered by coal. A number of Commission proposals to promote greater use of coal and to improve the situation for the Community's coal industry have been submitted to the Council but had not been adopted by the time of going to press. The importance of coal in future energy supplies urgently calls for progress towards a Community coal policy.

II. GENERAL ECONOMIC SITUATION AND OUTLOOK

(Table 2)

There has been a slight economic revival in the Community in the course of 1978.

Private consumption has held up throughout the year and fixed investment showed an upward trend from the spring onwards. Industrial production has developed at a moderate pace, while activity in the construction sector has shown signs of an upturn only in some countries. For the whole year, the Community's gross domestic product is estimated to have risen by 2.8%.

Although the labour market has tended towards stabilization from the second quarter onwards, the percentage of unemployed among the working population continued to rise in 1978, albeit at a slower rate than the previous year. Whereas unemployment rose at an annual average from 4.9% in 1976 to 5.3% in 1977, it amounted to 5.5% in 1978.

Price developments and the external balance of payments both improved in 1978. Inflation has continued to

moderate and divergencies between Member States have decreased, though they remain excessive. Improvements in the terms of trade have resulted in substantial increases in current balance of payments surpluses of the Community in spite of fairly rapid rises in the volume of imports.

The upturn in the economy is expected to persist in 1979. Due to concerted action within the Community, internal demand should develop slightly more strongly than in 1978, particularly in the field of capital goods. Overall, the gross domestic product in the Community might increase by some 3.5% in real terms, and this improvement in the economic situation should put a brake on the growth of unemployment in spite of a further rise in the working population.

However, notwithstanding these indications of continuing improvements, the international situation casts shadows of uncertainty over the economic outlook.

III. COAL DEMAND BY SECTORS

1. Steel industry

(Tables 4 to 7)

In 1975, the steel industry suffered its most severe world-wide recession in 30 years. In the Community, this was reflected in a drop from a production level of nearly 156 million tonnes in 1974 to only just over 125 million tonnes in 1975, followed by about 126 million tonnes in 1977.

Compared to this drop, recovery to about 132.5 million tonnes in 1978 has been very modest and irregular in trend and has shown considerable differences as between Member States. In such a situation, variations in the proportion of pig-iron used in the manufacture of steel and in relative levels of activity as between coastal and inland steelworks tend to exert more influence on demand for Community coking coal than do fluctuations in total steel production.

Thus, in the cases of Italy and the United Kingdom, increased or virtually unchanged steel output as between 1977 and 1978 has, nevertheless, been accompanied by a drop in pig-iron production of about 0.7% and 6.5% respectively. In all other Member States, there have been rises both in steel and pig-iron output in 1978.

The fact that of the extra steel output of 6.5 million tonnes in 1978, about one-third was produced by the German industry – through geography and by tradition a user of Community coking coal – has favoured Community coal, although a strike in the German steel industry at the end of 1978 has involved a loss in coke sales of some 0.5 million tonnes. A closely similar absolute rise in output by the Belgian and Luxembourg steel industry has benefited Community coal and coke sales to the extent of around 80%, the remainder having been covered by imports from third countries.

Forecasts of steel production in 1979 are 135 to 136 million tonnes and of pig-iron production 93 to 94 million tonnes. The former represents an increase of 2.2% over 1978 and the latter of 3.3%, but if the United Kingdom is excluded, the respective percentages are 1.5% and 2.2%. The disproportionate increase in pig-iron production in the United Kingdom in 1979 will be due to a large new blast furnace coming into operation in the north of England.

Total coke consumption in the steel industry in the Community in 1979 is likely to be approximately 54

million tonnes, a rise of around 3% over last year. The recent average drop in the coke rate is expected to continue and, for the first time, is likely to fall below 500.

2. Power stations

(Tables 8 A, B, C, D)

In view of the replacement of tce (tonnes of coal equivalent) as a unit of calorific value in the European Community by joules (units of energy), the tables relating to the electricity sector have been slightly rearranged in this report. Table 8 B, giving fuel consumption by conventional thermal power stations and coverage of requirements in %, now shows the former in petajoules ($j \times 10^{15}$) instead of in tce, but to give consumption of solid fuels also in familiar terms, a new Table 8 C has been added which shows this in tonnes ($t=t$). However, it should be noted that these two tables are not strictly comparable as the figures for the latter are based on more recent estimates than in the former and because the relationship between joules and tonnes varies with coal quality. The former Table 8 C, giving details of coal supplies to public power plants by origin has now been renumbered Table 8 D.

Electricity production in the Community in 1978 was about 4.6% above that of 1977, compared to an increase of 3.3% the year before. The rise has been particularly marked in France, Belgium and Ireland all with growth rates of 7.5% or over; by contrast, growth in the United Kingdom was under 2%. Such variations, whilst not exclusively a direct reflection of different economic growth rates, are nevertheless indicative but the availability of attractively priced alternative fuels, such as gas for space heating in competition with electricity in the United Kingdom also has some bearing on electricity growth rates.

In spite of ample water supplies for electricity generation during the earlier part of the year and newly commissioned nuclear power plants totalling some 3 000 MW, the increased demand for electricity is reflected in higher consumption of conventional fuels in seven out of the nine Member States. Only Denmark shows an appreciable drop, due to larger purchases of electricity from her neighbours.

Although 1978 has witnessed a rise in coal consumption for electricity generation of slightly over 5% and in

lignite consumption of slightly under 2% compared to 1977, oil consumption for electricity generation in the Community has risen at a faster rate, namely by about 10%. The percentage increases in oil-burn has been particularly steep in Holland with some 75%, where there has been some reduction in natural gas-burn, followed by Belgium and Italy, each with a rise of some 15%, and France with about 12%. Denmark was the only country to reduce its oil-burn in 1978. The principal reasons for the increases in oil-burn were inadequate coal-firing capacity, or installations so old and inefficient as to place them very low in the electricity producers' merit order, not compensated by sufficient nuclear generation to meet the required increases in electricity production.

Coal consumption for electricity generation in the Community in 1978 amounted to about 159 million tonnes compared to approximately 151 million tonnes in 1977. A rise of about 3.6 million tonnes registered in Germany was the largest in the Community, followed by France, the United Kingdom and Denmark with increases of 2 million tonnes, 1 million tonnes and 0.6 million tonnes respectively. However, these increases have done little to narrow the enormous differences in coal consumption for electricity generation between various Member States: nearly 80% of all hard coal for electricity generation was used in the United Kingdom and Germany, or an even higher percentage if lignite is taken into account.

Table 8 D shows coal supplied to public power plants – this category excludes power stations owned by the coal industry and auto-producers – and presents a pattern which can differ from that of coal consumption. However, the differences have been slight in 1978 and have led to no significant changes in electricity producers' stock positions in relation to their requirements.

Forecasts for 1979 are for a further rise in power station coal-burn to somewhere in the 165 million tonnes region, with other solid fuel consumption remaining at about the 1978 level. However, this will again be accompanied by a larger percentage rise in oil-burn. The latter is expected to be particularly substantial in France, Ireland and Italy, while a considerable increase in the use of natural gas is forecast in Belgium. As in 1978, the reason for this continuing trend is inadequate coal-fired and nuclear generating capacity.

The background to these forecasts are the expected commissioning of between 1 700 MW and 2 700 MW of new nuclear plant and some 9 500 MW of new conventional plant. Of the latter, only some 3 500 MW is expected to have a coal-burning capability.

Looking further ahead, present indications are that in 1980, a further 6 000 MW of new conventional plant

will be commissioned and some 4 600 MW in 1981. Of these only some 1 300 MW and 700 MW respectively will be capable of burning coal.

3. Various industries

(Table 9)

The steady rise in coal and coke consumption by general industry in the Community as a whole during the past few years has continued in 1978 only in Belgium. In this country, coal consumption has risen quite sharply, with little change in regard to coke use.

Elsewhere, the market has been either stagnant or has slightly contracted, with coal and coke showing different trends. Thus, in France, a slight increase in the use of coal has been accompanied by a larger drop in coke consumption, with the result that the country's overall figures in Table 9 are a little higher for 1978 than for the year before. In Germany, on the other hand, there has been a slight contraction of the general industrial market for both coal and coke, accompanied, however, by some reconversions from oil- to lignite-firing in enterprises geographically favourably placed for making use of this very economical fuel.

In so amorphous a market, it is extremely difficult to collect sufficiently accurate information to provide forecasts. With most reconversions to solid fuel-firing completed and little in the way of new industrial coal-fired boilers due to come into operation next year, the likelihood is that, in 1979, coke and coal consumption by general industry will again be of the order of 18 million tonnes, about three-quarters represented by coal and one-quarter by coke.

4. Domestic sector

(Tables 10 A and 10 B)

In view of the abolition of the unifying of tce (tonnes of coal equivalent), Table 10 has been subdivided into Table 10 A showing solid fuels of high calorific value and Table 10 B those of low calorific value. Both are now in tonnes, but heat values of the fuels in the two tables are not comparable.

Contrary to original forecasts, prolonged periods of cold weather during the first half of the year have caused total consumption of coal, patent fuels and coke in 1978 to have remained virtually the same as in 1977, although there has been a shrinkage in the market for lignite briquettes.

However, there are not grounds for concluding that the long-term contraction of the market for domestic solid fuels has been halted, all the more as it is subject also to difficulties on the supply side. These are partly the result of mechanized coal cutting, which produced pieces of smaller size than desired by householders for many types of traditional appliances, and partly a matter of very high costs of production of anthracite.

With 50 % of all domestic solid fuel consumption in the Community, the United Kingdom represents by far the largest market, followed by Germany and then France, the former occupying second place due to continuing substantial use of lignite briquettes. In both these countries, issues to present or retired workers of the coal

and associated industries represent a significant proportion of the market; the same applies in Belgium which has, in fact, the highest consumption of solid fuels in relation to its population after the United Kingdom.

In the absence of unusual climatic conditions, the long-term downward trend in the use of domestic solid fuels is expected to continue in 1979 with a drop of about 10%. The sole exception is likely to be Ireland, where this market has been stable for a number of years. However, if the unusually inclement weather at the start of 1979 is followed by other periods giving rise to above-average demand for space heating, the contraction of coal sales in this market may be halted for yet another year.

IV. COMMUNITY COAL PRODUCTION

1. Production statistics

(a) *Quantitative analysis of output*

(Tables 11 and 12)

Community coal production in 1978 was 238.1 million tonnes (216 mtce) a drop of some 2.3 million tonnes (2.1 mtce) or about 1% below 1977.

As in the previous two reports, production forecasts made at the beginning of the year proved to be too high, though this time by a smaller amount. The principal source of these overestimates lay in excessive forecasts for German output, made in the hope of greater utilization of productive capacity in spite of adverse market conditions.

The only other Member State in which there was a proportionately comparable shortfall in actual production compared to original forecasts was Belgium. The prime reason for this were unexpected geological difficulties encountered in two pits in the Campine coalfield.

As a result of the abovementioned factors, German coal output in 1978 was about 1 million tonnes below that of 1977, and that of Belgium about 0.5 million tonnes lower. French production was 1.6 million tonnes below the previous year's level in accordance with the government's plan, while production in the United Kingdom in 1978 was about 1 million tonnes above the 1977 level, due to the introduction of a new system of productivity bonuses during the early months of last year.

Indications are that coal output in 1979 will be of the order of 240 million tonnes. This is likely to be the result of increases in output in Germany, the United Kingdom and in Belgium, partly offset by further planned reductions in France.

(b) *Manpower and productivity*

(Tables 13 and 14)

In showing a reduction of 8 300 men or 2.2% in the Community as a whole, the trend in underground manpower in 1978 was very similar to that of the year before.

However, this global figure results from different developments in Belgium and Germany on the one hand, and in France and the United Kingdom on the other. Whereas in the first two of these countries, retirement in 1978 was on a lower scale than in the year before, the French coal industry's loss of underground manpower rose from 2 200 men in 1977 to 3 200 men in 1978 and that of the British industry from 1 000 to 3 700 men.

Around the middle of 1977, some 6 500 underground workers aged 62 and over left the British coal industry under attractive new pension rules, but these were replaced by new recruits to the extent that by the end of the year, total manpower was down by only about 2 000, thus making for a drop in average manpower of about 1 000 for the year as a whole. As a result, a further drop of 1 000 in average manpower last year compared to 1977 is a matter of statistical backlog, but this still leaves a true reduction in underground manpower of close on 3 000, very similar to that in France.

Although in absolute terms, the losses in underground manpower in France and the United Kingdom were similar, they represent a very much higher percentage of the total in the former. The rundown in French manpower is part of the government's plan of pit closures and reduction of output formulated before the events in the world oil market in 1973/74 and not substantially modified since.

The basis of Table 14 showing productivity has been changed from output per manshift underground to output per manhour underground. This provides comparability between figures for the different Member States.

Due to many incalculable factors, productivity forecasts, at least over the short-term, are particularly prone to errors, and performance in 1978 has, indeed differed substantially from expectations.

Productivity in Belgium dropped instead of increasing, due to geological problems encountered in two large coal mines in the Campine coalfield representing a substantial proportion of the country's total productive capacity.

In Germany, the rise in productivity was about three-quarters of that originally forecast, the result of changes in production planning in the light of adverse market conditions, while in France, the rise in productivity was about two-thirds of that initially expected.

Only in the United Kingdom was there a steeper rise in underground productivity than forecast in last year's report, due to the fact that when this went to press, negotiations with the mine-workers' unions for a new productivity bonus scheme had not yet been concluded. These incentives have resulted in a rise in underground productivity of 3% averaged over the whole year, and a somewhat higher figure since the bonus scheme came into operation at various times in different coalfields. However, an average spread over so large a production area as that of Britain masks very large differences in productivity between different coal mines.

There are no reasons to expect any significant changes in the past year's trend for productivity in 1979, except that in the case of Belgium, a return to an upward tendency is expected.

2. Financial developments

(a) *Production costs and proceeds*

(Table 15)

Mounting costs of mining equipment and materials and diverging developments in wages and productivity have

led to faster rising production costs in the Community coal industry in 1978 than in the previous year. Various measures taken by the industry to restrain cost escalation have had only limited results, in some instances due to the fact that modernization of workings involves expenditure stretching over a number of years, combined with underused productive capacity increasing fixed costs per tonne of production.

The weakness in the world energy market throughout 1978, compounded by the fall in the value of the dollar in relation to the currencies of the coal producing Member States, has not allowed the coal industry to raise its prices in line with rising production costs. Only modest price increases proved practicable in the United Kingdom, in France and in Germany and none in Belgium.

The widening gap between costs and proceeds has led the coal producers into a deteriorating financial situation. This has been particularly marked in Germany, where losses per tonne in 1978 were about double those of the year before, but even in the United Kingdom, losses have been rising from quarter to quarter. The following table gives an indication of the extent to which proceeds have covered costs in the four coal producing Member States in 1978:

United Kingdom	90%
Germany	85%
France	65%
Belgium	55%

(b) *Financial intervention by Member States*

(Table 16)

All coal producers in the Community required government subsidies to cover certain outgoings, costs or losses in 1978 to a greater extent than the previous year. The figures in Table 16 give an indication of the subsidies required by the coal industries in the various Member States. However, the figures for the United Kingdom are incomplete as, in the autumn of 1978, the British Government committed itself to additional grants, the financial effects of which could not be assessed and incorporated in the table by the time of going to press.

Comparing coal industry subsidies as between the Member States, account must be taken of the fact that payments by governments are only one of several instruments of financial support. Others are excise taxes on competing fuels, restrictions on imports of cheaper coal from outside the Community, and measures forcing

final consumers of energy to subsidize coal-burn through manipulation of electricity tariffs.

(b) *Pit closures*

(Table 18)

As forecast in last year's report, pit closures in 1978 were on a bigger scale than they had been for some time.

3. Developments in productive capacity

(a) *Investments in coal production and preparation*

(Table 17)

The policy of heavy investment in the Community coal industry, launched in 1974 has continued to be pursued in spite of falling production. Although average annual growth rates for capital expenditure in the Community's coal industry have been slackening, the following figures show that they remained ahead of inflation up to the end of 1977:

1974/73	+ 22 %
1975/74	+ 58 %
1976/75	+ 40 %
1977/76	+ 16 %

Figures for 1978 were not available at the time of going to press, but indications are that they were of the same order of magnitude as the year before, and a similar level is expected for 1979. Taking account of inflation, such financial stabilization implies a contraction of investment in real terms.

Current estimates are that, setting pit closures against investment in progress or approved by undertakings, production potential will have decreased by some 5 million tonnes from 1977 to 1981.

These were two large pits in the Ruhr area of Germany and a substantial pit in the north of France, the former with a total output of 3.2 million tonnes the previous year and the latter with close on 0.7 million tonnes. A further 11 relatively small pits ceased production, one in central France, one in the south of Belgium and nine in the United Kingdom. In all 14 pits were thus involved, representing production of some 5.5 million tonnes in 1977.

There are large-scale closure plans for 1979 in France, involving some 1.6 million tonnes capacity or about 8 % of last year's production although output that year is expected to be affected only to the extent of 0.5 million tonnes. For the first time in several years, the closures include a substantial pit in the Lorraine coalfield in addition to one pit each in the northern and central coalfields. These closures represent a continuation of the programme formulated by the French Government and coal industry prior to 1973 and not substantially revised in the light of subsequent developments in the energy market.

Elsewhere, the only closures definitely expected in 1979 are of a pit in the Ruhr which produced about 0.7 million tonnes last year, plus one in the United Kingdom and the other in the south of Belgium, both of these relatively small. Last year's output of all pits in the Community due for closure in 1979 was around 2.7 million tonnes.

V. COAL PRICES

An improved reporting system by the Member States to the Commission has made it possible to provide fuller details than hitherto of price movements for steam coal for electricity generation imported from third countries. Accordingly, the traditional lists of pithead prices for Community coal, formerly Tables 19 and 20, have been renumbered Tables 19 A and 19 B, while Table 20 now shows price developments for imported steam coal.

In view of the importance of fluctuations in rates of exchange, the following list showing the movement of the US dollar in relation to the Community currencies will be helpful:

1 US dollar =	Bfrs	Dkr	DM	FF	Lit	Fl	£
2. 1. 1978	32.75	5.775	2.1025	4.6525	870.25	2.2635	0.5148
3. 7. 1978	32.60	5.634	2.0682	4.5925	861.50	2.2255	0.5367
2. 1. 1979	28.545	5.0225	1.8084	4.143	823.00	1.9525	0.4885

1. Coal price developments

(Tables 19 A and 19 B)

Tables 19 A and 19 B show listed pithead prices of different types of coal for certain representative coalfields, the former in national currencies and the latter in US dollars.

On 1 January 1978, the German coal industry raised its prices in general by about 7 to 8% and by a few very slight further increases in the course of the year, followed by an increase of some 2% on 1 January 1979. Over the same period, price rises in the United Kingdom have been of a similar order of magnitude, namely of a total of around 10 to 15%, those for industrial coals having been raised in the spring and for the domestic market in the autumn.

On the other hand, developments in the two other coal producing Member States have followed a different course. In the case of France, they have been raised by a total of from 12 to 20% depending on type but excluding coking coal and blast furnace coke. In Belgium, prices both for coking and power station coal were reduced by 9 to 12% in view of world market conditions.

There has been a tendency towards widening margins between the highest-priced coal produced in some areas of the Community compared to the lowest-priced of similar type produced in the United Kingdom.

2. Coking coal

The average price cif ARA for third country coking coal, the so-called indicative price calculated by the Commission, has remained extraordinarily stable since 1975 at around \$62. However, bearing in mind inflation, the world market price for coking coal has steadily fallen in real terms and, in addition, in terms of most Community currencies, due to their appreciation in relation to the dollar.

Accordingly, fluctuations in selling prices of Community coking coals and coke have been a function of movements in rates of exchange between the producer countries' currency and the US dollar. These are given for 1978 in the introductory section above.

3. Steam coal

Unlike for coking coal, there is not indicative third country price for steam coal on which Community producers traditionally align their own.

In the case of Germany, a surcharge passed to electricity consumers allows coal producers to charge prices fully covering their costs, while in Belgium and France, the system is one of alignment on competing fuels and government subsidies to the coal industry. On the other hand, a substantial proportion of United Kingdom coal production for power stations has remained competitive with other fuels in 1978, but its competitiveness has suffered progressive erosion in the course of the year, leading to the need for substantial government subsidies in certain areas by the autumn.

Prices of steam coal for electricity generation imported from third countries have been slowly rising in terms of US dollars from an average of about \$30 per tonne at the beginning of 1977 to about \$34 per tonne towards the end of 1978. However, as can be seen from the upper part of Table 20, average prices expressed in EUA/Tj have shown no steady tendency during this period and have scarcely moved over two years. In real terms, this means a substantial fall in prices.

4. Outlook for 1979

Developments in world market steam coal prices in 1979 are unusually difficult to predict because of the uncertain situation in the oil market. If crude oil exports from Iran are quickly restored, market prices for high sulphur residual fuel oil are likely to remain relatively weak.

Should Iran's exports not be resumed, however, the strong upward movement since October 1978 in the prices of distillate products and low sulphur fuel oil could well extend to high sulphur residue. In that case, the changed market conditions might be reflected in world steam coal prices.

Failing this, there are no grounds for expecting any substantial price movements in the world steam and coking coal markets apart from some moderate rises. In that case, the problem of increasing costs forcing the Community coal industry to raise prices while market conditions dictate stability will confront it with problems for which there are no satisfactory answers.

VI. COKE

1. Development of coking capacity

(Table 21)

Having contracted by 3.5 million tonnes from 1976 to 1977, the Community's coking capacity was reduced by a further 5.1 million tonnes from 1977 to 1978. Cokery closures were spread over all four coal producing Member States, about 75% owned by the coal industry, including small installations in the United Kingdom producing domestic smokeless fuel.

Prospects for 1979 are a net increase of about 1 million tonnes in the Community's coking capacity, due principally to the opening of two cokeries belonging to the British Steel Corporation, one in the north of England and the other an extension in South Wales, both originally planned for 1978. Their total production is expected to be around 0.9 million tonnes during the first year and is planned to rise to about 1.2 million tonnes in 1980.

In accordance with current plans, coking capacity in the Community, taking account both of closures and of new coke-ovens, will have been reduced by around 4 million tonnes between 1977 and 1980, and by a further 3 million tonnes between 1980 and 1985. This development is contingent on no further deterioration in the current very unsatisfactory economics of coke production due to average capacity utilization of the order of 75%, but with some coke-ovens working at only 65 to 70% capacity.

2. Coke production and coal supplies to cokeries

(Tables 22 and 23)

In 1978, coke-oven coke production has continued its slow downward adjustment to the market conditions of the past few years. Although consumption during this period has been as much as 20 million tonnes a year below its peak in 1974, coke production fell very slowly. The excess, produced mainly by the coke-ovens of the German coal industry, has been added to stocks, causing these to reach nearly 16 million tonnes early in 1978.

This situation has meanwhile been reversed through reduced production, stabilized sales within the Community and a rise in exports to third countries of some 35% from about 4.4 to 6.1 million tonnes. The latter have been helped by labour and transport problems in the US coal industry in 1978, but the age structure of US cokeries and environmental problems arising from coke production might provide a permanently enlarged US market.

In line with expectations of a further moderate upturn in the economy, internal coke consumption in the Community in 1979 will probably rise by somewhere in the 2 to 3% region. If exports to third countries should fall back to around their 1977 level, total demand of about 69 million tonnes in 1979 would be virtually unchanged from last year, but it could be somewhat higher if some of the export gains can be maintained. Production is expected to be adjusted to continue last year's slight reduction in coke stocks held by the coal industry.

VII. TRADE IN COAL AND COKE

1. Intra-Community trade

(Tables 24 and 25)

In 1978, Germany has continued to be by far the largest supplier of coal and coke to other Community countries, recovering some of the ground lost in recent years.

During the period of peak activity in the steel industry in 1974, coal deliveries from Germany to other Community countries amounted to 16.5 million tonnes plus 8 million tonnes of coke, making a total of 26.8 million

tonnes with coke reckoned at its coal equivalent. By 1977, coal deliveries had dropped to 12.6 million tonnes and coke deliveries to slightly below 4 million tonnes, a total of under 18 million tonnes, coke being reckoned at its coal equivalent. The year 1978 has seen a reversal of this trend in regard to coal with intra-Community deliveries back at about 16.5 million tonnes, but due to slow recovery of demand by the steel industry, coke deliveries have remained close to their 1977 level.

This recovery in German intra-Community coal deliveries has been achieved principally through increased sales for electricity generation at greatly

reduced prices approximating those in the world market for power station coal. There is some doubt, therefore, as to whether last year's level of this business will be maintained in 1979, and its further expansion appears highly problematical at present.

By comparison, intra-Community coal sales by the United Kingdom, the second largest supplier for this trade, are small and coke deliveries insignificant. Since 1975, such coal sales have fluctuated around 2 million tonnes but forecasts suggest that they might reach around 2.5 million tonnes in 1979, mainly to power stations close to the coast.

Among recipients of intra-Community coal exchanges, France has continued to occupy by far the leading position in 1978 with some 7.9 million tonnes, followed by Belgium with around 4.5 million tonnes and Italy with about 2.6 million tonnes. The picture in 1979 is unlikely to be very different, except that with regard to France, there is a margin of uncertainty of about 0.5 million tonnes.

For intra-Community deliveries of coke in 1979, current forecasts suggest a figure of slightly over 5 million tonnes, roughly the same as in 1977 and 1978. However, in view of German efforts to raise intra-Community coke sales as less unprofitable than power station coal sales, a somewhat higher figure cannot be excluded, particularly, if the modest recovery in the steel market mentioned in section III.1. takes place.

2. Trade with third countries

(Tables 26 and 27)

Last year's report indicated that after a rise in coal imports from outside the Community of some 50% in the years following 1973, these appeared to have reached stability at around 45 million tonnes per annum. This has again proved to be so in 1978, with the level of imports little changed from the previous year. However, there have been some shifts with regard to recipient countries and origin.

The increase in Danish imports of about 0.6 million tonnes or 13%, all for power stations, was the largest in the Community. Elsewhere, imports showed little change apart from drops of about 0.8 million tonnes or 8% into Italy, due, primarily, to the depressed state of the steel industry of around 0.5 million tonnes into Belgium and 0.3 million tonnes into the Netherlands.

This shift to electricity generation in the end use of imported coal is imperfectly reflected in the breakdown of estimated total imports for 1978 into steam coal and coking coal in Table 26 C as statistical information available at the time of going to press classes coal by type and not by ultimate use. Once the latter figures are available, these will show a further increase in the preponderance of imports of coal for electricity generation over those for coke production.

On the supply side, there has been a drop of some 3.4 million tonnes, or over 30%, in deliveries from the US, in the main due to strikes in the coalfields early in the year, followed by railway strikes in some of the main lines used for coal exports. Meanwhile, South Africa has further moved up to second place among suppliers having expanded her exports of steam coal by close on 2.8 million tonnes, or 35%, in spite of political pressures in some Member States against the use of South African coal.

Table 26 suggest an increase in imports in 1979 of more than 10%, about equally divided between steam coal and coking coal. However, as some negotiations for deliveries in 1979 were still under way when this table was compiled, a degree of substitution by Community coal, particularly German coal or coke, is a distinct possibility. If no such developments take place, the USA is expected to recover much of the ground lost in 1978 but nevertheless, to remain in third position as an exporter to the Community after Poland and South Africa.

Among importers, France's requirements for electricity generation are expected to rise by a further 2.2 million tonnes, while those of Denmark are likely to require an additional 0.9 million tonnes of imports. Italy's recovery as an importer to about the 1977 level will be a matter partly of larger requirements by the steel industry and partly for electricity generation. Changes in third country imports into other Community countries are likely to be on a smaller scale.

Exports to third countries in 1978 were about 50% above those of the previous year, due almost entirely to increased German sales. As a result, their proportion of total Community coal and coke exports rose from about 70% in 1977 to close on 80% in 1978.

German coke exports, rising from 2.9 million tonnes the previous year to 4.5 million tonnes in 1978, reached their highest level since the worldwide steel industry boom in 1974; a predominant proportion of 1978 coke

exports went to the US. Proportionally, the rise in German coal sales to third countries from 1.6 million tonnes to 3.2 million tonnes was even larger. However, in view of the level of world market prices, much of this

coke and coal business required alignments unattractive to the producers and was justified only by the imbalance between demand and available supplies within the Community and by a desire to reduce excessive stocks.

VIII. COAL AND COKE STOCKS

It should be noted that Tables 28 and 29, giving provisional figures of producers' coal and coke stocks and coal stocks at power stations at the end of 1978 are not strictly comparable with Tables 30 A and 30 B, giving colliery stocks broken down by quality, treatment and coalfields at the end of September 1978, the latest available at the time of going to press.

1. Producers' coal and coke stocks

(Tables 28 and 30)

The most notable stock movement in the Community in 1978 has been a reduction in German producers' coal and coke stocks by some 5.6 million tonnes with coke reckoned at its coal equivalent, or 15% in the course of the year. This is all the more remarkable as coal and coke stocks continued to grow during the early months of 1978, reaching 38.9 million tonnes at the end of March. This stock run-down is due principally to a combination of various production and marketing decisions mentioned in this report.

Except in the United Kingdom, producers' stocks of coal and coke show a fall or little change at the end of 1978 compared to a year previously and, in many cases, no

longer exceed satisfactory operational levels. On the other hand, the British coal industry's stocks increased by about the same as the rise in production in 1978 due, fundamentally, to disposal problems affecting the output of some high-cost coalfields.

2. Coal stocks at power stations

(Table 29)

Coal stocks at power stations at the end of 1978 were substantially higher than a year earlier in France and Denmark and somewhat lower in Germany and the United Kingdom. However, related to total coal-burn in these countries, the movements are either marginal or reflect changed levels of consumption.

Except in the case of Belgium, where stocks at the end of 1977 had been excessive for a coal-producing State, and in the Netherlands, where coal's place as a security of energy supplies factor continues to be marginal, power station coal stocks expressed in terms of day's supplies showed little difference at the end of 1978 from what they had been a year earlier.

TABLE 1
Shares of the various forms of primary energy in gross internal energy consumption

(%)

	Coal and equivalent	Brown coal and equivalent	Oil and equivalent	Natural gas	Nuclear	Electricity and others ⁽¹⁾
1977 (Provisional)						
Belgium	21.6	—	52.7	20.0	6.1	-0.4
Denmark	16.8	—	82.7	—	—	0.5
Germany (FR)	18.4	9.5	51.6	15.0	3.2	2.3
France	15.5	0.5	61.1	10.3	2.2	10.4
Ireland	6.9	13.9	76.4	—	—	2.8
Italy	6.3	0.2	67.3	16.4	0.5	9.3
Luxembourg	39.5	—	32.6	9.3	—	18.6
Netherlands	4.7	—	41.5	51.7	1.3	0.8
United Kingdom	34.3	—	43.2	17.3	4.7	0.5
Community	18.8	2.9	53.9	17.2	2.9	4.3

⁽¹⁾ Electricity production plus imports minus exports.

TABLE 2
Gross domestic product in real terms ⁽¹⁾
(% variation compared with previous year)

	1977	1978 (estimates)	1979 (forecasts)
Belgium	1.3	1.8	3
Denmark	1.9	1.1	2.5
Germany (FR)	2.8	3.1	4
France	3.0	2.9	3.5
Ireland	5.5	6.0	5
Italy	1.7	2.2	4.5
Luxembourg	1.4	3.2	2
Netherlands	2.4	2.4	2
United Kingdom	1.3	3.4	2.5
Community	2.4	2.8	3.5

⁽¹⁾ As stated on 20 March 1979.

TABLE 3

Community coal consumption by sector

Percentages were calculated on figures rounded off to the nearest thousand tonnes.

There is a slight inconsistency between the figures in this table and the percentages for coal consumption in Table 1 as the latter takes account of coke put to stock whereas all coal converted into coke is here treated as coal consumed.

(in million tonnes t=t)

	1977 (actual)	1978 (estimates)	1979 (forecasts)	1978/77 %	1979/78 %
A.					
Power stations	151.5	159.2	164.7	+ 5.1	+ 3.4
Coke ovens	89.0	82.6	85.7	- 7.1	+ 3.7
Iron and steel industry	2.6	2.4	2.5	- 7.1	+ 1.0
Other industries	13.5	13.5	13.6	- 0.2	+ 1.0
Domestic heating	20.3	20.3	19.1	—	- 6.2
Patent fuel plants	4.9	4.8	4.5	- 2.0	- 4.7
Own consumption at mines	2.6	2.4	2.3	- 7.8	- 5.3
Gasworks	1.2	1.0	1.0	- 11.2	—
Others	1.2	1.1	0.9	- 11.8	- 12.0
Statistical difference	0.2	—	—		
Total	287.0	287.4	294.3	+ 0.1	+ 2.4
B.					
Belgium	15.6	16.7	17.2	+ 7.1	+ 3.0
Denmark	5.4	5.7	6.7	+ 6.7	+ 16.5
Germany (FR)	81.2	81.6	81.8	+ 0.5	+ 0.3
France	41.9	43.2	46.0	+ 3.1	+ 6.5
Ireland	0.8	0.8	0.8	+ 1.7	+ 2.5
Italy	12.6	12.1	13.4	- 4.1	+ 10.6
Luxembourg	0.5	0.6	0.6	+ 4.3	+ 4.3
Netherlands	4.7	5.3	5.3	+ 13.9	- 1.1
United Kingdom	124.3	121.4	122.5	+ 0.1	+ 2.4
Total	287.0	287.4	294.3	+ 0.1	+ 2.4

NB: A difference is possible, due to rounding off.

TABLE 4

Steel and pig iron production

(1 000 tonnes)

	1977 (actual)	1978 (provisional)	1979 (forecasts)	% difference	
				1978/77	1979/78
A. STEEL					
BLEU	15 585	17 394	17 000	+ 11.6	- 2.2
Denmark	685	863	875	+ 26.0	+ 1.4
Germany (FR)	38 985	41 250	42 500	+ 5.8	+ 3.0
France	22 089	22 844	24 000	+ 3.4	+ 5.6
Ireland	47	69	75	+ 46.8	+ 8.7
Italy	23 333	24 214	24 000	+ 3.8	- 0.9
Netherlands	4 923	5 582	5 500	+ 13.4	- 1.5
United Kingdom	20 474	20 362	21 500	- 0.5	+ 5.6
Community	126 121	132 578	135 450	+ 5.1	+ 2.2
B. PIG IRON					
BLEU	12 547	14 068	13 850	+ 12.1	- 1.5
Germany (FR)	28 965	30 141	31 500	+ 4.1	+ 4.5
France	18 257	18 501	19 320	+ 1.3	+ 4.4
Italy	11 474	11 397	11 520	- 0.7	+ 1.1
Netherlands	3 922	4 612	4 560	+ 17.6	- 1.1
United Kingdom	12 433	11 628	12 600	- 6.5	+ 8.4
Community	87 598	90 347	93 350	+ 3.1	+ 3.3

TABLE 5

Specific coke input in blast furnaces

(kilograms per tonne)

	1977 (actual)	1978 (estimates)	1979 (forecasts)
Belgium	526	525	525
Germany (FR)	477	480	480
France	504	500	490
Italy	477	475	465
Luxembourg	497	495	490
Netherlands	450	450	445
United Kingdom	603	595	590
Community	505	502	499

TABLE 6
Consumption of coke-oven in the iron and steel industry

(1 000 tonnes)

	1977 (actual)	1978 (estimates)	1979 (forecasts)	1978/77 (%)	1979/78 (%)
Belgium	5 438	5 815	5 920	+ 6.9	+ 1.8
Denmark	60	61	60	+ 1.7	- 1.6
Germany (FR)	16 241	17 480	17 750	+ 7.6	+ 1.5
France	10 242	10 240	10 595	—	+ 3.5
Ireland	10	10	10	—	—
Italy	6 316	6 010	6 205	- 4.8	+ 3.2
Luxembourg	2 006	2 050	2 200	+ 2.2	+ 7.3
Netherlands	1 937	2 230	2 235	+ 15.1	+ 0.2
United Kingdom	8 725	8 265	8 835	- 5.3	+ 6.9
Community	50 975	52 161	53 810	+ 2.3	+ 3.2
<i>Details:</i>					
Input in blast furnaces	44 134	44 980	46 545	+ 1.9	+ 3.5
Sintering	6 316	6 630	6 765	+ 5.0	+ 2.0
Others	525	551	500	+ 5.0	- 9.3

TABLE 7
Community coke consumption by sector

(1 000 tonnes)

	1977 (actual)	1978 (estimates)	1979 (forecasts)	1978/77 (%)	1979/78 (%)
Iron and steel industry	50 975	52 161	53 810	+ 2.3	+ 3.2
Other industries	4 851	4 631	4 688	- 4.5	+ 1.2
Domestic heating	5 557	5 127	4 925	- 7.7	- 3.9
Others	1 340 ⁽¹⁾	1 047	1 097	—	+ 4.8
Total	62 723	62 966	64 520	+ 0.4	+ 2.5

⁽¹⁾ The figures in this line include statistical adjustments and therefore have only limited significance as regards developments from one year to another.

TABLE 8 A
Gross electricity generated in the Community
Breakdown by energy sources

	Production generated TWh			Breakdown in %			% change	
	(actual)	(estimates)	(forecasts)	(actual)	(estimates)	(forecasts)		
	1977	1978	1979	1977	1978	1979	1978/77	1979/78
<i>Gross production in:</i>								
Belgium	47.1	50.9	52.5				+ 8.1	+ 3.1
Denmark	22.4	21.4	24.8				- 4.5	+ 15.9
Germany (FR)	335.3	350.0	368.0				+ 4.4	+ 5.1
France	210.8	228.4	248.5				+ 8.3	+ 8.8
Ireland	9.3	10.0	10.9				+ 7.5	+ 9.0
Italy	166.5	174.9	187.9				+ 5.0	+ 7.4
Luxembourg	1.3	1.3	1.4				—	+ 7.6
Netherlands	58.3	61.5	63.3				+ 5.5	+ 2.9
United Kingdom	283.3	288.7	295.0				+ 1.9	+ 2.2
Total	1 134.4	1 186.8	1 252.3				+ 4.6	+ 5.5
Hydroelectric total	154.6	142.4	136.0	13.6	12.3	10.9	- 7.9	- 4.5
From:								
natural flow	149.2	136.5	129.1	13.1	11.8	10.3	- 8.5	- 5.4
pumped storage	5.4	5.9	6.9	0.5	0.5	0.6	+ 9.3	+ 16.9
Geothermal	2.5	2.5	2.8	0.2	0.2	0.2	—	+ 12.0
Nuclear	113.1	124.6	162.0	10.0	11.2	12.9	+ 10.2	+ 30.0
Conventional thermal total	864.2	917.1	951.5	76.2	76.3	76.0	+ 6.1	+ 3.7
From:								
hard coal and coke	352.5	377.0	390.8	31.1	31.3	31.2	+ 7.0	+ 3.7
lignite and peat	94.4	96.5	96.7	8.3	8.1	7.7	+ 2.2	+ 0.2
oil	251.5	282.7	300.1	22.2	23.4	24.0	+ 12.4	+ 6.2
natural gas	135.9	131.3	133.7	12.0	10.9	10.7	- 3.4	+ 1.8
derived gases	23.6	23.3	23.8	2.1	1.9	1.9	- 1.3	+ 2.1
other fuels	6.3	6.3	6.4	0.5	0.5	0.5	—	+ 1.2

TABLE 8 B

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

(in Petajoules (10^{15} joule) LCV)

	1977 (actual)		1978 (estimates)		1979 (forecasts)		% change	
	PJ	%	PJ	%	PJ	%	1978/77	1979/78
<i>Belgium</i>								
Coal	93.3	27.3	108.7	29.3	117.9	30.8	+ 16.5	+ 8.5
Lignite	—	—	—	—	—	—	—	—
Oil products	138.8	40.6	160.2	43.1	151.9	39.2	+ 15.4	- 5.2
Natural gas	79.9	23.4	70.5	19.0	82.2	21.5	- 11.8	+ 16.6
Other fuels	29.7	8.7	32.2	8.6	32.6	8.5	+ 8.4	+ 1.2
Total	341.7	100.0	371.6	100.0	384.6	100.0	+ 8.8	+ 3.5
<i>Denmark</i>								
Coal	112.6	50.0	125.8	58.3	150.5	60.8	+ 11.7	+ 19.6
Lignite	—	—	—	—	—	—	—	—
Oil products	112.8	50.0	90.1	41.7	97.0	39.2	- 20.1	+ 7.7
Natural gas	—	—	—	—	—	—	—	—
Other fuels	—	—	—	—	—	—	—	—
Total	225.4	100.0	215.9	100.0	247.5	100.0	- 4.2	+ 14.6
<i>Germany (FR)</i>								
Coal	936.5	33.6	961.0	33.7	989.5	34.1	+ 2.6	+ 3.0
Lignite	920.4	33.0	938.2	32.9	940.0	32.5	+ 1.9	+ 0.2
Oil products	270.3	9.7	279.3	9.8	281.5	9.7	+ 3.3	+ 0.8
Natural gas	520.5	18.7	530.8	18.6	543.7	18.8	+ 2.0	+ 2.4
Other fuels	140.2	5.0	141.7	5.0	141.8	4.9	+ 1.0	+ 0.1
Total	2 787.9	100.0	2 851.0	100.0	2 896.5	100.0	+ 2.3	+ 1.6
<i>France</i>								
Coal	453.8	42.4	503.0	43.9	582.5	43.3	+ 10.8	+ 15.8
Lignite	30.3	2.8	31.5	2.7	33.0	2.4	+ 4.0	+ 4.8
Oil products	438.8	41.0	490.7	42.8	605.9	45.0	+ 11.8	+ 23.5
Natural gas	80.1	7.5	55.5	4.9	57.0	4.2	- 30.7	+ 2.7
Other fuels	67.9	6.3	65.6	5.7	68.3	5.1	- 3.4	+ 4.1
Total	1 070.9	100.0	1 146.3	100.0	1 346.7	100.0	+ 7.0	+ 17.5
<i>Ireland</i>								
Coal	0.7	0.9	0.7	0.7	0.7	0.7	- 12.0	- 1.5
Peat	29.1	33.1	28.5	31.1	28.1	28.8	- 2.0	- 1.2
Oil products	57.9	66.0	62.5	68.2	68.9	70.5	+ 8.0	+ 10.2
Natural gas	—	—	—	—	—	—	—	—
Other fuels	—	—	—	—	—	—	—	—
Total	87.7	100.0	91.7	100.0	97.7	100.0	+ 4.6	+ 6.5

TABLE 8 B (cont'd)

	1977 (actual)		1978 (estimates)		1979 (forecasts)		% change	
	PJ	%	PJ	%	PJ	%	1978/77	1979/78
<i>Italy</i>								
Coal	41.2	4.2	49.0	4.5	65.7	5.5	+ 19.0	+ 34.1
Lignite	12.5	1.3	12.1	1.1	12.1	1.0	- 3.3	—
Oil products	780.0	79.3	896.5	82.1	965.8	81.3	+ 14.9	+ 7.7
Natural gas	102.5	10.4	92.1	8.4	98.3	8.3	- 10.1	+ 6.7
Other fuels	47.6	4.8	42.3	3.9	46.1	3.9	- 11.1	+ 9.0
Total	983.8	100.0	1 092.2	100.0	1 188.0	100.0	+ 11.0	+ 8.9
<i>Luxembourg</i>								
Coal	—	0.6	—	0.3	—	0.3	-57.5	—
Lignite	—	—	—	—	—	—	—	—
Oil products	2.5	17.6	2.6	18.6	2.4	17.1	+ 5.2	- 7.6
Natural gas	6.1	43.0	5.6	39.3	5.6	39.3	- 8.9	—
Other fuels	5.5	38.8	6.0	41.8	6.2	43.3	+ 7.8	+ 3.3
Total	14.3	100.0	14.3	100.0	14.3	100.0	- 0.2	—
<i>Netherlands</i>								
Coal	39.7	7.8	44.0	8.2	50.1	9.1	+ 10.8	+ 13.9
Lignite	—	—	—	—	—	—	—	—
Oil products	37.6	7.4	65.6	12.3	70.0	12.6	+ 74.5	+ 6.7
Natural gas	404.1	79.3	399.0	74.6	408.0	73.5	- 1.3	+ 2.3
Other fuels	28.0	5.5	26.4	4.9	27.1	4.8	- 5.7	+ 2.7
Total	509.4	100.0	535.0	100.0	555.2	100.0	+ 5.3	+ 3.8
<i>United Kingdom</i>								
Coal	1 870.0	75.9	1 941.0	76.3	1 959.0	76.6	+ 3.8	+ 0.9
Lignite	—	—	—	—	—	—	—	—
Oil products	510.0	20.7	535.5	21.0	537.5	21.0	+ 5.0	+ 0.4
Natural gas	60.5	2.5	46.0	1.8	40.0	1.6	- 24.0	- 13.0
Other fuels	22.5	0.9	22.0	0.9	22.0	0.8	- 2.2	—
Total	2 463.0	100.0	2 544.5	100.0	2 558.5	100.0	+ 3.3	+ 0.6
<i>Community</i>								
Coal	3 548.0	41.8	3 733.3	42.1	3 915.8	42.2	+ 5.2	+ 4.9
Lignite	992.2	11.7	1 010.3	11.4	1 013.3	10.9	+ 1.8	+ 0.3
Oil products	2 348.6	27.7	2 583.0	29.1	2 780.9	29.9	+ 10.0	+ 7.6
Natural gas	1 253.7	14.8	1 199.5	13.6	1 234.8	13.3	- 4.3	+ 2.9
Other fuels	341.5	4.0	336.2	3.8	344.1	3.7	- 1.5	+ 2.4
Total	8 484.0	100.0	8 862.3	100.0	9 288.9	100.0	+ 4.5	+ 4.8

TABLE 8 C
Consumption of solid fuels in power plants
 (including auto-producers)

(million tonnes)

	1977 (actual)	1978 (estimates)	1979 (forecasts)	% change	
				1978/77	1979/78
<i>Belgium</i>					
Coal	4.4	4.8	4.8	+ 9.3	+ 0.8
<i>Denmark</i>					
Coal	4.5	5.1	6.1	+ 11.8	+ 19.5
<i>Germany (FR)</i>					
Coal	36.8	40.4	41.0	+ 9.6	+ 1.5
Black lignite	1.3	1.3	1.3	} + 1.9	+ 0.2
Brown coal	109.8	111.9	112.2		
<i>France</i>					
Coal	20.2	22.0	24.5	+ 8.9	+ 11.4
Black lignite	1.0	1.0	1.0	} + 4.0	+ 4.8
Brown coal	1.8	1.8	1.9		
<i>Ireland</i>					
Coal	—	—	—	—	—
Peat	3.1	3.0	3.0	- 2.0	- 1.2
<i>Italy</i>					
Coal	1.6	1.9	2.5	+ 19.0	+ 33.8
Brown coal	1.9	1.8	1.8	- 3.3	—
<i>Netherlands</i>					
Coal	1.5	1.6	1.7	+ 6.6	+ 8.3
<i>United Kingdom</i>					
Coal	82.5	83.5	84.0	+ 1.2	+ 0.5
<i>Community</i>					
Coal	151.5	159.2	164.6	+ 5.1	+ 3.4
Black lignite	2.3	2.3	2.3	—	—
Brown coal	111.6	113.7	114.0	+ 1.9	+ 0.3
Peat	3.1	3.0	3.0	- 2.0	- 1.2

NB: A difference is possible due to rounding off.

TABLE 8 D

Coal supplies to public power plants

(This table does not include supplies to power stations owned by the coal industry nor auto-producers)

(Figures for 1978 are estimated)

(1 000 tonnes)

		National coal	Coal from other ECSC countries	Total ECSC coal	Coal from third countries	Total supplies
<i>Belgium</i> ⁽¹⁾	1976	2 697	175	2 872	497	3 369
	1977	3 389	287	3 676	420	4 096
	1978	3 280	220	3 500	765	4 265
<i>Denmark</i>	1976	—	5	5	3 366	3 371
	1977	—	1 001	1 001	3 625	4 626
	1978	—	1 000	1 000	4 660	5 660
<i>Germany (FR)</i> ⁽²⁾	1976	25 050	753	25 803	3 617	29 420
	1977	24 783	786	25 569	4 231	29 800
	1978	27 500	800	28 300	4 500	32 800
<i>France</i>	1976	3 316	562	3 878	6 918	10 796
	1977	3 368	1 692	5 060	9 925	14 985
	1978	2 825	3 275	6 100	10 700	16 800
<i>Italy</i>	1976	—	—	—	1 179	1 179
	1977	—	—	—	1 802	1 802
	1978	—	—	—	1 800	1 800
<i>Netherlands</i>	1976	10	49	59	937	996
	1977	16	292	308	1 157	1 465
	1978	—	150	150	1 200	1 350
<i>United Kingdom</i>	1976	78 139	67	78 206	1 254	79 460
	1977	78 790	221	79 011	475	79 486
	1978	80 870	150	81 020	880	81 900
<i>Community</i>	1976	109 212	1 611	110 823	17 768	128 591
	1977	110 346	4 279	114 625	21 635	136 260
	1978	114 475	5 595	120 070	24 505	144 575

⁽¹⁾ Including shale recuperation, in t=t.⁽²⁾ Including Bergbauverbundkraftwerke.

TABLE 9
Coal and coke-oven coke consumption in various industries ⁽¹⁾
 (not including power stations)

(1 000 tonnes)

	1977 (actual)	1978 (estimates)	1979 (forecasts)	1978/77 %	1979/78 %
Belgium	2 265	2 810	2 895	+ 24.0	+3.0
Denmark	670	510	460	- 23.9	- 9.8
Germany (FR)	4 645	4 235	4 085	- 8.8	- 3.5
France	2 465	2 650	2 865	+ 7.5	+ 8.1
Ireland	34	40	40	+ 17.6	—
Italy	870	700	740	- 19.5	+ 5.7
Luxembourg	4	3	3	- 25.0	—
Netherlands	299	388	395	+ 29.8	+ 1.8
United Kingdom	7 149	6 850	6 850	- 4.2	—
Community	18 401	18 186	18 333	- 1.2	+ 0.8

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

TABLE 10 A
Deliveries of coal, patent fuel and coke for domestic heating
(including issues to workers)

(1 000 tonnes)

		1977	1978	1979	Difference in %	
		(actual)	(estimates)	(forecasts)	1978/77	1979/78
<i>Belgium</i>	Coal	1 611	1 640	1 540	+ 1·8	- 6·1
	Patent fuel	224	200	145	- 10·6	- 27·5
	Coke	24	20	20	- 16·6	—
	Total	1 859	1 860	1 705	—	- 8·3
<i>Denmark</i>	Coal	51	45	40	- 11·8	- 11·8
	Coke	41	40	40	- 2·4	—
	Total	92	85	80	- 7·6	- 5·9
<i>Germany (FR)</i>	Coal	1 430	1 350	1 250	- 5·6	- 7·4
	Patent fuel	1 057	975	900	- 7·7	- 7·7
	Coke	2 055	1 790	1 640	- 12·9	- 8·4
	Total	4 542	4 115	3 790	- 8·4	- 7·9
<i>France</i>	Coal	3 031	3 325	2 820	+ 9·7	- 15·2
	Patent fuel	2 279	2 300	1 950	+ 0·9	- 15·2
	Coke	286	255	235	- 10·8	- 7·8
	Total	5 596	5 880	5 005	+ 5·1	- 14·9
<i>Ireland</i>	Coal	680	680	700	—	+ 2·9
<i>Italy</i>	Coal	247	160	120	- 35·3	- 25·0
	Patent fuel	32	30	30	- 6·3	—
	Coke	251	310	310	+ 23·5	—
	Total	530	500	460	- 24·9	- 16·4
<i>Luxembourg</i>	Coal	7	6	5	- 14·3	- 16·6
	Patent fuel	1	1	1	—	—
	Coke	2	2	2	—	—
	Total	10	9	8	- 10·0	- 11·1
<i>Netherlands</i>	Coal	98	100	80	+ 2·0	- 20·0
	Patent fuel	5	4	3	- 20·0	- 25·0
	Coke	11	10	8	- 9·1	- 20·0
	Total	114	114	91	—	- 20·2
<i>United Kingdom</i>	Coal	13 144	13 000	12 500	- 1·1	- 3·9
	Patent fuel	1 067	1 000	1 000	- 6·3	—
	Coke	2 887	2 700	2 670	- 6·5	- 1·2
	Total	17 098	16 700	16 170	- 2·3	- 3·2
<i>Community</i>	Coal	20 299	20 306	19 055	—	- 6·2
	Patent fuel	4 665	4 510	4 029	- 3·3	- 10·7
	Coke	5 557	5 127	4 925	- 7·7	- 3·9
	Total	30 521	29 943	28 009	- 1·9	- 6·5

TABLE 10 B

Deliveries of lignite briquettes and peat for domestic heating
(including issues to workers)

(1 000 tonnes)

	1977	1978	1979	Difference in %	
				1978/77	1979/78
Belgium	22	20	20	- 9.1	—
Denmark	14	12	10	- 14.3	- 16.6
Germany (FR)	3 443	3 250	3 000	- 5.6	- 7.7
France	233	210	190	- 9.9	- 9.5
Ireland — Peat	485	445	440	- 8.2	- 1.1
— Peat briquettes	350	365	375	+ 4.3	+ 2.7
Total	808	810	815	+ 0.2	+ 0.6
Italy	75	70	60	- 6.6	- 14.3
Luxembourg	36	35	30	- 2.8	- 4.3
Netherlands	12	10	8	- 16.6	- 20.0
United Kingdom	—	—	—	—	—
Community	5 478	5 227	4 948	- 5.5	- 5.3

NB: Average calorific values: Lignite briquettes: 20 215 kJ/kg,
Peat: 9 080 kJ/kg,
Peat briquettes: 18 585 kJ/kg.

TABLE 11
Hard coal production by areas

(1 000 tonnes)

	1977 (actual)	1978 (provisional)	1979 (forecasts)
Campine	6 272	5 963	6 300
Sud	796	627	525
<i>Belgium</i>	7 068	6 590	6 825
Ruhr	74 091	72 804	74 050
Aachen	5 529	5 350	5 550
Niedersachsen	2 103	2 425	2 425
Saar	9 261	9 200	9 450
Kleinzechen	327	325	325
<i>Germany (FR)</i> (National series)	91 310 (84 513)	90 104 (83 400)	91 800 (85 000)
Nord/Pas-de-Calais	6 641	5 974	5 030
Lorraine	10 033	9 764	10 400
Centre-Midi	4 619	3 952	3 745
<i>France</i>	21 294	19 690	19 175
<i>Ireland</i>	54	32	50
Scotland	8 557	8 025	107 500
North East	12 729	12 675	
Yorkshire	31 122	33 045	
North West	10 758	10 700	
Midlands/Kent	35 818	35 250	
South Wales	7 561	7 450	
Licensed mines and opencast	14 129	14 540	14 500
<i>United Kingdom</i>	120 674	121 685	122 000
<i>Community</i> (National series)	240 401 (233 604)	238 101 (231 397)	239 850 (233 050)

NB: A difference is possible due to rounding off.

TABLE 12
Hard coal production in terajoules

(10¹² joules)

	10 ³ tonnes	Tj	Kj/kg (1)
<i>1977</i>			
Belgium	7 068	187 210	26 487
Germany (FR)	91 310	2 533 686	27 748
France	21 294	551 581	25 903
Ireland	54	1 143	21 167
United Kingdom	120 674	2 945 261	24 407
Community	240 401	6 218 881	25 869
<i>1978 (Provisional)</i>			
Belgium	6 590	173 790	26 372
Germany (FR)	90 104	2 508 225	27 837
France	19 690	513 488	26 079
Ireland	32	694	21 680
United Kingdom	121 685	2 959 500	24 321
Community	238 101	6 155 697	25 853

(1) Lower calorific value in kilojoule per kilo.

NB: A difference is possible due to rounding off.

TABLE 13
Personnel employed underground – yearly average

(1 000s)

	1977 (actual)	1978 (estimates)	1979 (forecasts)	Changes 1978/77		Changes 1979/78	
				1 000	%	1 000	%
Belgium	17·9	17·5	17·0	-0·4	-2·8	-0·5	-2·9
Germany (FR)	122·5	121·5	118·0	-1·0	-0·8	-3·5	-2·9
France	39·0	35·8	33·0	-3·2	-8·2	-2·8	-7·8
United Kingdom	191·2	187·5	181·5	-3·7	-1·9	-6·0	-3·2
Community	370·6	362·3	349·5	-8·3	-2·2	-12·8	-3·5

NB: According to the new definition agreed between the SOEC and the Member States, this table includes officials who are regularly employed underground.

TABLE 14
Output per man/hour underground

	kg man/hour			% change	
	1977 (actual)	1978 (estimates)	1979 (forecasts)	1978/77	1979/78
Belgium	283	281	290	- 0.7	+ 3.2
Germany (FR)	521	533	543	+ 2.3	+ 1.9
France	325	330	335	+ 1.5	+ 1.5
United Kingdom	363	374	385	+ 3.0	+ 2.9
Community	405	416	424	+ 2.7	+ 1.9

TABLE 15
Production costs and revenue per tonne
(% variations according to data supplied in national currencies)

	Production costs		Revenue	
	1977/76	1978/77 (provisional)	1977/76	1978/77 (provisional)
Belgium	+ 3.7	+ 7.5	- 5.3	- 2.0
Germany (FR)	+ 5.2	+ 5.5	- 0.8	+ 4.5
France	+ 6.6	+ 10.0	+ 1.2	+ 4.5
United Kingdom	+ 17.3	+ 18.0	+ 16.0	+ 10.0

TABLE 16
State aids to the coal industry
(Direct and indirect aids)

(EUA/tonne produced)

	Direct aids ⁽¹⁾		Indirect aids		Total	
	1977	1978	1977	1978	1977	1978
Belgium	28.51	33.10	2.24	2.49	30.45	33.59
Germany (FR)	3.56	8.46 ⁽²⁾	0.39	0.10	3.95	8.56 ⁽²⁾
France	19.51	21.68	0.26	0.30	19.77	21.98
United Kingdom	0.48	0.32 ⁽³⁾	—	—	0.48	0.32 ⁽³⁾
Community	4.11	6.14	0.24	0.14	4.35	6.28

⁽¹⁾ Including coking coal aid.

⁽²⁾ Includes only part of coking coal aid.

⁽³⁾ Incomplete.

TABLE 17
Investments in coal production and preparation

	<i>(million EUA)</i>		
	1977 (actual)	1978 (estimates)	1979 ⁽¹⁾ (forecasts)
Belgium	12.9	24.3	—
Germany (FR)	248.7	274.1	227.9
France	48.6	47.5	38.3
United Kingdom	518.0	556.2	556.5
Community	828.2	902.1	822.7

⁽¹⁾ Excluding investments not formally decided or engaged.

TABLE 18
Pit closures

	1978		1979	
	Number	1977 output (1 000 tonnes)	Number	1977 output (1 000 tonnes)
Belgium				
— Sud	1	76	1	122
Germany (FR)				
— Ruhr	2	3 212	1	749
France				
— Nord/Pas-de-Calais	1	690	2	584
— Lorraine	—	—	1	675
— Centre-Midi	1	38	2	303
Total	2	728	5	1 562
United Kingdom				
— Scotland	3	489	—	—
— North East	2	121	—	—
— Yorkshire	2	285	1	243
— Midlands	1	405	—	—
— South Wales	1	199	—	—
Total	9	1 499	1	243
Community	14	5 515	8	2 676

TABLE 19 A
Listed pithead prices for Community coal at 1 January, 1 May 1978 and 1 January 1979

Category	Type	Date	Ruhr DM	Aachen DM	Saar DM	Belgium Bfrs	Nord FF	Lothringen FF	South Wales £	Scotland £	North Yorkshire £
Anthracite	Nuts 3 20/30 mm	1. 1. 1978	236.00	—	—	3 550	420.00	—	39.37	—	—
		1. 5. 1978	236.00	—	—	3 650	457.00	—	43.30	—	—
		1. 1. 1979	241.00	—	—	3 750	470.00	—	43.30	—	—
Lean coal	Nuts 3 20/30 mm	1. 1. 1978	226.00	225.25	—	3 450	—	—	33.66	—	—
		1. 5. 1978	226.00	225.25	—	3 450	—	—	37.00	—	—
		1. 1. 1979	231.00	229.25	—	3 450	—	—	37.00	—	—
Semi-bituminous	Nuts 4 10/20 mm	1. 1. 1978	182.00	198.75	—	—	—	—	—	—	—
		1. 5. 1978	182.00	198.75	—	—	—	—	—	—	—
		1. 1. 1979	185.50	210.00	—	—	—	—	—	—	—
Long flame	Nuts 2 30/50 mm	1. 1. 1978	170.50	—	192.00	2 450	—	250.00	—	29.82	25.20
		1. 5. 1978	170.50	—	192.00	2 450	—	270.00	—	32.40	27.60
		1. 1. 1979	173.00	—	196.00	2 450	—	294.00	—	32.40	27.60
Long flame	Nuts 5 6/10 mm	1. 1. 1978	172.50	—	189.00	2 450	—	223.00 ⁽²⁾	—	28.74	23.03
		1. 5. 1978	172.50	—	189.00	2 450	—	240.00 ⁽³⁾	—	31.20	25.30
		1. 1. 1979	175.00	—	193.00	2 450	—	259.00 ⁽⁴⁾	—	31.20	25.30
Coking coal	Medium or high volatile	1. 1. 1978	175.50	184.00	190.00 ⁽⁵⁾	2 500	340.00	321.00 ⁽⁵⁾	34.70	31.10 ⁽⁵⁾	29.04 ⁽⁵⁾
		1. 5. 1978	175.50	184.00	190.00	2 500	340.00	321.00	37.60	34.40	32.00
		1. 1. 1979	179.00	188.00	194.00	2 500	340.00	321.00	37.60	36.10	29.80
Coke	Blast furnace 40 mm	1. 1. 1978	274.00	272.00	299.00	3 650 ⁽¹⁾	510.00	535.00	66.09	65.11	64.62
		1. 5. 1978	274.00	272.00	299.00	3 650	510.00	535.00	72.98	72.00	71.50
		1. 1. 1979	279.00	277.00	303.00	3 650	510.00	535.00	72.98	72.00	71.50

(1) Carcoke.

(2) Power stations: 271.00 - 281.00.

(3) Power stations: 295.00 - 305.00.

(4) Power stations: 300.00 - 315.00.

(5) High volatile.

TABLE 19 B

Listed pithead prices for Community coal at 1 January, 1 May 1978 and 1 January 1979

(in US \$) ⁽¹⁾ ⁽²⁾

Category	Type	Date	Ruhr	Aachen	Saar	Belgium	Nord	Lothringen	South Wales	Scotland	North Yorkshire	Lowest price	Highest price	Difference %
Anthracite	Nuts 3 20/30 mm	1. 1. 1978	112.25	—	—	108.40	90.27	—	76.48	—	—	76.48	112.25	47
		1. 5. 1978	113.96	—	—	113.08	99.22	—	78.85	—	—	78.85	113.96	45
		1. 1. 1979	133.27	—	—	131.37	113.44	—	88.64	—	—	—	88.64	133.27
Lean coal	Nuts 3 20/30 mm	1. 1. 1978	107.49	107.13	—	105.34	—	—	65.39	—	—	65.39	107.49	64
		1. 5. 1978	109.13	108.77	—	106.89	—	—	67.37	—	—	67.37	109.13	62
		1. 1. 1979	127.74	126.77	—	120.86	—	—	75.74	—	—	—	75.74	127.74
Semi-bituminous	Nuts 4 10/20 mm	1. 1. 1978	86.56	94.53	—	—	—	—	—	—	—	86.56	94.53	9
		1. 5. 1978	87.88	95.97	—	—	—	—	—	—	—	87.88	95.97	9
		1. 1. 1979	102.58	116.12	—	—	—	—	—	—	—	102.58	116.12	13
Long flame	Nuts 2 30/50 mm	1. 1. 1978	81.09	—	91.32	74.81	—	53.74	—	57.93	48.95	48.95	91.32	87
		1. 5. 1978	82.33	—	92.71	75.90	—	58.62	—	59.00	50.26	50.26	92.71	85
		1. 1. 1979	95.66	—	108.38	85.83	—	70.96	—	66.32	56.50	56.50	108.38	92
Long flame	Nuts 5 6/10 mm	1. 1. 1978	82.05	—	89.89	74.81	—	47.93 ⁽⁴⁾	—	55.83	44.74	44.74	89.89	100
		1. 5. 1978	83.30	—	91.27	75.90	—	52.11 ⁽⁵⁾	—	56.81	46.07	46.07	91.27	98
		1. 1. 1979	96.77	—	106.72	85.83	—	62.51 ⁽⁶⁾	—	63.87	51.79	51.79	106.72	106
Coking coal	Medium or high volatile	1. 1. 1978	83.47	87.52	90.37 ⁽³⁾	76.34	73.08	69.00 ⁽³⁾	67.40	60.41 ⁽³⁾	56.41 ⁽³⁾	56.41	90.37	60
		1. 5. 1978	84.75	88.85	91.75	77.45	73.82	69.69	68.47	62.64	58.27	58.27	91.75	58
		1. 1. 1979	98.98	103.96	107.28	87.58	82.07	77.48	76.97	73.90	61.00	61.00	107.28	76
Coke	Blast furnace 40 mm	1. 1. 1978	130.32	129.37	142.21	111.45	109.62	114.99	128.38	126.48	125.52	109.62	142.21	30
		1. 5. 1978	132.21	131.34	144.38	113.08	110.73	116.15	132.89	131.11	130.19	110.73	144.38	30
		1. 1. 1979	154.28	153.17	167.55	127.87	123.10	129.13	149.39	147.38	146.36	123.10	167.55	36

(1) Dollar exchange rate

Index	Bfrs	Index	FF	Index	£	Index
2. 1. 1978	32.75	100	4.65	100	0.51	100
24. 4. 1978	32.27	99	4.60	99	0.54	108
2. 1. 1979	28.54	86	4.14	89	0.48	96

(2) Prices are not adjusted for quality differences.

(3) High volatile.

(4) Power stations: 58.25 to 60.40 \$/tonne.

(5) Power stations: 64.05 to 66.22 \$/tonne.

(6) Power stations: 72.41 to 76.03 \$/tonne.

TABLE 20
Average cif prices for steam coal imported from third countries as reported by the Member States

	I/77	II/77	III/77	IV/77	I/78	II/78	III/78
In EUA ⁽¹⁾ /Tj ⁽²⁾ ⁽³⁾							
Maximum	1 455	1 470	1 280	1 284	1 249	1 198	1 163
Average	1 046	1 081	1 063	1 099	1 054	1 057	1 046
Minimum	1 010	1 028	1 011	1 038	978	1 005	975
In \$/tonne							
Maximum	41.3	41.5	36.7	37.6	38.9	37.0	36.9
Average	30.4	31.2	30.8	32.7	33.1	33.1	34.1
Minimum	28.6	29.6	28.9	30.3	30.0	31.4	31.6

⁽¹⁾ Converted at the average exchange rates, published by Eurostat.

⁽²⁾ 1 Tj = 34.12 tce = 23.89 toe.

⁽³⁾ Rounded up to nearest whole figure.

TABLE 21
Coke-oven coke production capacity

(million tonnes)

	Belgium	Germany (FR)	France	Italy	Netherlands	United Kingdom	Community
1977							
Colliery coke ovens	—	24.5	8.0	—	—	4.6	37.1
Iron and steel industry	7.8	9.1	6.7	9.0	2.5	9.6	44.7
Independent	0.1	—	—	2.6	0.7	3.1 ⁽¹⁾	6.5
Total	7.9	33.6	14.7	11.6	3.2	17.3	88.3
(of which coastal coking plants)	(1.5)	(0.5)	(4.0)	(11.6)	(3.2)	(..)	(..)
1978							
Colliery coke ovens	—	23.0	6.0	—	—	4.2	33.2
Iron and steel industry	7.6	9.1	6.7	9.0	2.5	8.9	43.8
Independent	0.1	—	—	2.6	0.5	3.0 ⁽¹⁾	6.2
Total	7.7	32.1	12.7	11.6	3.0	16.1	83.2
(of which coastal coking plants)	(1.5)	(0.5)	(4.0)	(11.6)	(3.0)	(..)	(..)
1979							
Colliery coke ovens	—	22.2	6.0	—	—	3.3	31.5
Iron and steel industry	7.5	9.6	6.7	9.0	2.5	11.3	46.6
Independent	0.1	—	—	2.6	0.5	3.0 ⁽¹⁾	6.2
Total	7.6	31.8	12.7	11.6	3.0	17.6	84.3
(of which coastal coking plants)	(1.5)	(0.5)	(4.0)	(11.6)	(3.0)	(..)	(..)

⁽¹⁾ Including LTC.

TABLE 22
Coke-oven coke

(1 000 tonnes)

	Coal deliveries to coking plants	Consumption of coal in coking plants	Production of coke-oven coke	
			1 000 tonnes	Variation in % versus the previous year
<i>1977 (actual)</i>				
Belgium	7 258	7 325	5 569	- 10.4
Germany (FR)	35 055	35 260	27 499	- 13.9
France	13 548	13 541	10 769	- 4.8
Italy	10 022	10 532	7 676	- 3.2
Netherlands	3 253	3 212	2 501	- 11.1
United Kingdom	19 338	19 456	14 194	- 9.9
Community	88 474	89 416	68 208	- 10.2
<i>1978 (estimates)</i>				
Belgium	7 180	7 350	5 696	+ 2.3
Germany (FR)	32 500	32 500	25 415	- 7.6
France	12 650	12 650	10 300	- 4.4
Italy	9 825	9 825	7 200	- 6.2
Netherlands	3 485	3 485	2 900	+ 16.0
United Kingdom	16 820	16 820	12 200	- 14.0
Community	82 460	82 630	63 711	- 6.6
<i>1979 (forecasts)</i>				
Belgium	7 840	7 840	6 030	+ 5.9
Denmark	32 500	32 500	25 400	—
France	13 500	13 500	11 150	+ 8.3
Italy	10 575	10 575	7 770	+ 7.9
Netherlands	3 300	3 300	2 560	- 11.7
United Kingdom	18 000	18 000	13 550	+ 11.1
Community	85 715	85 715	66 460	+ 4.3

TABLE 23
Coal supplies to coke ovens

(1 000 tonnes)

	National coal	Coal from other ECSC countries	Total ECSC coal	Coal from third countries	Total supplies
<i>Belgium</i>					
1976	3 818	1 978	5 796	2 611	8 407
1977	3 732	1 344	5 076	2 268	7 344
1978	3 845	1 690	5 535	1 645	7 580
<i>Germany (FR)</i>					
1976	40 651	209	40 860	87	40 947
1977	34 787	185	34 972	82	35 054
1978	32 375	100	32 475	25	32 500
<i>France</i>					
1976	6 793	3 422	10 215	4 588	14 803
1977	6 288	3 550	9 838	4 037	13 875
1978	5 850	3 250	9 100	3 550	12 650
<i>Italy</i>					
1976	—	2 321	2 321	8 523	10 844
1977	—	2 110	2 110	8 066	10 176
1978	—	2 400	2 400	7 425	9 825
<i>Netherlands</i>					
1976	—	700	700	2 882	3 582
1977	—	571	571	2 675	3 246
1978	—	1 285	1 285	2 200	3 485
<i>United Kingdom</i>					
1976	20 229	124	20 353	1 250	21 603
1977	17 938	145	18 083	933	19 016
1978	15 450	200	15 650	1 170	16 820
<i>Community</i>					
1976	71 491	8 754	80 245	19 941	100 186
1977	62 748	7 905	70 650	18 061	88 711
1978	57 520	8 925	66 445	16 015	82 460

NB: 1978 = estimates.

TABLE 24
Trend of intra-Community trade in coal

(1 000 tonnes)

To \ From	Belgium	Denmark	Germany (FR)	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total
<i>Belgium</i>										
1977	—	—	3 111	69	—	—	—	3	135	3 318
1978	—	—	4 230	70	—	—	—	45	140	4 485
1979	—	—	4 375	75	—	—	—	—	225	4 675
<i>Denmark</i>										
1977	—	—	895	—	—	—	—	—	91	986
1978	—	—	900	—	—	—	—	—	100	100
1979	—	—	900	—	—	—	—	—	200	1 100
<i>Germany (FR)</i>										
1977	222	—	—	334	1	—	—	—	486	1 043
1978	110	—	—	310	—	—	—	10	670	1 100
1979	120	—	—	220	—	—	—	—	660	1 000
<i>France</i>										
1977	37	—	4 998	—	—	—	—	7	795	5 837
1978	60	—	7 110	—	—	—	—	—	680	7 850
1979	40	—	6 460	—	—	—	—	—	1 000	7 500
<i>Ireland</i>										
1977	13	—	8	—	—	—	—	—	172	193
1978	—	—	10	—	—	—	—	—	150	160
1979	—	—	—	—	—	—	—	—	150	150
<i>Italy</i>										
1977	—	—	2 212	24	—	—	—	—	5	2 241
1978	—	—	2 550	20	—	—	—	—	10	2 580
1979	—	—	2 500	20	—	—	—	—	20	2 540
<i>Luxembourg</i>										
1977	42	—	292	30	—	—	—	1	18	383
1978	35	—	300	30	—	—	—	—	—	365
1979	—	—	300	40	—	—	—	—	—	340
<i>Netherlands</i>										
1977	2	—	786	4	1	—	—	—	151	944
1978	—	—	1 150	5	—	—	—	—	170	1 325
1979	—	—	1 095	5	—	—	—	—	300	1 400
<i>United Kingdom</i>										
1977	186	—	203	25	41	—	—	338	—	793
1978	—	—	220	—	—	—	—	—	—	220
1979	—	—	270	—	—	—	—	—	—	270
<i>Total deliveries</i>										
1977	502	—	12 505	486	43	—	—	349	1 853	15 738
1978	205	—	16 470	435	—	—	—	55	1 920	19 085
1979	160	—	15 900	360	—	—	—	—	2 555	18 975

TABLE 25
Trend of intra-Community trade in coke-oven coke

(1 000 tonnes)

To \ From	Belgium	Denmark	Germany (FR)	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total
<i>Belgium</i>										
1977	—	—	38	67	—	—	—	179	16	300
1978	—	—	160	50	—	—	—	200	25	435
1979	—	—	110	35	—	—	—	135	20	300
<i>Denmark</i>										
1977	—	—	27	61	—	—	—	2	16	106
1978	—	—	30	60	—	—	—	—	15	105
1979	—	—	20	60	—	—	—	—	20	100
<i>Germany (FR)</i>										
1977	28	2	—	162	7	—	—	161	111	471
1978	10	—	—	125	—	—	—	160	130	425
1979	10	—	—	120	—	—	—	150	120	400
<i>France</i>										
1977	57	—	1 708	—	—	28	—	340	6	2 139
1978	60	—	1 505	—	—	30	—	110	15	1 720
1979	100	—	1 605	—	—	35	—	80	30	1 850
<i>Ireland</i>										
1977	—	—	—	—	—	—	—	—	10	10
1978	—	—	—	—	—	—	—	—	10	10
1979	—	—	—	—	—	—	—	—	10	10
<i>Italy</i>										
1977	—	—	39	86	—	—	—	1	—	126
1978	—	—	65	60	—	—	—	—	—	125
1979	—	—	85	45	—	—	—	—	—	130
<i>Luxembourg</i>										
1977	118	—	1 653	13	—	—	—	—	2	1 786
1978	60	—	1 965	30	—	—	—	—	—	2 055
1979	40	—	2 130	35	—	—	—	—	—	2 205
<i>Netherlands</i>										
1977	1	—	167	13	—	—	—	—	7	188
1978	10	—	150	25	—	—	—	—	50	235
1979	10	—	180	20	—	—	—	—	60	270
<i>United Kingdom</i>										
1977	1	—	7	1	—	—	—	—	—	9
1978	—	—	10	—	—	—	—	—	—	10
1979	—	—	5	5	—	—	—	—	—	10
<i>Total deliveries</i>										
1977	205	2	3 639	403	7	28	—	683	168	5 135
1978	140	—	3 885	350	—	30	—	470	245	6 120
1979	160	—	4 135	320	—	35	—	365	260	5 275

TABLE 26
 Import of coal from third countries

(million tonnes)

	1977 (actual)	1978 (estimates)	1979 (forecasts)
<i>A. By country of destination</i>			
Belgium	3.2	2.7	3.6
Denmark	4.6	5.2	6.1
Germany (FR)	5.6	5.7	5.3
France	15.5	15.7	17.7
Ireland	0.7	0.7	0.6
Italy	10.3	9.5	10.8
Luxembourg	0.1	0.2	0.2
Netherlands	3.8	3.5	3.8
United Kingdom	2.1	2.1	2.4
Community	46.0	45.3	50.6
<i>B. By country of origin</i>			
USA	10.7	7.3	10.0
Canada	0.9	0.7	0.9
Australia	6.7	6.8	7.1
South Africa	7.8	10.6	11.3
Poland	14.8	14.8	16.2
USSR	4.2	4.2	4.3
Others	0.9	0.9	0.8
Total	46.0	45.3	50.6
<i>C. By sector of consumption</i>			
Steam coal	24.2	24.5	26.9
Coking coal	17.5	17.2	19.9
Others	4.3	3.6	3.8
Total	46.0	45.3	50.6

TABLE 27
Imports of coal from third countries – 1978
(Estimates)

(1 000 tonnes)

	USA	Canada	Australia	South Africa	Poland	USSR	Others	Total
Belgium	850	130	210	625	500	280	105	2 700
Denmark	—	300	300	1 000	2 800	600	200	5 200
Germany (FR)	900	300	850	1 190	2 000	150	300	5 690
France	1 490	—	1 775	6 750	4 720	855	160	15 750
Ireland	—	—	—	—	700	—	—	700
Italy	2 750	—	1 100	800	2 750	2 100	—	9 500
Luxembourg	—	—	—	200	—	—	—	200
Netherlands	900	—	1 300	100	900	200	100	3 500
United Kingdom	380	—	1 260	—	410	—	—	2 050
Community	7 270	730	6 795	10 665	14 780	4 185	865	45 290

TABLE 28
Community producers' stocks
A. Stocks of coal

(1 000 tonnes)

	End of 1977 (actual)	End of 1978 (provisional)	End of 1979 (forecasts)	Difference	
				1978/77	1979/78
Belgium	720	265	370	- 455	+ 105
Germany (FR)	17 279	14 073	13 623	- 3 206	- 450
France	5 011	4 917	4 827	- 94	- 90
Ireland	30	30	30	—	—
United Kingdom	10 585	12 400	13 165	+ 1 815	+ 765
Community ⁽²⁾	33 634	31 685	32 015	- 1 949	+ 330

B. Stocks of coke-oven coke

(1 000 tonnes)

	End of 1977 (actual)	End of 1978 (provisional)	End of 1979 (forecasts)	Difference	
				1978/77	1979/78
Belgium	118	86	81	- 32	- 5
Germany (FR)	15 428	13 599	12 054	- 1 829	- 1 545
France	1 351	1 180	1 180	- 171	—
Italy	978	500	710	- 478	+ 210
Netherlands	27	25	25	- 2	—
United Kingdom	3 693	3 400	3 215	- 293	- 185
Community	21 595	18 790	17 265	- 2 805	- 1 525

C. Stocks of coal and coke-oven coke

(1 000 tonnes)

	End of 1977 (actual)	End of 1978 (provisional)	End of 1979 (forecasts)	Difference	
				1978/77	1979/78
Belgium	873	377	475	- 496	+ 98
Germany (FR)	37 335	31 752	29 293	- 5 583	- 2 459
France	6 767	6 451	6 361	- 316	- 90
Ireland	30	30	30	—	—
Italy	1 280	650	923	- 630	+ 273
Netherlands	35	33	33	- 2	—
United Kingdom	15 386	16 820	17 345	+ 1 434	+ 525
Community	61 706	56 113	54 460	- 5 593	- 1 653

(¹) Including 'Notgemeinschaft'.
(²) Including 9 in Italy.

TABLE 29
Stocks of coal at power stations

	End of 1977 (actual)	End of 1978 (estimates)		Difference 1978/77
		1 000 tonnes	Days	
Belgium	903	550	41	- 353
Denmark	2 471	3 050	220	+ 579
Germany (FR)	6 279	5 800	52	- 479
France	4 346	5 540	84	+ 1 194
Ireland	—	—	—	—
Italy	849	850	125	+ 1
Luxembourg	—	—	—	—
Netherlands	390	250	55	- 140
United Kingdom	19 127	18 500	81	- 627
Community	34 365	34 540	76	+ 175

TABLE 30

Breakdown of coal stocks

(Total colliery stocks at the end of September 1978)

A. By group and by preparation

(1 000 tonnes)

	Large and graded	Smalls washed	Untreated smalls and fines	Part treated smalls	Run of mine	Slurry	Total
<i>Belgium</i>							
Groups I + II	3	4	—	1	—	41	49
Groups V – VI	22	127	2	19	—	—	170
Groups III – IV – VII	—	—	—	—	—	—	—
Total	25	131	2	20	—	41	219
<i>Germany (FR)</i>							
Groups I + II	108	408	3	618	—	4	1 141
Groups V – VI	163	1 197	11	4 341	—	157	5 869
Groups III – IV – VII	463	734	43	203	—	617	2 060
Total	734	2 339	57	5 162	—	778	9 070
+ 'Notgemeinschaft'							7 403
Total							16 473
<i>France</i>							
Groups I + II	84	236	237	668	1	242	1 468
Groups V – VI	391	639	692	900	1	847	3 470
Groups III – IV – VII	20	17	432	93	—	125	687
Total	495	892	1 361	1 661	2	1 214	5 625
<i>Ireland III – IV – VII</i>							
	—	—	—	—	30	—	30
<i>United Kingdom</i>							
Groups I + II	20	556	896	37	849	—	2 358
Groups V – VI	155	2 524	801	303	650	—	4 433
Groups III – IV – VII	413	974	1 870	684	641	—	4 582
Total	588	4 054	3 567	1 024	2 140	—	11 373
<i>Community</i>							
Groups I + II	215	1 204	1 136	1 324	850	287	5 016
Groups V – VI	731	4 487	1 506	5 563	651	1 004	13 942
Groups III – IV – VII	896	1 725	2 345	980	671	742	7 359
Total	1 842	7 416	4 987	7 867	2 172	2 033	26 317

B. By group and by area

(1 000 tonnes)

	Groups I-II	Groups V-VI	Groups III-VI-VII	Total
<i>Belgium</i>				
Campine	—	170	—	170
Bassin Sud	49	—	—	49
Total	49	170	—	219
<i>Germany (FR)</i>				
Ruhr	224	5 491	55	5 770
Saar	—	300	1 236	1 536
Aachen	330	78	769	1 177
Niedersachsen	587	—	—	587
Total	1 141	5 869	2 060	9 070
+ 'Notgemeinschaft'	—	—	—	7 403
Total				16 473
<i>France</i>				
Nord/Pas-de-Calais	1 094	649	4	1 746
Lorraine	—	2 151	—	2 151
Centre-Midi	374	670	683	1 728
Total	1 468	3 470	687	5 625
<i>Ireland</i>				
	—	—	30	30
<i>United Kingdom</i>				
Scotland	—	84	162	246
Northern	—	2 183	208	2 391
Yorkshire	—	661	453	1 114
North Western	—	617	38	655
Midlands	—	36	1 450	1 486
South Wales	1 611	215	1 493	3 319
Opencast	747	637	778	2 162
Total	2 358	4 433	4 582	11 373
<i>Community</i>				
	5 016	13 942	7 359	26 317

Balance of supply and demand: hard coal 1979

	Belgium	Denmark	Germany (FR)	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Community
(1 000 tonnes)										
1. Production (t=t) (National series)	6 825 (6 825)	— (—)	91 800 (85 000)	19 175 (19 175)	50 (50)	—	—	—	122 000 (122 000)	239 850 (233 050)
2. Recoveries	2 340	—	600	1 500	—	—	—	—	1 500	5 940
3. Receipts from other ECSC countries	4 675	1 100	1 000	7 500	150	2 540	340	1 400	270	(18 975)
4. Imports from third countries	3 565	6 100	5 300	17 700	630	10 845	245	3 865	2 400	50 650
5. Total availabilities	17 405	7 200	98 700	45 875	830	13 385	585	5 265	126 170	296 440
6. Inland demand:										
(a) power stations at mines	300	—	10 400	6 800	—	—	—	—	200	17 700
(b) public power stations	4 440	6 610	25 500	17 000	50	2 475	5	1 700	81 000	138 780
(c) coking plants	7 840	—	32 500	13 500	—	10 575	—	3 300	18 000	85 715
(d) iron and steel industry (of which power stations)	175 (—)	— (—)	1 500 (1 200)	1 550 (250)	— (—)	15 (—)	575 (—)	— (—)	200 (100)	4 015 (1 550)
(e) other industries (of which power stations)	2 695 (—)	450 (—)	6 600 (3 900)	1 700 (—)	35 (—)	140 (—)	— (—)	175 (—)	8 550 (2 800)	20 345 (6 700)
(f) domestic heating	1 475	40	900	2 700	700	120	5	80	10 500	16 520
(g) miscellaneous										
1. issues to workers	65	—	350	120	—	—	—	—	2 000	2 535
2. patent fuel plants	95	—	1 400	1 800	—	40	—	—	1 200	4 535
3. own consumption at mines	10	—	300	375	—	—	—	—	1 000	1 685
4. gasworks	—	100	900	—	45	—	—	—	—	1 045
5. railways	5	—	100	20	—	20	—	—	—	145
6. others	—	—	800	—	—	—	—	—	—	800
Total	17 100	7 200	81 250	45 565	830	13 385	585	5 255	122 650	293 820
7. Deliveries to other ECSC countries	160	—	15 900	360	—	—	—	—	2 555	(18 975)
8. Exports to third countries	40	—	2 000	40	—	—	—	10	200	2 290
9. Total requirements	17 300	7 200	99 150	45 965	830	13 385	585	5 265	125 405	296 110
10. Producers' stocks (beginning)	265	—	14 073	4 917	30	—	—	—	12 400	31 685
11. Additions/withdrawals from stocks	+ 105	—	-450	-90	—	—	—	—	+ 765	+ 330
12. Producers' stocks (end)	370	—	13 623	4 827	30	—	—	—	13 165	32 015

Coal — Intra-Community exchanges, 1979

(1 000 tonnes)

To	From	Belgium	Denmark	Germany (FR)	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total receipts
Belgium			—	4 375	75	—	—	—	—	225	4 675
Denmark		—		900	—	—	—	—	—	200	1 100
Germany (FR)		120	—		220	—	—	—	—	660	1 000
France		40	—	6 460	—	—	—	—	—	1 000	7 500
Ireland		—	—	—	—	—	—	—	—	150	150
Italy		—	—	2 500	20	—	—	—	—	20	2 540
Luxembourg		—	—	300	40	—	—	—	—	—	340
Netherlands		—	—	1 095	5	—	—	—	—	300	1 400
United Kingdom		—	—	270	—	—	—	—	—	—	270
	Total deliveries	160	—	15 900	360	—	—	—	—	2 555	18 975

Balance of supply and demand: coke 1979

(1 000 tonnes)

	Belgium	Denmark	Germany (FR)	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Community
1. Production — coke-oven coke	6 030	—	25 400	11 150	—	7 770	—	2 560	13 550	66 460
— gas coke	—	70	675	—	35	—	—	—	—	780
— total	6 030	70	26 075	11 150	35	7 770	—	2 560	13 550	67 240
2. Receipts from other ECSC countries	300	100	400	1 850	10	130	2 205	270	10	(5 275)
3. Imports from third countries	10	—	400	—	—	—	—	60	—	470
4. Total availabilities	6 340	170	26 875	13 000	45	7 900	2 205	2 890	13 560	67 710
5. Inland demand:										
(a) iron and steel industry	5 920	60	17 750	10 595	10	6 205	2 200	2 235	8 835	53 810
(b) other industries	200	10	1 385	1 165	5	600	3	220	1 100	4 688
(c) domestic users	15	40	1 040	125	4	300	2	8	2 670	4 204
(d) miscellaneous	—	—	—	—	—	—	—	—	—	—
— issues to workers	5	—	600	110	—	10	—	—	—	725
— own consumption	5	10	260	325	1	50	—	2	230	883
— others	—	—	200	10	—	—	—	—	—	210
Total	6 145	120	21 235	12 330	20	7 165	2 205	2 465	12 835	64 520
6. Deliveries to other ECSC countries	160	—	4 135	320	—	35	—	365	260	(5 275)
7. Exports to third countries	40	50	3 050	350	25	490	—	60	650	4 715
8. Total requirements	6 345	170	28 420	13 000	45	7 690	2 205	2 890	13 745	69 235
9. Producers' stocks (beginning)	86	—	13 599	1 180	—	500	—	25	3 400	18 790
10. Additions/withdrawals from stocks	-5	—	-1 545	—	—	+ 210	—	—	- 185	- 1 525
11. Producers' stocks (end)	81	—	12 054	1 180	—	710	—	25	3 215	17 265

Coke-oven coke — Intra-Community exchanges, 1979

(1 000 tonnes)

To	From	Belgium	Denmark	Germany (FR)	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total receipts
Belgium			—	110	35	—	—	—	135	20	300
Denmark		—		20	60	—	—	—	—	20	100
Germany (FR)		10	—		120	—	—	—	150	120	400
France		100	—	1 605		—	35	—	80	30	1 850
Ireland		—	—	—	—		—	—	—	10	10
Italy		—	—	85	45	—	—	—	—	—	130
Luxembourg		40	—	2 130	35	—	—	—	—	—	2 205
Netherlands		10	—	180	20	—	—	—	—	60	270
United Kingdom		—	—	5	5	—	—	—	—	—	10
	Total deliveries	160	—	4 135	320	—	35	—	365	260	5 275

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