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I

(Information)

COMMISSION

GENERAL COAL MARKET SITUATION
FORECASTS FOR 1975I. GENERAL ECONOMIC SITUATION — DEVELOPMENT OF INTERNAL ENERGY
CONSUMPTION

The Community's gross domestic product is estimated to have grown in real terms in 1974 by 2 %, compared with 5.5 % in 1973. Economic activity slackened in all member countries but particularly in the United Kingdom, mainly because of strikes, and in Germany, Denmark, Netherlands and Ireland. On the other hand, four member countries, i.e. France, Italy, Belgium and Luxembourg recorded an increase in GNP in real terms of some 4.5% on average over the year.

TABLE 1

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

	1973	1974
Belgium	+ 5.4	+ 4.3
Denmark	+ 3.8	+ 1.5
Germany	+ 5.3	+ 0.6
France	+ 6.0	+ 3.8
Ireland	+ 7.2	+ 1.5
Italy	+ 5.9	+ 4.0
Luxembourg	+ 7.5	+ 4.7
Netherlands	+ 4.0	+ 2.0
United Kingdom	+ 5.3	— 0.7
Community	+ 5.5	+ 2.0

The slowing down of economic activity in the Community, which was aggravated by the effects of the oil crisis, was strongly marked in the second half of the year, mainly because of the sharp decline in internal demand which was felt particularly strongly in the car industry, the textile industry and the building trade.

The outlook for the first half of 1975 offers little prospect of any fundamental change in recent

economic trends. However, economic activity should pick up again in the second half of the year. The Community's GDP is expected to grow by 1.5% in real terms during the whole of 1975, i.e. slightly less than in 1974, but the large differences from country to country last year should even out somewhat in 1975.

Economic recovery in the Community will be boosted by increased activity in industrialized non-member countries. In the United States in particular the economic situation should improve at the end of 1975.

Internal demand will probably expand more rapidly in 1975 than in 1974. In the Community as a whole, the downward trend in the volume of investment in fixed assets should level out in 1975. However, investment activity will vary considerably from country to country. Investment growth will probably slow down considerably in France, Ireland and Belgium and a reduction in investments is probable in Denmark, Italy and Luxembourg, but an increase in real terms is expected in Germany and a slight increase in the Netherlands and the United Kingdom in the course of the year. In addition, household consumption could increase slightly more rapidly in 1975 than in 1974 in the Community as a whole. This should be the case in particular in Germany, Denmark and the United Kingdom. However, exports will expand less vigorously in 1974 under the influence of the world economic climate, so industrial production in the Community will remain relatively low throughout the year.

Nevertheless, a slight increase in industrial production is expected in Germany, France and the United Kingdom. The rate of industrial production is likely to continue to slow down on average over

the year in Ireland, and a fall in production cannot be ruled out in Italy and Luxembourg.

TABLE 2
Trend of industrial production
(% variation compared with the previous year)

	1973	1974	1975
Belgium	+ 5.7	+ 6.2	— 3.0
Denmark	.	.	.
Germany	+ 8.0	— 1.6	+ 0.5
France	+ 7.0	+ 2.7	+ 3.0
Ireland	+ 9.2	+ 3.0	+ 2.0
Italy	+ 9.0	+ 4.0	— 8.0
Luxembourg	+ 12.2	+ 3.5	— 9.0
Netherlands	+ 6.2	+ 4.0	— 0.5
United Kingdom	+ 8.6	— 2.9	+ 3.0
Community	+ 8.4	± 0	+ 0.5

The general lull in the movement of world raw material prices and the slower rate of wage increases in several member countries ought to have a restraining effect on internal costs and prices. In addition, the balance of payments deficit run by the Community as a whole should be lower than the exceptional level reached in 1974 (about \$ 14 000 million). A slight improvement is expected in the external balance of Denmark and Italy.

Before moving on to the coal figures proper, Table 3 indicates in what proportions gross internal energy consumption is covered by the various forms of primary energy and shows the differing degrees of dependence of the respective Community countries on oil. Oil covered 60% on average of the Community's energy requirements in 1973.

TABLE 3
Shares of the various forms of primary
energy in gross internal energy consumption in 1973

	Coal and equivalent	Brown coal and equivalent	Oil and equivalent	Natural gas	Primary electricity	Other fuels	Total
Belgium	24.5	—	59.9	15.8	— 0.2	—	100.0
Denmark	12.2	—	88.0	—	— 0.2	—	100.0
Germany	22.6	8.5	55.1	10.4	3.1	0.3	100.0
France	15.6	0.5	68.7	7.7	7.4	0.1	100.0
Ireland	7.8	15.2	64.5	—	2.5	—	100.0
Italy	5.9	0.3	75.1	11.1	7.4	0.2	100.0
Netherlands	49.0	0.4	33.1	3.9	13.5	0.1	100.0
Luxembourg	4.6	—	48.0	47.5	— 0.1	—	100.0
United Kingdom	36.0	—	48.8	11.5	3.7	—	100.0
Community	20.8	2.7	59.5	12.6	4.3	0.1	100.0

Annex 1 gives the breakdown of gross internal energy consumption in 1973 in absolute terms expressed in tonnes of coal equivalent (tce), by member country and by form of energy.

II. COAL PRODUCTION AND FINANCIAL SITUATION OF THE COLLIERIES

1. COAL PRODUCTION

In spite of the new line of the energy policy and coal policy of the Commission and the Governments of

the Member States resulting from the events on the world market for oil at the end of 1973 and the ensuing crisis, Community coal production in 1974 was 28 million tce less than in 1973, in other words it dropped by 11%.

There are three reasons for this drop in production:

1. falling off in production as a result of strikes in the United Kingdom and France,
2. the closure of pits, in particular in Germany,
3. a reduction or, in some cases, a very small increase in output per manshift.

From the figures in the table below the following pattern emerges for the various Community countries:

- In Belgium, the drop in production in 1974 (0.3 million tce less than in 1973) is mainly due to colliery closures in the Sud coalfield.
- In Germany, pits with a total capacity of about six million metric tons were closed in 1974 as part of the rationalization programme. The

resulting drop in production was partially offset by an increase in production in profitable pits. Coal production as a whole in Germany fell by three million tce in 1974 compared with 1973.

— In France, coal production dropped by 2.4 million tce partly because of a strike, and partly because of pit closures, in particular in the Nord/Pas-de-Calais coalfield.

— In the Netherlands, the drop in production (from 1.7 million tce in 1973 to 0.9 million tce in 1974) was part of the Government's programme of closures, which terminated in complete shutdown on 1 January 1975.

— In the United Kingdom, the large drop in coal production (about 21 million tce less in 1974 than in 1973) was the result of a prolonged strike in the Spring of 1974 and an unsatisfactory development in output per manshift.

TABLE 4
Coal production

(in 1 000 tce)

	1973	1974 Provisional	1975 Forecasts	1974/73 %	1975/74 %
Belgium	7 995	7 700	7 500	— 3.7	— 2.6
Germany	98 770	95 750	95 750	— 3.1	—
France	23 330	20 900	20 900	— 10.4	—
Ireland	60	50	50	— 16.7	—
Netherlands	1 700	850	—	— 50.0	— 100.0
United Kingdom	118 270	96 930	121 750	— 18.0	+ 25.6
Community	250 125	222 180	245 950	— 11.2	+ 10.7

Community coal production in 1975 is likely to be higher than in the preceding year and could amount to about 246 million tce.

2. CLOSURE OF COLLIERIES

As indicated in Table 5 below, most of the production capacity (six million metric tons) closed down in 1974 was in Germany. In general, mines were closed down in 1974 not because of a fall in the demand for coal but in order to rationalize production. This policy of rationalization is likely to be continued in 1975 and further unprofitable or worked-out pits will be closed down.

TABLE 5
Closure of collieries

	1974		1975	
	Number	Final year's output (in 1 000 metric tons)	Number	Production 1973 (in 1 000 metric tons)
Belgium:				
Sud	3	750	1	126
Germany:				
Ruhr	4	6 024	2	2 620
Aix	.	—	1	1 052
France:				
Nord/Pas-de-Calais	2	365	—	—
Lorraine	—	—	1	365
Centre Midi	1	222	2	174
Netherlands	2	850	—	—
United Kingdom:				
Scottish	2	214
North East	5	695
Yorkshire	1	231
Midlands	2	819
Total	22	10 170		

3. EMPLOYMENT TREND

On 30 September 1974, the total labour force (miners, clerical workers and apprentices) employed in Community collieries was 605 700 i.e. 3.2% less than on 30 September 1973. The number of men employed underground represented 60% of this total.

TABLE 6
Average number of registered miners working below ground

	1973	1974	1975	Difference 1974/73		Difference 1975/74	
				1 000 men	%	1 000 men	%
Belgium	20.0	18.8	18.0	— 1.2	— 6.0	— 0.8	— 4.3
Germany	113.7	109.3	109.3	— 4.4	— 3.9	—	—
France	46.7	42.0	39.2	— 4.7	— 10.1	— 2.8	— 6.6
Ireland	0.3	0.3	0.3	—	—	—	—
Italy	0.3	—	—	— 0.3	— 100.0	—	—
Netherlands	2.9	1.2	—	— 1.7	— 58.3	— 1.2	— 100.0
United Kingdom	177.7	169.2	171.7	— 8.5	— 4.8	+ 2.5	+ 1.5
Community	361.6	340.8	338.5	— 20.8	— 5.7	— 2.3	— 0.7

The average rate of reduction in manpower recorded in the Community in recent years (some 5 to 6%), is likely to slow down in 1975 as the size of the work force in Germany should remain constant and a slight increase in personnel is expected in the United Kingdom.

In Germany, the recruitment of foreign workers from outside the Community is still prohibited, but the number of former miners returning to the mines and newly recruited personnel is offsetting the number of men leaving. The same applies to an even greater extent in the United Kingdom in view of the general employment situation.

The foreign work force in the Community has increased slightly as a percentage (from 12.5 to 13.2%), but the number of foreign workers has decreased in absolute terms by 1 600: all nationalities have been affected with the exception of Turkish workers whose numbers have increased by about 7%. There is still only a very small foreign work force in

the United Kingdom as almost all workers, regardless of their origin, are British subjects.

The age structure for mineworkers as a whole was as follows in the main producer countries, Germany and the United Kingdom:

Age structure

	(in %)			
	Under 30 years	30 to 40 years	40 to 50 years	Over 50 years
Germany	21.6	24.9	38.8	14.7
United Kingdom	18.4	16.9	24.2	40.5

4. OUTPUT PER MANSHIFT

As indicated in Table 7 below, output per manshift in Community collieries increased only slightly in 1974. In certain countries, notably Germany and the United Kingdom, output even fell.

In connection with the development of output in 1974, it should be pointed out that, as a result of the new coal policy objectives and changed conditions on the coal market, undertakings have been endeavouring to reorganize collieries with a view to keeping production at its present level in the long term.

A considerable amount of work has had to be carried out in the mines in order to exploit new reserves; this tends to have an adverse effect on productivity growth.

For example:

- output per manshift increased by just over 1% in Belgium and France;
- in the Netherlands, where output per manshift increased by 10%, a special situation had arisen as a result of pit closures;
- in Germany, the 2.8% reduction in output per manshift is a result of reorganization measures taken to extract new coal reserves in underground mines;
- in the United Kingdom, the fairly large reduction in output per manshift is due to industrial action preceding the strike in the Spring of 1974.

TABLE 7
Output per underground manshift

	In kg per manshift 1974	Change (in %)	
		1974/73	1975/74 Forecasts
Belgium	2 590	+ 1.4	+ 2.0
Germany	4 198	— 2.8	+ 1.0
France	2 799	+ 1.2	+ 3.0
Netherlands	4 200	+10.3	—
United Kingdom	3 260	— 9.0	+ 4.0

5. PRODUCTION COSTS AND REVENUE

The increase in miners' wages in 1973 and 1974 was far greater than the increase in output per manshift. No exact figures concerning the increases in wages are available

but it can be generally taken that miners' wages increased (in 1973 and 1974) by between 10 and 20% in the Community as a whole and by more than 20% in the United Kingdom.

The fact that wages outstripped productivity combined with the general increase in the prices of raw materials used in mines led to a considerable increase in production costs in 1974 (see Table 8).

TABLE 8

Production costs and revenue (per metric ton)

(% variations according to data supplied in national currencies)

	Production costs		Revenue ⁽¹⁾	
	1973/72	1974/73 (Provisional)	1973/72	1974/73 (Provisional)
Belgium	+ 17.3	+ 16.2	+ 0.7	+ 17.8
Germany	+ 10.0	+ 22.0	+ 5.7	+ 32.2
France	+ 14.1	+ 20.0	+ 5.1	+ 40.0
Netherlands	+ 18.8	+ 18.4	+ 6.1	+ 28.0
United Kingdom	..	+ 30.0	..	+ 37.0

⁽¹⁾ These are minimum figures and do not allow for the increases in coal prices at the end of 1974.

There was a significant increase in the range of variations in the list prices of all Community collieries in 1974. Increases in the price of the main products competing with Community coal (oil products and American coking coal) enabled European producers to make substantial price increases to bridge the gap between income and production costs.

Movements in list prices since the end of 1973 (an average of four increases in the case of the major producers) have not been the same for all the different categories of products and consumers. Cumulative increases from January 1974 to January 1975 amount to 20 to 50% in Germany, 30 to 95% in Belgium, 40 to 90% in France and 40 to 100% in the United Kingdom. The highest increases were recorded in the case of coking coal and blast-furnace coke; these increases were in line with the trend on the world market ⁽¹⁾.

⁽¹⁾ The average price of standard coking coal cif ARA increased from \$ 27.55 to \$ 56.75 per metric ton between October 1973 and October 1974 (the freight rate included in this amount increased by \$ 3 in the same period).

At the beginning of 1975 Community coal prices still compared favourably with those of competing products.

Annexes 2 and 3 give listed pithead prices for the main categories and grades produced by Community coalfields as at 15 January 1974, 1 July 1974 and 15 January 1975. Prices are given in national currencies, with the corresponding indices (Annex 2), and also in dollars so that price comparisons can be made between coalfields and with competing products (Annex 3). In the latter case, the indices are influenced both by price movements expressed in national currencies and by changes in the exchange rate of the dollar (in the event of parity readjustments these changes can directly affect the producer's return in real terms): compared with the bracket of indices based on national currencies expressed in dollars it is 12 to 17% wider for French, German and Belgian prices and 6 to 9% narrower for UK prices ⁽²⁾.

Table 9 below shows the spreads between the highest and lowest list prices of four reference grades on 15 January 1975.

⁽²⁾ See the rates at the foot of Annex 3.

TABLE 9
Spreads between highest and lowest list prices on 15 January 1975

(in \$ per metric ton ⁽¹⁾)

	Lowest prices	Highest prices	Spread %
Anthracites 20/30	59.21 South Wales	86.04 Belgium	45
Coking smalls	37.48 Yorkshire	76.10 Nord	103
Long flame 6/10	31.27 Yorkshire	67.46 Belgium	116
Blast furnace coke 40 mm	81.97 Yorkshire	114.00 Sarre	39

⁽¹⁾ Price obtained by applying the exchange rates ruling on 2 January 1975.

The spreads shown in the last column of Table 9 are much the same as those recorded 12 months ago. They are still very high in the case of industrial and coking coal. In general the differences became narrower between January and November 1974. Price changes announced by continental coalfields at the beginning of 1975 again widened the gap between their prices and UK prices.

6. STATE AID

A comparison (Table 8) reveals that revenue increased far more than costs in 1974, with the result

that the financial situation of the Community coal industry improved in that year.

However, although this improvement was not enough to enable undertakings to avoid making a loss, state subsidies were lower in 1974. This is important as it marks the end of the upward trend in state aid which has persisted for several years.

The large increase in subsidies to the coal industry in the Netherlands (see Table 10) is attributable to exceptional circumstances due to the final phasing out of coal production in the Netherlands.

TABLE 10
State aids to the coal industry (direct and indirect aids)

(in u.a. per metric ton produced)

	Direct aids ⁽¹⁾		Indirect aids		Total	
	1973	1974	1973	1974	1973	1974
Belgium	17.18	14.15	0.58	0.62	17.76	14.77
Germany	3.19	2.60	0.63	1.39	3.82	3.99
France	10.65	10.69	0.35	0.30	11.00	10.99
Netherlands	5.72	18.24	—	—	5.72	18.24
United Kingdom	4.03	1.31	—	—	4.03	1.31
Community	4.78	3.24	0.30	0.61	5.08	3.85

⁽¹⁾ Including aids in respect of coking coal.

7. INVESTMENT PROGRAMMES IN THE COMMUNITY COAL INDUSTRY

Investment in the Community coal industry in 1973 amounted to about 290 million units of account 1.1 units of account per metric ton produced. Specific investment expenditure was appreciably higher in the UK coal industry (1.5 units of account per metric ton) than in those of the continental Member States (average 0.8 units of account per

metric ton). In the latter, investment expenditure over the period 1954 to 1959 amounted to 1.05 units of account per metric ton. Although the prices of capital goods and the weight of capital in coal production have greatly increased since then, in 1974 specific investment expenditure was still only 0.9 units of account per metric ton in the Federal Republic and Lorraine, and have averaged only 0.5 units of account per metric ton in the remaining continental coalfields. This investment was appreciably below

normal amortization and its only purpose, virtually, was to maintain existing plant and support rationalization measures.

The sudden transformation of the energy supply situation was a turning-point in the investment policy of the European coal industry. Programmes recently adopted or proposed for the most promising Community coalfields are now not only directed more positively to the maintenance of existing pits, but also include investment for the purpose of increasing certain existing capacities or creating new capacities. Since some pits will still have to be closed because of obsolescence or because they have been worked out, such investment is essential in order to stabilize Community production, which is one of the medium-term objectives approved by the Council of Ministers on 17 December 1974.

United Kingdom

As part of its plan for coal, the NCB submitted in 1974 an investment programme which was approved by a mixed study commission composed of representatives of the Government, the NCB and the trade unions concerned ⁽¹⁾.

The UK coal industry has at present a normal production capacity of about 130 million metric tons per year (120 million metric tons from underground workings and 10 million metric tons from opencast). It is estimated that between now and 1985 underground production capacity will fall by about 40 million metric tons per year, mainly owing to exhaustion of seams. The plan for coal proposes to offset this fall by creating between now and 1985 the following additional production capacities:

- opencast workings: five million metric tons per year,
- underground workings: 42 million metric tons per year, including:
 - nine million metric tons per year by means of investments to prolong the lifetime of existing pits,
 - 13 million metric tons per year by increasing the production capacity of existing pits,
 - 20 million metric tons per year by opening of new pits.

⁽¹⁾ Coal Industry Examination: Interim Report 1974 and Final Report 1974.

The investment expenditure required to create an additional production capacity of 42 million metric tons per year is evaluated at £ 600 million (1974 prices). Taking into account the other maintenance and rationalization expenditure already planned (about £ 800 million), total investment expenditure up to 1985 is estimated at about £ 1 400 million.

In principle, the Government does not intend to provide direct investment finance, but will ensure that the necessary conditions for investment exist (self-financing and/or loans).

Germany

The Federal Government approved in October 1974 the continuation of the 1973 energy programme. It expects 'a production capacity of 94 million metric tons by 1980' which amounts virtually to stabilization of production in the medium term.

According to the German coal industry, such stabilization implies the creation by 1985 of a new production capacity of five to seven million metric tons per year. In order to achieve this the annual investment in the coal industry would have to be increased appreciably. It is estimated that the total necessary investment required up to 1985 will amount to 18 000 DM ⁽²⁾.

The energy programme therefore provides for an increase in investment aid from its present figure of 160 million DM to 210 million DM (Federal Government and Länder). It also proposes energy policy measures designed to secure markets for coal in the iron and steel and electricity industries, and thus safeguard investment as far as possible.

France

In the autumn of 1974, the French Government approved a revised version of the medium-term coal plan, based on a calculation of the profitability of various coalfields, assuming a medium-term fuel-oil price of 2.5 to 3.0 centimes per thermal unit (i.e. FF 175 to 210 per tce), and on a revised assessment of reserves. It recommends a slower cut-back in production than the previous plan as the following table shows:

⁽²⁾ In the pits and the coal processing plants.

(in millions of metric tons)

Coalfield	1974 production plan	1980 forecasts	
		former plan	revised plan
Nord/Pas-de-Calais	9.2	3	5
Lorraine	10.2	8	10
Centre-Midi	5.7	2	5 to 6
Total	25.1	13	10 to 21

Under the new plan, production in the Nord/Pas-de-Calais coalfield will not be brought to a halt in 1983 but at a later date.

The additional investment expenditure as compared with the original plan, is estimated at a minimum of FF 140 million. Should deeper seams be mined in certain pits in the Nord/Pas-de-Calais, a further FF 60 million would be needed.

Belgium

In Belgium the aim of the medium-term energy policy is to keep production in the Campine coalfield steady at about its present level. In the *Netherlands* production ceased on 1 January 1975 in accordance with the closure programme.

III. EXTERNAL TRADE

1. IMPORTS FROM NON-MEMBER COUNTRIES

World trade in coal expanded between 1972 and 1974, most rapidly during the last year; estimates for this year total 166 million metric tons, or 11 million more than the previous year. Table 11 shows the reactions in 1974 to the strong pressure of demand and the use by sellers of all their available resources, but with varying degrees of flexibility. The first point to note is that in the US, despite the miners' strike of November and December 1974, exports of almost 52 million metric tons recovered to the level reached

two years previously, following a setback in 1973 when US coal faced strong competition from other sources. Deliveries from Canada remained at the same level, while those from Australia fell owing to strikes and to floods which have hampered opencast working. A point to note is that the marked increase in deliveries from Poland is due to a growth of production, which rose from 156.6 million metric tons in 1973 to 162 million metric tons in 1974, and partly also to the sale of existing stocks on the home market. Of the 41 million metric tons exported, 25 million metric tons were to 'the West' and the remainder to socialist countries.

TABLE 11

World coal trade — principal importers and exporters

(in millions of metric tons)

Imports				Exports			
	1972	1973	1974 estimate		1972	1973	1974 estimate
Community of the Nine	31.6	29.9	38.3	Community of the Nine	0.9	1.0	1.8
Other West European countries	12.5	14.1	12.7	Other West European countries	0.4	0.1	—
USSR	9.7	9.1	9.5	USSR	24.4	24.5	26.3
GDR	7.6	8.7	9.6	Poland	32.5	35.9	41.0
Other East European countries	14.8	14.5	16.1	Czechoslovakia	3.3	2.9	4.0
Canada	17.9	14.9	12.0	Canada	7.7	10.9	10.9
Latin America	3.0	3.4	3.3	USA	51.1	48.6	51.9
Japan	49.3	56.9	60.5	Australia	24.4	28.0	26.3
Others	2.0	3.8	4.0	Others	3.7	3.4	3.8
Total	148.4	155.3	166.0	Total	148.4	155.3	166.0

The demand for coal, and especially coking coal, led to a marked increase in 1974 in imports from non-member countries, which is likely to have reached 38 million metric tons for the Community of the Nine as against less than 30 million metric tons the previous year. 1975 should see a further rise to 40 million metric tons owing to the dwindling of pithead stocks and the reduced availabilities from new production. However, the recession forecast for the iron and steel industry should relieve the pressure of demand for supplies from non-member countries.

As Table 12 shows, there is no general rule governing the trend of coal imports into member countries. Some are returning to the 1973 level after the upswing in 1974 for economic reasons and because there is enough fuel oil, whereas others are continuing to increase their coal imports.

TABLE 12
Imports of coal from non-member countries

(in 1 000 metric tons)

	1973 Actual imports	1974 Estimated imports	1975 Forecasts
Belgium and Luxembourg	3 374	4 286	4 460
Denmark	3 008	3 500	3 000
Germany	4 518	4 800	7 000
France	5 441	8 800	10 430
Ireland	650	750	750
Italy	8 667	9 600	8 425
Netherlands	2 860	3 095	3 235
United Kingdom	1 380	3 500	2 900
Community	29 898	38 331	40 200

Table 13 gives the detailed breakdown of imports for 1974 by origin and country of destination, but the figures are as yet only estimates.

TABLE 13
Community imports in 1974

(in 1 000 metric tons)

	USA	Poland	USSR	Australia	South Africa	Others	Total
Belgium	1 433	1 687	453	315	202	196	4 286
Denmark	—	3 150	350	—	—	—	3 500
Germany	2 100	2 050	220	—	330	100	4 800
France	2 555	3 375	1 420	715	580	155	8 800
Ireland	50	700	—	—	—	—	750
Italy	3 420	3 135	1 820	1 000	100	125	9 600
Luxembourg	—	—	—	—	—	—	—
Netherlands	1 335	1 000	30	440	100	190	3 095
United Kingdom	1 750	735	—	1 015	—	—	3 500
Community	12 643	15 832	4 293	3 485	1 312	766	38 331

Poland has been the leading source of supply since 1973 and is expected to hold its position in 1975 with nearly 16 million metric tons. Supplies from the US have been affected by various production difficulties and especially the strikes of November and December 1974, and also by the impact of strong internal demand, resulting sometimes in appreciable cuts in the tonnages contracted for.

Australia is consolidating its outlets in Europe with the aim of diversifying its markets though the bulk of its exports continue to go to Japan. Exports to the Community from South Africa should double in two years, when the present fully extended port capacities have been augmented. These capacities should increase to 10 million metric tons when the new port of Richards Bay comes into operation.

Table 14 shows the recent growth in deliveries broken down by countries of origin.

TABLE 14

Imports from non-member countries according to country of origin

(in 1 000 metric tons)

	1973 Actual imports	1974 Estimated imports	1975 Forecasts
USA	10 152	12 643	13 545
Poland	12 275	15 832	15 950
USSR	3 759	4 293	4 400
Australia	2 165	3 485	3 570
South Africa	652	1 312	1 665
Others	895	766	1 070
Total	29 898	38 331	40 200

As regards quality in 1973, 17 million of the 30 million metric tons imported consisted of coking coal, and eight million of steam coal. The remainder was made up of anthracites, mainly from the USSR, for domestic use, and of lean small coal for the sintering of iron ore.

Trade in coal is for the most part carried out under medium- and long-term contracts. With a few exceptions these contracts have not withstood the upward leap in oil prices, and buyers have been pressed by sellers to agree to a periodic adjustment of prices to the level of the international energy market, with a special premium for coking coals. The decreased activity of the steel industry in 1975 should lead to a less lively demand for coking coal and hence to a return to normal prices for this product, which was selling at black market rates during the steel boom.

After a steep rise similar to that for spot purchase prices, freight rates for coal by sea have returned

to normal as a result of the collapse of oil freight rates due to the plentiful availability of tankers, in conjunction with a certain drop in the volume of oil transported.

2. EXPORTS TO NON-MEMBER COUNTRIES

Coal exports to non-member countries rose in 1974 somewhat above the level of previous years. Out of an estimated total of 1.87 million metric tons, 1.6 million were exported from Germany, more than half going to non-European countries, including the US. The estimates for 1975 suggest that coal exports will fall to 1.37 million metric tons.

Exports of furnace coke rose sharply in 1974 to an estimated total of 6.89 million metric tons, including 4.1 million metric tons from Germany, in contrast to previous years in which they had totalled about 2.5 million metric tons. 2.9 million metric tons of the German exports were to non-European countries, mainly the US. It is expected that in 1975 the exports

of furnace coke from Germany will fall to 1.9 million metric tons with a total for the Community of a little less than four million metric tons.

The regular exports of coal and furnace coke to European countries (e.g. Austria, Switzerland and Sweden) are continuing at the usual rate.

IV. ANALYSIS OF INTERNAL DEMAND FOR COAL

1. TREND IN TOTAL INTERNAL DEMAND

It is not possible to get a clear picture of the recent trend on the coal market from the total Community figures for deliveries by major sectors of consumption in the period 1973 to 1975. (A similar observation was made in the paper on the 1974 situation). The labour disputes in the UK collieries in 1974 caused not only a substantial fall in production but also a considerable drop in consumption in a number of important sectors. Excluding figures for the United Kingdom, recent consumption trends in the two main sectors of use, coke-ovens and power stations, are as follows:

(in 1 000 tce)

	1973	1974	1975
Coke-ovens	82 459	86 161	84 625
Power stations	50 366	51 866	50 656

The table indicates that coal consumption by power stations remained fairly constant but consumption by coke-ovens fluctuated as a result of variations in blast furnace coke production to balance the demand for coke and due allowance must be made for the running down of producers' stocks.

Coal consumption in all sectors of the Community is estimated at 280.4 million metric tons for 1975, this is only slightly less than the actual figures for 1973.

TABLE 15

Coal consumption by sector — Community of the Nine

(in 1 000 tce)

	1973	1974 Estimates	1975 Forecasts	1974/73 %	1975/74 %
Coke-ovens	107 069	107 160	108 125	+ 0.1	+ 0.9
Thermal power stations	112 592	108 536	117 156	- 3.6	+ 7.9
Domestic heating	27 906	24 885	24 885	- 10.8	—
Iron and steel industry	3 630	3 165	3 665	- 12.8	+ 15.8
Briquettes	7 399	6 950	6 460	- 6.1	- 7.1
Other industries	15 565	14 025	14 720	- 9.9	+ 5.2
Gasworks	2 702	2 470	1 870	- 8.6	- 24.3
Railways	1 240	890	855	- 28.2	- 3.9
Consumption for production	3 108	2 465	2 645	- 20.7	+ 7.3
Total	281 211	270 546	280 381	- 3.8	+ 3.6

Coke consumption varies mainly according to the needs of the iron and steel industry which now consumes more than 80% of total coke production. More detailed information on this sector of consumption is given in the chapter on the iron and steel industry. The Community's blast-furnace coke requirements are likely to drop back to 87 million metric tons in 1975 after the peak of almost 82 million metric tons reached in 1974.

TABLE 16

Blast furnace coke consumption by sector — Community of the Nine

(in 1 000 metric tons)

	1973 Actual	1974 Estimates	1975 Forecasts	1974/73 %	1975/74 %
Iron and steel industry	64 307	66 750	64 270	+ 3.8	— 3.7
Other industries	6 400	6 125	5 970	— 4.3	— 2.5
Domestic heating	7 719	7 295	6 790	— 5.5	— 6.9
Others	1 450	1 625	1 335	+ 12.0	— 17.9
Total	79 876	81 795	78 365	+ 2.4	— 4.2

2. DEVELOPMENT OF INTERNAL DEMAND
BY SECTOR

(a) Thermal power stations

As a result of the oil crisis and savings made by consumers, internal consumption of electrical energy (1 063 TWh) increased by only 3% in 1974 compared with 1973. Gross production in 1975 is estimated at 1 134 TWh representing an increase of 6.7%.

A breakdown by methods of production for all power stations in the Community in 1975 is as follows, assuming average precipitation and temperature conditions:

Conventional thermal	81.7%
Hydroelectric	11.2%
Nuclear	6.9%
Geothermal	0.2%

Thus, the share of nuclear energy should increase to almost 7% of total production, leading to a reduction in the share of thermal power stations which will, however, still produce almost 80% of all electricity generated. The installed generating capacity of thermal power stations should continue to increase in absolute terms.

The table in Annex 4 covering the period 1972 to 1974 gives details of each country's plant, distinguishing between single-fuel coal-fired power stations, multi-fuel stations able to burn coal for short-term adjustments in supply policy to be possible depending on the relative costs and the degree of security of supply of the respective fuels.

Table 17 shows the relative consumption of fuels in thermal power stations over the three-year period. It is likely that more coal and correspondingly less oil products will be consumed in 1975.

TABLE 17

Relative consumption of fuels in thermal power stations in the Community

(in %)

	1973 Actual	1974 Estimates	1975 Forecasts
Coal	38.2	36.7	37.3
Lignite	10.1	10.9	10.8
Oil products	35.9	33.7	32.5
Natural gas	11.4	14.1	14.8
Other products	4.4	4.6	4.6
Total	100.0	100.0	100.0

Absolute figures for thermal power station consumption are more revealing as long as the situation in each country is examined separately. For example, the total Community figure includes that for the United Kingdom which was affected by strikes at the beginning of 1974. Annex 5 contains a detailed country-by-country breakdown of consumption of the various forms of energy in thermal power stations.

In the United Kingdom, the amount of coal consumed in thermal power stations (66.5 million tce) in 1975 should be more than four million tce greater than in 1973, this increase corresponds to a drop in oil consumption. In Germany, there should be a slight fall in coal consumption but an increase in lignite

and particularly natural gas consumption in the three-year period.

Some increase in coal consumption is expected in France, and a greater increase in Belgium where the relative share of coal in total fuel consumption should reach its target of 30%. No significant change in coal consumption is likely in the other countries.

A three-year period is too short to give a clear picture of the medium-term trend of coal consumption in thermal power stations, especially as this period includes 1974 when there were severe fuel supply difficulties and energy-saving measures which affected consumption were introduced.

TABLE 18

Solid fuel consumption in thermal power stations

(in 1 000 tce)

	1973	1974 Estimates	1975 Forecasts	1974/73 %	1975/74 %
Belgium					
Coal	1 926	2 645	3 415	+ 37.3	+ 29.1
Denmark					
Coal	2 593	2 450	2 500	- 5.5	+ 2.0
Germany					
Coal	35 631	35 800	34 000	+ 0.5	- 5.0
Lignite	27 583	29 655	31 585	+ 7.5	+ 6.5

(in 1 000 tce)

	1973	1974 Estimates	1975 Forecasts	1974/73 %	1975/74 %
France					
Coal	8 976	9 485	9 950	+ 5.7	+ 4.9
Lignite	1 004	1 200	1 065	+ 19.5	- 11.3
Ireland					
Coal	35	35	35	—	—
Lignite + peat	856	900	975	+ 5.1	+ 8.3
Italy					
Coal	592	1 060	600	+ 79.1	- 43.4
Lignite	425	450	470	+ 5.9	+ 4.4
Luxembourg					
Coal	6	6	6	—	—
Netherlands					
Coal	607	385	150	- 36.6	- 61.0
United Kingdom					
Coal	62 226	56 670	66 500	- 8.9	+ 17.3
Community					
Coal	112 592	103 536	117 156	- 3.6	+ 7.9
Lignite	29 868	32 205	34 095	+ 7.8	+ 5.9

Coal consumption in 1973 amounted to 112.6 million tce, eight million tce of which (i.e. 7%) were imported from non-member countries. In 1972, these imports totalled 9.5 million tce; the reduction is attributable to the fact that less coal was imported into the United Kingdom compared with the preceding year. Poland is by far the main source of steam coal supplies but other sources are becoming increasingly important.

Table 19 below gives the breakdown of supplies by origin and country of destination.

TABLE 19

Thermal power stations: coal supplies from non-member countries — Community of the Nine, 1973

Imports by country of origin

Country of origin	Quantity (million metric tons)	Percentage share in total coal consumption in this sector
Poland	5.8	5.2
USA	0.7	0.6
USSR	0.7	0.6
Australia	0.6	0.5
Other countries	0.2	0.2
Total Community	8.0	7.1

Imports by country of destination

Country of destination	Quantity (million metric tons)	Percentage share in total coal consumption in this sector
Belgium	0.2	11.0
Denmark	2.6	100.0
Germany	2.7	8.0
France	1.2	13.0
Ireland	—	—
Italy	0.6	100.0
Netherlands	0.2	33.0
United Kingdom	0.5	0.8
Total Community	8.0	7.1

(b) Iron and steel industry

Activity in the iron and steel industry remained brisk until October 1974 but in November there was a marked decline in activity throughout the Community, except in the United Kingdom where production was maintained at the October level. New orders flooded in during the first half of 1974 but in August there was an unseasonal drop in new orders and this trend continued in the following months. As usual, the downward trend was accompanied by a significant reduction in export prices. Still, in 1974,

despite the decline in activity at the end of the year, Community steel production reached 156 million metric tons. Activity in this industry is expected to pick up in the course of 1975. This will depend not only on the general economic situation but also on political factors connected with impending negotiations with the oil producers. In spite of this expected pick-up in activity, Community crude steel production is estimated at 151 million metric tons for the whole of the year, i.e. five million metric tons less than in the preceding year. Pig iron production is likely to fall below current forecasts if scrap iron remains in abundant supply.

TABLE 20

Pig iron production

	<i>(in 1 000 metric tons)</i>					
	1973	1974	1975 Forecasts		1974/73 %	1975/74 %
			Steel	Pig iron		
Belgium	12 767	13 250	15 500	12 600	+ 3.8	— 4.9
Denmark	—	—	400	—	—	—
Germany	36 828	40 200	50 000	37 700	+ 9.2	— 6.2
France	20 302	22 250	26 500	22 000	+ 9.6	— 1.2
Ireland	—	—	100	—	—	—
Italy	10 098	11 650	23 000	11 500	+ 15.4	— 1.3
Luxembourg	5 089	5 515	6 000	5 100	+ 8.4	— 7.5
Netherlands	4 707	4 800	5 500	4 600	+ 2.0	— 4.2
United Kingdom	17 067	14 200	24 000	15 100	— 16.8	+ 6.3
Community	106 858	111 865	151 000	108 600	+ 4.7	— 2.9

In 1974, specific coke input in blast furnaces varied according to the availability of fuel oil and blast furnace coke. The policy of increasing coke consumption in order to reduce fuel oil consumption in blast furnaces was followed only partially and was conditioned by the relative availability and prices of these two fuels. The level of fuel oil consumption in blast furnaces had to be maintained in certain countries because coke was not available in sufficient quantities and especially as the price per calorie of imported coking coals exceeded that of fuel oil in

many cases. In 1975, specific coke input is expected to fall, except in Italy where it will increase in blast furnaces because of the low quality of imported coking coal. Moreover, the considerable fall in specific coke input in Luxembourg in 1974 is a result of the entry into operation of a new iron ore sintering plant.

Average specific input in the Community in 1975 should be 528 kg compared with 533 kg in 1973.

TABLE 21

Specific coke input in blast furnaces

	<i>(kg per metric ton)</i>		
	1973 Actual	1974 Estimates	1975 Forecasts
Belgium	557	560	555
Germany	495	510	500
France	558	555	545
Italy	518	515	520
Luxembourg	601	520	515
Netherlands	476	480	480
United Kingdom	569	580	575
Community	533	534	528

The expected reduction in pig iron production should lead to a parallel reduction in the Community's coking coal requirements which are estimated at 64.27 million metric tons, i.e. 2.5 million metric tons less than in the preceding year; this should alleviate the severe strain on the market which was evident in the first half of 1974. As a result of less intensive activity in the iron and steel industry, the supply of coking coal should be more secure in 1975 even though producers' stocks of coking coal and coke in Germany will be almost completely exhausted.

TABLE 22
Consumption of blast furnace coke in the iron and steel industry

(in 1000 metric tons)

	1973 Actual	1974 Estimates	1975 Forecasts	1974/73 %	1975/74 %
Belgium	7 935	8 125	7 775	+ 2.4	— 4.3
Denmark	65	65	65	—	—
Germany	21 075	23 550	21 500	+ 11.7	— 8.7
France	12 208	13 300	12 875	+ 8.9	— 3.2
Ireland	10	10	10	—	—
Italy	5 817	6 630	6 625	+ 14.0	— 0.1
Luxembourg	3 294	3 115	2 855	— 5.4	— 8.3
Netherlands	2 446	2 515	2 415	+ 2.8	— 4.0
United Kingdom	11 459	9 440	10 150	— 17.6	+ 7.5
Community	64 307	66 750	64 270	+ 3.8	— 3.7

(c) Domestic heating

No valid conclusions about the trend in consumption can be made by comparing the figures for deliveries of solid fuels to households in the three-year period considered. The figures for 1974 are distorted by the oil crisis, the first effect of which was to slow down and in some cases to stop the process of conversion from coal to fuel oil.

This was compounded by a large increase in the price of oil products, which in certain regions exceeded even the price of graded sizes of anthracites. In addition, consumption fell as a result of the mild winter and possibly to some extent because of efforts on the part of consumers to save fuel.

The end result of these contradictory factors is expected to be another drop in consumption in 1975 compared with 1973 throughout the Community. The yearly reduction rate is estimated at 5% for the Community as a whole.

TABLE 23
Deliveries of solid fuels for domestic heating — Community
(including concessionary coal)

(in millions tce)

	1973 Actual	1974 Estimates	1975 Forecasts	1974/73 %	1975/74 %
Coal	27.9	24.9	24.9	— 10.8	—
Briquettes	7.4	6.7	6.4	— 8.4	— 5.0
Oven coke	7.7	7.3	6.8	— 5.5	— 6.9
Gas coke	1.6	1.6	1.2	— 1.9	— 25.6
Brown coal briquettes and peat	4.9	4.5	4.6	— 8.1	+ 2.3
Total	49.5	45.0	43.9	— 9.1	— 2.5

A detailed country-by-country breakdown of deliveries of solid fuel for domestic heating (including

concessionary coal) for the three-year period 1973 to 1975 is given in the table in Annex 6.

(d) Other sectors*Various industries*

These industries, excluding power stations, consume only 21 million metric tons, i.e. 7% of the Community's total internal consumption. Coal consumption accounts for 15 million metric tons and blast furnace coke, six million metric tons. In terms of tonnage, this consumption is significant only in the case of the United Kingdom's coal balance-sheet in which it represents 8.3% of total consumption, and to a lesser extent in France and Germany. The chemical industry is the main coal consumer in this sector.

The estimates for 1974 take account of deliveries made but exclude the demand factor as in many cases producers could not meet the requirements of manufacturers wishing to use coal in preference to other forms of energy simply because the coal was not available.

Table 24 indicates the general drop in consumption between 1973 and 1975; however, the rate of reduction in coal consumption in this sector recorded in preceding years has slowed down considerably as a result of the change in energy supply conditions. Only in the United Kingdom is there expected to be an increase in consumption; the forecasts for 1975 are slightly higher than the actual figures for the two preceding years.

TABLE 24

Coal and blast furnace coke consumption in the various industries ⁽¹⁾

(not including power stations)

(in 1000 metric tons)

	1973 Actual	1974 Estimates	1975 Forecasts	1974/73 %	1975/74 %
Belgium	850	890	875	+ 4.7	— 1.7
Denmark	20	20	20	—	—
Germany	5 260	4 600	4 000	— 12.5	— 13.0
France	3 680	3 485	3 460	— 5.3	— 0.7
Ireland	100	100	80	—	— 20.0
Italy	900	840	780	— 6.7	— 7.1
Luxembourg	20	25	25	+ 25.0	—
Netherlands	265	250	250	— 5.7	—
United Kingdom	10 870	9 940	11 200	— 8.6	+ 12.7
Community	21 965	20 150	20 690	— 8.3	+ 12.7

⁽¹⁾ Blast furnace coke assigned a value of unity.

V. BLAST FURNACE COKE PRODUCTION — PRODUCTION CAPACITY AND COAL REQUIREMENTS OF COKE-OVENS

Blast furnace coke production in the Community in 1974 rose to meet the high level of demand in the iron and steel industry in all countries. Production exceeded the level recorded in 1973 except in the United Kingdom where there were strikes. Forecasts for 1975 suggest a total figure for blast furnace coke production in the Community of 81.4 million metric tons. The decline compared to 1974 is not very marked because in that year 5.6 million metric tons of coke held in stock were run down and because normal production will be resumed in the United Kingdom in 1975.

TABLE 25
Blast furnace coke production

(in 1 000 metric tons)

	1973 Actual	1974 Estimates	1975 Forecasts	1974/73 %	1975/74 %
Belgium	7 773	8 050	7 500	+ 3.6	— 6.8
Denmark	—	—	—	—	—
Germany	33 997	35 000	33 500	+ 2.9	— 4.3
France	11 881	12 400	13 150	+ 4.4	+ 6.5
Ireland	—	—	—	—	—
Italy	7 668	8 350	8 100	+ 8.9	— 3.0
Luxembourg	—	—	—	—	—
Netherlands	2 655	2 800	2 700	+ 5.5	— 3.6
United Kingdom	17 776	15 900	16 500	— 10.5	+ 3.8
Community	81 750	82 500	81 450	+ 0.9	— 1.3

The coking capacities forecast for 1975 suggest a further decline in colliery coke oven capacity in Germany and an increase in the iron and steel industry coke oven capacity in Germany and France; in the case of France, part of the increase will be in coastal coking plants. The coking capacity of coastal coking plants in all the Community countries, except in the United Kingdom, should therefore amount to almost 20 million metric tons in 1975, i.e. almost double the figure recorded five years earlier. More than half of the coastal coking plant capacity is in Italy.

TABLE 26
Blast furnace coke production capacity

(in millions of metric tons)

	Belgium	Germany	France	Italy	Netherlands	Community of the Six	United Kingdom
1965							
Colliery coke ovens	1.2	38.1	8.9	—	3.2	51.4	..
Iron and steel industry coke ovens	5.3	8.5	4.4	3.7	1.2	23.1	..
Independent coke ovens	0.7	—	—	2.4	0.7	3.8	..
Total	7.2	46.6	13.3	6.1	5.1	78.3	..
Of which coastal coking plants	0.7	0.3	—	6.1	1.9	9.0	..
1970							
Colliery coke ovens	0.1	31.5	9.0	—	—	40.6	..
Iron and steel industry coke ovens	7.0	8.3	5.3	4.7	1.3	26.6	..
Independent coke ovens	0.3	—	—	2.5	0.7	3.5	..
Total	7.4	39.8	14.3	7.2	2.0	70.7	..
Of which coastal coking plants	0.3	0.3	1.0	7.2	2.0	10.8	..
1975							
Colliery coke ovens	—	27.6	7.2	—	—	34.8	4.1
Iron and steel industry coke ovens	8.0	9.1	6.9	8.3	2.4	34.7	11.6
Independent coke ovens	0.5	—	—	2.5	0.7	3.7	3.6
Total	8.5	36.7	14.1	10.8	3.1	73.2	19.3
Of which coastal coking plants	1.6	0.5	3.9	10.8	3.1	19.9	..

It is too early to forecast the sources of the coking plants' supplies in 1975, but mention must be made of a special annual quota of three million metric tons of coking coal to be imported into Germany. The graph given opposite shows the share of national coal, coal from other Community countries and coal imported from non-member countries in the supplies to coking plants in each Community country in 1974.

Table 27, which indicates the origin of coal supplies to coke ovens for the three years 1972 to 1974, shows various trends and in particular the general decline

in the use of national coal; Germany, where the use of national coal increased, is an exception. Trade within the Community increased, but as this was due principally to the running down of existing stocks in Germany, this trend will probably not continue.

Finally, there has been a substantial increase in imports of coking coal from non-member countries, which rose to almost 19 million metric tons in 1974, as against only 13 million metric tons five years earlier.

TABLE 27

Origin of coal supplies to coke ovens — deliveries

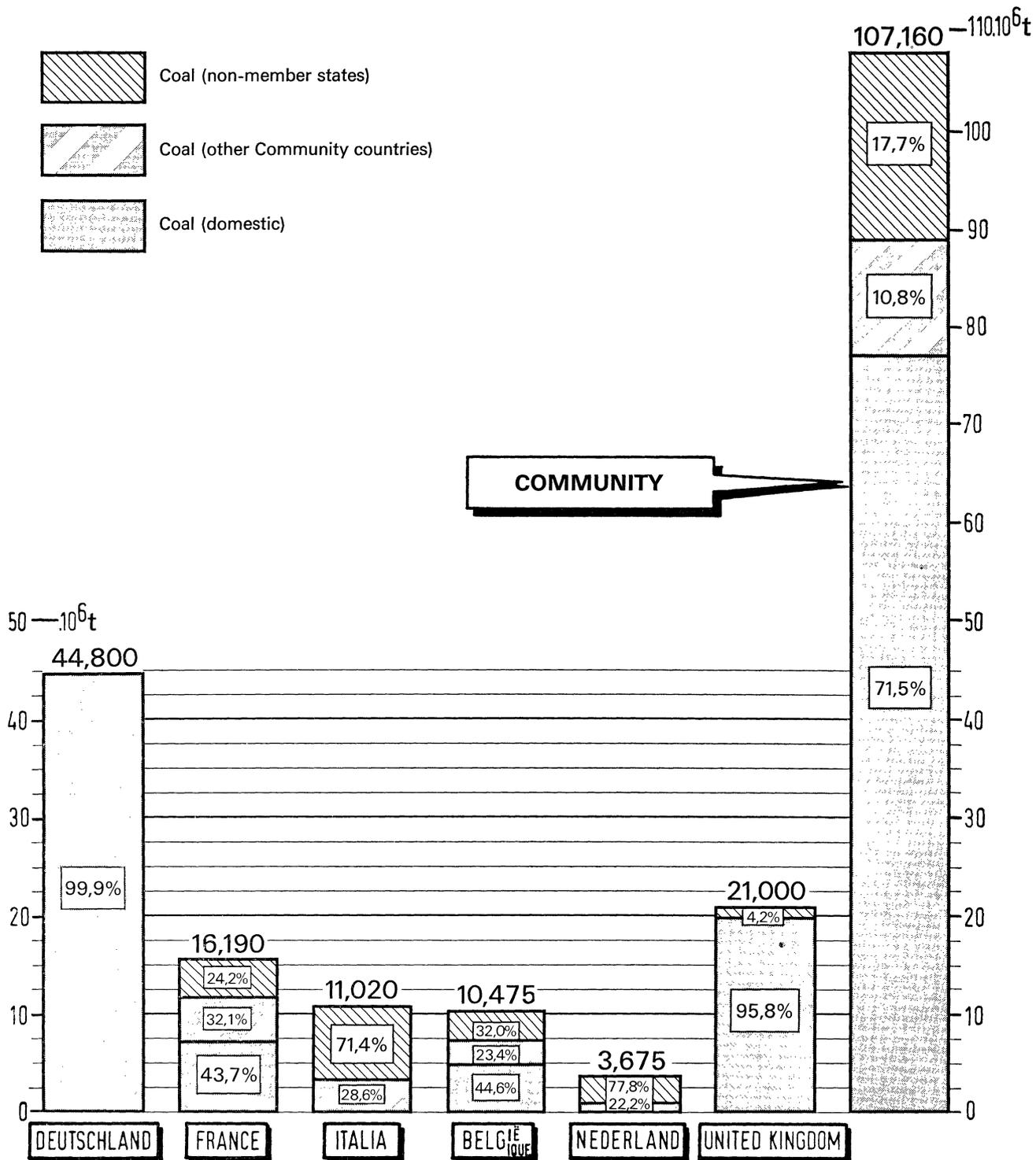
(in millions of metric tons)

	Community of the Nine		
	1972	1973	1974
National coal production	81.5	80.8	76.6
Coal from other ECSC countries	8.2	9.4	11.6
Total — Community coal	89.7	90.2	88.2
Coal from non-member countries	15.2	17.0	18.9
Total supplies	104.9	107.2	107.1

The table in Annex 7 gives the detailed breakdown of supplies to coke ovens in each member country during the three years 1972 to 1974 (domestic production, coal from other Community countries and from non-member countries).

The United States remains the principal supplier, but Poland's sales are increasing and reached some five million metric tons in 1974. Australia is also expanding its markets in Europe, mainly in the Community.

**COKING PLANT COAL SUPPLIES ACCORDING TO SOURCE
COMMUNITY - ESTIMATES 1974**



VI. TRADE WITHIN THE COMMUNITY

During the three years in question, trade within the Community rose to a maximum in 1974 because the stocks which had accumulated in Germany in the preceding period of surplus had been run down. Deliveries from Germany represent approximately 80% of total trade, as indicated in Table 28, which shows trade within the Community in coal and furnace coke.

TABLE 28

Trade within the Community in coal and furnace coke

(in 1 000 metric tons)

	Coal			Blast furnace coke		
	1973	1974	1975	1973	1974	1975
TOTAL	18 294	18 965	17 905	9 028	9 655	8 185
— including exports from Germany	13 372	15 500	14 300	7 246	7 910	6 545
(a) to France	5 935	6 685	5 990	2 987	3 850	2 780
(b) to Luxembourg	226	490	600	3 143	3 010	2 735
(c) to Belgium	3 282	4 250	3 780	378	470	325
— including exports from United Kingdom	2 560	1 435	2 545	78	295	200

Together with the other countries, the United Kingdom will probably return to its rate of deliveries recorded in 1973. The restrictions on exports to both Community countries and to non-member countries, which were introduced on 18 February 1974 following the labour disputes in the coal industry, were lifted with effect from 21 January 1975. Finally, there will be a reduction in deliveries from France as a result of the overall run down of production, and from the Netherlands where the last pit was closed on 1 January 1975. In the case of blast furnace coke, only deliveries from Germany will show any substantial change, as a result of stocks being run down in 1974. A country-by-country breakdown of trade within the Community coal and blast furnace coke from 1973 to 1975 is given in the tables in Annexes 8 and 9.

VII. PRODUCERS' STOCKS OF COAL AND BLAST FURNACE COKE

The run down of producers' stocks which began in 1973 continued on a large scale in 1974: in one year 6.8 million metric tons of coal and 5.5 million metric tons of coke, i.e. 14 million tce, were used up in Germany. In addition, five million metric tons were drawn from stocks in the United Kingdom and one million metric tons in France, so that the total for the entire Community was 20 million tce. The Community is expected to build up its stocks again to a small extent in 1975, as the United Kingdom's plan to build up reserve stocks of two million metric tons will more than offset the continuing run down of stocks in Germany.

In Germany however, if there is a much greater downswing in the iron and steel industry than forecast, stocks, particularly of blast furnace coke, might be built up again.

TABLE 29
Producers' stocks of coal and coke

(in 1 000 tce)

	Belgium	Germany	France	Ireland	Italy	Netherlands	United Kingdom	Community
<i>Late 1973</i>								
Coal	170	8 987	2 390	18	—	439	9 117	21 121
Coke ⁽¹⁾	252	9 542	652	—	932	6	2 921	14 305
Total (a)	422	18 529	3 042	18	932	445	12 038	35 426
<i>Late 1974</i>								
Coal	220	2 410	1 690	20	—	—	4 582	8 922
Coke ⁽¹⁾	323	2 313	346	—	932	6	2 304	6 224
Total (b)	543	4 723	2 036	20	932	6	6 886	15 146
<i>Late 1975</i>								
Coal	220	2 245	1 705	20	—	—	5 987	10 177
Coke ⁽¹⁾	323	1 540	372	—	1 004	64	2 850	6 153
Total (c)	543	3 785	2 077	20	1 004	64	8 837	16 330
Difference (a-b) and (b-c)	+ 121 —	— 13 806 — 938	— 1 006 + 41	+ 2 —	— + 72	— 439 + 58	— 5 152 + 1 951	— 20 280 + 1 184

⁽¹⁾ Value in terms of coal equivalent: factor 1.3.

A point to be noted is that once again producers' stocks accumulated during a period of surplus have been used to help to supply the market during the ensuing boom, particularly in the iron and steel industry, and in the present situation have helped to soften the initial impact of the oil crisis. It is also remarkable that the complete run-down of stocks always coincides with a reversal in the economic situation, so that disruption of supplies is avoided. This cyclical phenomenon has now occurred five times (1951, 1957, 1963, 1970 and 1974) during the past 25 years and has given rise to no major problems. Nevertheless, it is hazardous to extrapolate

from past experiences and to conclude that the situation will remain the same in the future.

1975 figures for each Community country are to be found as follows:

Annex 10: Balance of supply and demand: hard coal (national statistics).

Annex 12: Balance of supply and demand: coke oven coke.

Annex 14: Balance of supply and demand: patent fuel.

CONCLUSION

The oil supply difficulties encountered over a year ago have had an enormous effect on the role of coal in the Community; the quadrupling of the price of oil made a large part of Community coal production competitive at world energy market prices. However, if Community coal is to maintain this role, it will be necessary to moderate the rise in costs of production and to promote increased productivity to offset an

least a part of the wage increase in this labour-intensive industry.

All the Community countries have revised their policy in order to encourage the use of coal, but always within the confines of what is economically reasonable. The Community target of maintaining an annual production level of 250 million tce is based on an

increase in production in Germany and in the United Kingdom. To maintain production at this level, capital investment and a suitable work force will be required. It is evident that in such cases there is always a time lapse between the decisions taken and the appropriate result. However, a halt, or at least a slowing down in the pace of contraction in production is to be expected, all the more so as present conditions of economic recession encourage recruitment.

Investment and recruitment of skilled manpower require stable sales of Community coal and a stocking policy destined to compensate cyclical fluctuations in demand.

During 1974, stocks of coal in the Community have avoided interruptions in supplies especially in the coking coal sector, interruptions which would have been inevitable considering the heavy demand on the world coal market. The running down of stocks has enabled the iron and steel industry to meet large export orders to third countries and has also allowed a reduction in oil imports primarily destined for power stations. This has benefited the Community's balance of payments.

At the present time, supplementary availability ex production stocks can be considered as virtually exhausted.

The safety margin is weakened by the low level of stocks but unless there are unforeseen complications in the supply networks, ability to cover demand should be assured, particularly in the case of the iron and steel industry where there is currently a reduced level of activity. A marked reduction in this activity could even lead to a reconstruction of production stocks of coke.

In general terms, a level of economic activity lower than that originally forecast, can only lead to a reduction in the demand for coal.

In the case of power stations, the key factor in the role of coal in a new energy supply strategy, the demand for coal depends on short-term requirements which can take little account of the long-term need to replace fuel oil by coal. In a number of cases, there is still not an overwhelming commitment in favour of coal. Imports of coal from non-member countries for power stations are still insignificant, amounting to under 10 million metric tons a year.

Because of the time-lag inherent in opening collieries and creating transport infrastructures and loading and discharging facilities at ports, it will be some time before new contracts can be signed.

Consequently, 1975 is likely to be a year of transition and the effects of new coal supply policies will be felt to only a small extent. As the Community coal mining industry, and to a lesser extent that of non-member countries, lacks flexibility, the benefits of a new supply policy will not be felt immediately. However, there should be an increased tendency for Community undertakings, including collieries, to participate financially in foreign collieries.

Throughout the world, new sources of coal supplies are likely to emerge in regions known to contain deposits but which are not yet involved in the export market and about which the parties concerned are still quite rightly exercising a certain amount of discretion. It is too early to attempt to quantify the amount of coal which could be made available to consumers a few years hence if projects being studied were to take practical shape. Although the quantities of coal involved will be useful in meeting demand for energy they will still be very small in relation to oil.

ANNEX 1

Gross internal energy consumption by country and by form of energy (primary sources)
1973*(in 1 000 tce)*

	Coal	Lignite peat	Oil	Natural gas	Primary electricity	Other fuels	Total
Belgium	16 229	19	39 784	10 466	— 159	39	66 378
Denmark	3 585	—	25 892	—	— 61	—	29 416
Germany	85 767	32 304	208 571	39 245	11 879	1 030	378 796
France	40 196	1 370	176 894	19 774	18 915	294	257 443
Ireland	843	1 632	8 006	—	267	—	10 748
Italy	10 959	493	139 701	20 711	13 824	330	186 018
Luxembourg	3 540	31	2 392	283	980	4	7 230
Netherlands	4 017	13	41 936	41 491	— 76	—	87 381
United Kingdom	114 243	—	154 593	36 552	11 673	—	317 061
Community	279 379	35 862	797 769	168 522	57 242	1 697	1 340 471

ANNEX 2

Listed pithead prices for Community coal at 15 January 1974, 1 July 1974 and 15 January 1975

(in national currencies/metric ton)

Categories	Types	Date	Ruhr (DM)	Aachen (DM)	Saar (DM)	Belgium (Bfrs)	Nord (FF)	Lorraine (FF)	South Wales (£)	Scottish (£)	North Yorkshire (£)
Anthracite	Nuts 3 (20/30 mm) (1½" × ¾")	15. 1. 1974	161·00	—	—	2 357	207·00	—	18·45	—	—
		1. 7. 1974	191·00	—	—	2 850	292·50	—	21·41	—	—
		15. 1. 1975	207·00	—	—	3 125	292·50	—	25·34	—	—
Lean coal	Nuts 3 (20/30 mm) (1½" × ¾")	15. 1. 1974	151·00	137·00	—	2 012	—	—	14·57	—	—
		1. 7. 1974	181·50	165·00	—	2 700	—	—	17·52	—	—
		15. 1. 1975	199·00	198·00	—	2 970	—	—	21·06	—	—
Semi-bituminous	Nuts 4 (10/20 mm) (¾" × ¾")	15. 1. 1974	116·50	120·00	—	1 425	—	—	9·65	—	—
		1. 7. 1974	137·50	148·00	—	2 125	—	—	12·40	—	—
		15. 1. 1975	155·00	173·00	—	2 390	—	—	14·86	—	—
Long flame	Nuts 2 (30/50 mm) (2" × 1")	15. 1. 1974	107·00	—	118·00	1 350	145·00	132·00	9·94	10·63	7·68
		1. 7. 1974	126·10	—	142·00	2 050	198·50	184·00	12·80	13·78	11·52
		15. 1. 1975	145·50	—	163·00	2 450	198·50	184·00	15·35	17·32	14·86
Long flame	Nuts 5 (6/10 mm) (¾" × ¼")	15. 1. 1974	107·00	—	112·00	1 350	139·00	113·00	—	9·89	6·94
		1. 7. 1974	126·10	—	133·00	2 050	194·50	160·00	—	12·80	10·33
		15. 1. 1975	145·50	—	154·00	2 450	194·50	160·00 ⁽²⁾	—	16·14	13·39
Coking coal	Medium or high volatile	15. 1. 1974	108·70	102·00	113·50	1 300	180·00	180·00	11·17	11·37	7·97
		1. 7. 1974	127·90	125·00	138·00	2 000	275·00	253·00	14·27	14·57	11·81
		15. 1. 1975	158·00	155·00	172·50	2 500	360·00	310·00	20·08	19·19	16·04
Coke	Blast furnace > ½" > 40 mm	15. 1. 1974	164·50	157·00	181·50	2 200 ⁽¹⁾	275·00	300·00	19·59	20·08	19·59
		1. 7. 1974	201·00	194·00	221·00	3 300	412·50	412·50	27·21	27·71	27·21
		15. 1. 1975	246·00	237·00	276·00	4 300	530·00	461·00	36·56	35·58	35·09

⁽¹⁾ Zeebrugge large graded coke.
⁽²⁾ Power stations: 232·90 to 241·56.

ANNEX 3

Listed pithead prices for Community coal at 15 January 1974, 1 July 1974 and 15 January 1975

Categories	Types	Date	Ruhr	Aachen	Saar	Belgium	Nord	Lorraine	South Wales	Scottish	North Yorkshire	Extreme prices		% Difference	
												lowest	highest		
Anthracite	Nuts 3 20/30 mm 3/4" — 1 1/2"	15. 1. 1974	56.75	—	—	54.65	41.32	—	40.58	—	—	—	40.58	56.75	40
		1. 7. 1974	74.76	—	—	74.97	60.65	—	51.13	—	—	—	51.13	74.76	47
		15. 1. 1975	85.50	—	—	86.04	65.55	—	59.21	—	—	—	59.21	86.04	45
Lean coal	Nuts 3 20/30 mm 1 1/16" — 2 1/4"	15. 1. 1974	53.23	48.29	—	46.65	—	—	32.04	—	—	—	32.04	53.23	66
		1. 7. 1974	71.04	64.58	—	71.03	—	—	41.85	—	—	—	41.85	71.04	70
		15. 1. 1975	82.20	81.78	—	81.77	—	—	49.20	—	—	—	49.20	82.20	67
Semi-bituminous	Nuts 4 10/20 mm 0 — 1"	15. 1. 1974	41.06	42.30	—	33.04	—	—	21.21	—	—	—	21.21	42.30	99
		1. 7. 1974	57.82	57.93	—	55.90	—	—	29.63	—	—	—	29.63	57.93	96
		15. 1. 1975	64.02	71.46	—	65.80	—	—	34.72	—	—	—	34.72	71.46	106
Long flame	Nuts 2 30 — 50 mm 1" — 2"	15. 1. 1974	37.72	—	—	31.30	28.94	26.35	18.29	23.38	16.88	16.88	16.88	41.59	146
		1. 7. 1974	49.35	—	—	53.93	41.16	38.15	30.56	32.91	27.51	27.51	27.51	55.58	102
		15. 1. 1975	60.10	—	—	67.46	44.49	41.24	35.87	40.47	34.72	34.72	34.72	67.46	94
Long flame	Nuts 5 6/10 mm 0 — 1"	15. 1. 1974	37.72	—	—	31.30	27.74	22.56	—	21.75	15.26	15.26	15.26	39.48	159
		1. 7. 1974	49.35	—	—	53.93	40.33	33.18	—	30.56	24.69	24.69	24.69	53.93	118
		15. 1. 1975	60.10	—	—	67.46	43.59	35.86(4)	—	37.71	31.27	31.27	31.27	67.46	116
Coking coal	Medium or (5) high volatile	15. 1. 1974	38.32	35.95	40.01(3)	30.14	35.93	35.93(3)	24.57	25.00(3)	17.53(3)	17.53	17.53	40.01	128
		1. 7. 1974	50.06	48.92	54.01	52.61	57.02	52.46	34.08	34.79	28.21	28.21	28.21	57.02	102
		15. 1. 1975	65.26	64.02	71.25	68.83	80.68	69.48	46.91	44.83	37.48	37.48	37.48	80.68	115
Coke	Blast furnace > 1/2" > 40 mm	15. 1. 1974	57.98	55.34	63.98	51.59	54.89	59.88	43.07	44.15	43.07	43.07	43.07	63.98	49
		1. 7. 1974	78.67	75.93	86.50	86.15	85.54	85.54	85.54	65.00	66.18	65.00	65.00	86.50	33
		15. 1. 1975	101.61	97.89	114.00	118.39	118.78	103.32	85.42	83.12	81.97	81.97	81.97	118.78	45

(1) Dollar exchange rate:

DM	Index	Bfrs	Index	FF	Index	£	Index
15. 1. 1974:	2.837	43.1325	100	5.01	100	0.45	100
28. 6. 1974:	2.555	90	88	4.8225	96	0.42	93
2. 1. 1975:	2.421	85	84	4.462	89	0.43	96

(2) Prices are not adjusted for quality differences.

(3) High volatile.

(4) For power stations = 52.20 to 54.14 \$ per metric ton.

ANNEX 4

Equipment of conventional power plants — installed capacity

	(1 000 Mwe)									
	Belgium	Denmark	Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Community
<i>End 1973</i>										
Single fuel coal-fired power plants of which: public utilities	1.4 0.9	. 0.8	17.5 10.4	5.8 2.8	. 0.0	0.1 —	— —	. 1.0	. 46.6	. 62.5
Multi fuel power plants of which: public utilities	2.3 1.2	. 1.9	10.7 6.7	6.3 4.6	. 0.1	8.1 7.8	0.0 —	. 1.4	. 3.6	. 27.3
Other power plants	4.3	.	26.7	13.3	.	13.9	0.2	.	.	.
Total	8.0	5.7	54.9	25.4	1.7	22.1	0.2	12.5	70.0	200.5
<i>End 1974 (estimate)</i>										
Single fuel coal-fired power plants of which: public utilities	1.4 0.9	. 0.8	17.5 10.4	5.8 2.8	. 0.0	0.1 —	— —	. 0.8	. 47.4	. 63.1
Multi fuel power plants of which: public utilities	2.3 1.2	. 1.9	10.7 6.7	6.3 4.6	. 0.1	8.1 7.8	0.0 —	. 1.4	. 3.6	. 27.3
Other power plants	4.6	.	33.0	14.8	.	16.1	0.2	.	.	.
Total	8.3	6.3	61.2	26.9	1.7	24.3	0.2	13.6	71.1	213.6
<i>End 1975 (provisional)</i>										
Single fuel coal-fired power plants of which: public utilities	1.3 0.9	. 0.8	17.5 10.4	5.8 2.8	. 0.0	0.1 —	— —	. 0.6	. 48.4	. 63.9
Multi fuel power plants of which: public utilities	2.4 1.2	. 1.9	10.6 6.6	6.3 4.6	. 0.1	8.1 7.8	0.0 —	. 1.4	. 3.6	. 27.2
Other power plants	4.9	.	37.2	15.5	.	16.9	0.2	.	.	.
Total	8.6	6.3	65.3	27.6	1.9	25.1	0.2	15.2	72.8	223.0

ANNEX 5

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

	1973		1974		1975	
	tce	%	tce	%	tce	%
<i>Belgium</i>						
Coal	1 926	13.9	2 645	18.4	3 415	24.2
Lignite	—	—	—	—	—	—
Oil products	7 142	51.7	5 935	41.3	5 020	35.5
Natural gas	3 266	23.7	4 295	29.9	4 220	29.9
Other fuels	1 474	10.7	1 505	10.4	1 480	10.4
Total	13 808	100.0	14 380	100.0	14 135	100.0
<i>Denmark</i>						
Coal	2 593	38.6	2 450	36.4	2 500	36.2
Lignite	—	—	—	—	—	—
Oil products	4 126	61.4	4 275	63.6	4 405	63.8
Natural gas	—	—	—	—	—	—
Other fuels	—	—	—	—	—	—
Total	6 719	100.0	6 725	100.0	6 905	100.0
<i>Germany</i>						
Coal	35 631	38.2	35 800	36.6	34 000	33.4
Lignite	27 583	29.5	29 655	30.3	31 585	31.0
Oil products	13 730	14.7	11 315	11.6	11 115	10.9
Natural gas	11 083	11.9	15 345	15.7	19 200	18.9
Other fuels	5 335	5.7	5 720	5.8	5 920	5.8
Total	93 362	100.0	97 835	100.0	101 820	100.0
<i>France</i>						
Coal	8 976	23.8	9 485	25.2	9 950	25.3
Lignite	1 004	2.7	1 200	3.2	1 065	2.7
Oil products	22 088	58.5	21 460	56.9	22 825	57.9
Natural gas	2 985	7.9	2 890	7.7	2 270	5.8
Other fuels	2 681	7.1	2 670	7.0	3 300	8.3
Total	37 734	100.0	37 705	100.0	39 410	100.0
<i>Ireland</i>						
Coal	35	1.4	35	1.3	35	1.2
Lignite	856	33.1	900	32.5	975	32.7
Oil products	1 698	65.5	1 835	66.2	1 975	66.1
Natural gas	—	—	—	—	—	—
Other fuels	—	—	—	—	—	—
Total	2 589	100.0	2 770	100.0	2 985	100.0

	1973		1974		1975	
	tce	%	tce	%	tce	%
<i>Italy</i>						
Coal	592	1.9	1 060	3.2	600	1.7
Lignite	425	1.3	450	1.4	470	1.3
Oil products	27 627	87.4	28 465	85.9	30 390	85.5
Natural gas	1 463	4.6	1 475	4.5	2 285	6.4
Other fuels	1 506	4.8	1 680	5.0	1 785	5.1
Total	31 613	100.0	33 130	100.0	35 530	100.0
<i>Luxembourg</i>						
Coal	6	1.0	6	1.1	6	1.1
Lignite	—	—	—	—	—	—
Oil products	159	25.2	115	20.7	100	18.0
Natural gas	59	9.3	85	15.3	100	18.0
Other fuels	407	64.5	350	62.9	350	62.9
Total	631	100.0	556	100.0	556	100.0
<i>Netherlands</i>						
Coal	607	3.6	385	2.3	150	0.8
Lignite	—	—	—	—	—	—
Oil products	2 285	13.6	2 385	14.0	2 570	14.4
Natural gas	13 388	79.6	13 675	80.3	14 535	81.5
Other fuels	549	3.2	595	3.4	595	3.3
Total	16 829	100.0	17 040	100.0	17 850	100.0
<i>United Kingdom</i>						
Coal	62 226	68.2	56 670	66.2	66 500	69.8
Lignite	—	—	—	—	—	—
Oil products	26 751	29.3	23 945	27.9	23 815	25.0
Natural gas	1 350	1.5	4 070	4.8	4 085	4.3
Other fuels	887	1.0	930	1.1	930	0.9
Total	91 214	100.0	85 615	100.0	95 330	100.0
<i>Community</i>						
Coal	112 592	38.2	108 536	36.7	117 156	37.3
Lignite	29 868	10.1	32 205	10.9	34 095	10.8
Oil products	105 606	35.9	99 730	33.7	102 215	32.5
Natural gas	33 594	11.4	41 835	14.1	46 695	14.8
Other fuels	12 839	4.4	13 450	4.6	14 360	4.6
Total	294 499	100.0	295 756	100.0	314 521	100.0

ANNEX 6

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

(in 1 million tce)

	1973	1974 Provisional	1975 Estimates	1974/73 %	1975/74 %
<i>Belgium</i>	3.3	3.3	3.1	— 0.5	— 4.6
Of which: coal	2.7	2.8	2.6	+ 1.8	— 4.3
briquettes	0.5	0.4	0.4	— 10.9	— 9.8
coke	0.1	0.1	0.1	— 18.5	+ 13.3
<i>Denmark</i>	0.2	0.2	0.1	— 22.3	— 6.7
<i>Germany:</i>	12.7	12.3	11.5	— 3.2	— 6.3
Of which: coal	2.3	2.2	2.1	— 3.9	— 4.5
briquettes	2.1	2.1	1.9	— 0.8	— 12.8
coke	4.4	4.4	3.9	+ 1.4	— 11.3
lignite	3.9	3.5	3.6	— 9.4	+ 2.9
<i>France</i>	8.7	8.0	7.6	— 7.3	— 5.9
Of which: coal	4.7	4.2	3.8	— 10.2	— 9.5
briquettes	3.3	3.1	3.1	— 4.5	— 1.8
coke	0.5	0.5	0.5	+ 4.9	— 1.0
lignite	0.2	0.2	0.2	— 12.6	— 5.1
<i>Ireland</i>	1.4	1.4	1.5	+ 2.8	+ 2.5
Of which: coal	0.7	0.7	0.7	+ 4.3	+ 2.9
peat and briquettes	0.7	0.7	0.8	+ 1.5	+ 2.0
<i>Italy</i>	0.8	0.6	0.6	— 21.6	— 1.7
Of which: coal	0.2	0.3	0.3	+ 22.2	—
coke	0.5	0.3	0.3	— 43.2	— 3.9
<i>Luxembourg</i>	0.1	0.1	0.1	— 14.9	—
<i>Netherlands</i>	0.5	0.2	0.2	— 58.1	— 18.2
<i>United Kingdom</i>	22.0	19.1	19.3	— 13.4	+ 1.4
Of which: coal	16.8	14.5	15.1	— 13.7	+ 4.5
briquettes	1.4	1.1	1.1	— 25.6	+ 2.4
coke	3.8	3.5	3.1	— 7.7	— 11.4
<i>Community</i>	49.5	45.0	43.9	— 9.1	— 2.5
Of which: coal	27.9	24.9	24.9	— 10.8	—
briquettes	7.4	6.7	6.4	— 8.4	— 5.0
coke	9.3	8.9	8.0	— 4.9	— 10.2
lignite and peat	4.9	4.5	4.6	— 8.1	+ 2.3

ANNEX 7

Coking plant supplies

(in 1 000 metric tons)

	Domestic production	Coal from other Community countries	Total Community coal	Coal from non-member countries	Total supplies
<i>Belgium</i>					
1972	5 659	1 258	6 917	2 446	9 363
1973	5 110	1 833	6 943	2 981	9 924
1974	4 675	2 450	7 125	3 350	10 475
<i>Germany</i>					
1972	44 623	—	44 623	84	44 707
1973	43 805	—	43 805	34	43 839
1974	44 750	—	44 750	50	44 800
<i>France</i>					
1972	8 967	3 861	12 828	2 336	15 164
1973	8 750	3 897	12 647	2 602	15 249
1974	7 080	5 200	12 280	3 910	16 190
<i>Italy</i>					
1972	3	2 720	2 723	7 210	9 933
1973	—	2 730	2 730	7 655	10 385
1974	—	3 150	3 150	7 870	11 020
<i>Netherlands</i>					
1972	1	396	397	1 987	2 384
1973	—	712	712	2 722	3 434
1974	—	815	815	2 860	3 675
<i>United Kingdom</i>					
1972	22 150	11	22 161	1 189	23 350
1973	23 168	200	23 368	1 000	24 368
1974	20 110	—	20 110	890	21 000
<i>Total</i>					
1972	81 403	8 246	89 649	15 252	104 901
1973	80 833	9 372	90 205	16 994	107 199
1974	76 615	11 615	88 230	18 930	107 160

ANNEX 8

Trend of intra-Community exchanges: hard coal

(in 1 000 metric tons)

Receipts in	Belgium	Denmark	Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total receipts
<i>Belgium</i>										
1973	—	—	3 282	146	—	—	—	516	153	4 097
1974	—	—	4 250	125	—	—	—	370	325	5 070
1975	—	—	3 780	75	—	—	—	—	490	4 345
<i>Denmark</i>										
1973	—	—	1	—	—	—	—	—	2	3
1974	—	—	—	—	—	—	—	—	—	—
1975	—	—	5	—	—	—	—	—	5	10
<i>Germany</i>										
1973	241	—	—	597	—	—	—	281	1 531	2 650
1974	330	—	—	370	20	—	—	380	300	1 400
1975	240	—	—	340	—	—	—	—	800	1 380
<i>France</i>										
1973	85	—	5 935	—	—	—	—	338	539	6 897
1974	75	—	6 685	—	—	—	—	290	490	7 540
1975	235	—	5 990	—	—	—	—	100	750	7 075
<i>Ireland</i>										
1973	—	—	16	—	—	—	—	4	100	120
1974	—	—	20	—	—	—	—	—	90	110
1975	—	—	25	—	—	—	—	—	75	100
<i>Italy</i>										
1973	—	—	2 815	33	—	—	—	—	37	2 885
1974	—	—	3 130	10	—	—	—	—	60	3 200
1975	—	—	3 400	25	—	—	—	—	25	3 450
<i>Luxembourg</i>										
1973	1	—	226	31	—	—	—	5	—	263
1974	5	—	490	5	—	—	—	—	—	500
1975	—	—	600	5	—	—	—	—	—	605
<i>Netherlands</i>										
1973	16	—	926	6	—	—	—	—	198	1 146
1974	25	—	850	—	—	—	—	—	170	1 045
1975	35	—	300	5	—	—	—	—	400	740
<i>United Kingdom</i>										
1973	—	—	171	3	—	—	—	59	—	233
1974	—	—	75	—	—	—	—	25	—	100
1975	—	—	200	—	—	—	—	—	—	200
<i>Total loadings</i>										
1973	343	—	13 372	816	—	—	—	1 203	2 560	18 294
1974	435	—	15 500	510	20	—	—	1 065	1 435	18 965
1975	510	—	14 300	450	—	—	—	100	2 545	17 905

ANNEX 9

Trend of intra-Community exchanges: coke, ovencoke

(in 1 000 metric tons)

Receipts in	Belgium	Denmark	Germany	France	Ireland	Italy	Luxem- bourg	Nether- lands	United Kingdom	Total receipts
<i>Belgium</i>										
1973	—	—	378	340	—	—	—	243	19	980
1974	—	—	470	245	—	—	—	225	35	975
1975	—	—	325	300	—	—	—	250	150	1 025
<i>Denmark</i>										
1973	—	—	58	45	—	—	—	—	5	108
1974	—	—	40	50	—	—	—	—	5	95
1975	—	—	55	40	—	—	—	—	5	100
<i>Germany</i>										
1973	115	10	—	217	—	—	—	115	50	507
1974	70	—	—	180	—	—	—	70	170	490
1975	90	10	—	115	—	—	—	75	25	315
<i>France</i>										
1973	105	—	2 987	—	—	40	—	300	—	3 432
1974	100	—	3 850	—	—	—	—	330	20	4 300
1975	100	—	2 780	—	—	—	—	300	—	3 180
<i>Ireland</i>										
1973	—	—	1	3	—	—	—	—	4	8
1974	—	—	—	5	—	—	—	—	5	10
1975	—	—	—	—	—	—	—	—	10	10
<i>Italy</i>										
1973	—	—	24	40	—	—	—	—	—	64
1974	—	—	—	40	—	—	—	—	—	40
1975	—	—	50	—	—	—	—	—	—	50
<i>Luxembourg</i>										
1973	91	—	3 143	5	—	—	—	—	—	3 239
1974	100	—	3 010	5	—	—	—	—	—	3 115
1975	90	—	2 735	30	—	—	—	—	—	2 855
<i>Netherlands</i>										
1973	14	—	609	17	—	—	—	—	—	640
1974	20	—	540	10	—	—	—	—	60	630
1975	20	—	550	20	—	—	—	—	10	600
<i>United Kingdom</i>										
1973	4	—	46	—	—	—	—	—	—	50
1974	—	—	—	—	—	—	—	—	—	—
1975	—	—	50	—	—	—	—	—	—	50
<i>Total loadings</i>										
1973	329	10	7 246	667	—	40	—	658	78	9 028
1974	290	—	7 910	535	—	—	—	625	295	9 655
1975	300	10	6 545	505	—	—	—	625	200	8 185

ANNEX 10

Balance of supply and demand: hard coal, 1975

	(in 1 000 metric tons — national series)									
	Belgium	Denmark	Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Community
1. Production	8 200	—	95 000	23 000	50	—	—	—	134 100	260 350
2. Pitch for patent fuels + correction for recovered slurries	720	—	6 000	1 500	—	—	—	—	2 000	+ 10 220
3. Imports from third countries	4 460	3 000	7 000	10 430	750	8 425	—	3 235	2 900	40 200
4. Receipts from other ECSC countries	4 345	10	1 380	7 075	100	3 450	605	740	200	(17 905)
5. Total availabilities	17 725	3 010	109 380	42 005	900	11 875	605	3 975	139 200	310 770
6. Inland demand										
(a) Power stations at mines	740	—	11 000	6 390	—	—	—	—	—	18 130
(b) Public power stations	2 800	2 820	22 000	6 200	50	600	—	150	82 700	117 320
(c) Coking plants	9 800	—	43 600	17 100	—	10 600	—	3 525	23 500	103 125
(d) Iron and steel industry	200	20	1 300	2 300	—	30	565	—	350	4 765
(of which power stations)	(25)	(—)	(1 000)	(250)	(—)	(—)	(—)	(—)	(125)	(1 400)
(e) Other industries	590	20	8 200	2 200	80	180	25	50	11 200	22 545
(of which power stations)	(75)	(—)	(6 000)	(250)	(—)	(—)	(—)	(—)	(1 500)	(7 825)
(f) Domestic heating	2 500	50	1 500	3 600	700	270	15	150	12 900	21 685
(g) Issues to workers	150	—	600	200	—	—	—	—	2 250	3 200
(h) Patent fuel plants	335	—	2 000	3 100	—	25	—	—	1 000	6 460
(i) Own consumption at mines	70	—	1 000	375	—	—	—	—	1 200	2 645
(k) Gasworks	—	100	1 700	—	70	—	—	—	—	1 870
(l) Railways	10	—	600	25	—	170	—	—	50	855
(m) Others	—	—	750	—	—	—	—	—	—	750
Total	17 195	3 010	94 250	41 490	900	11 875	605	3 875	135 150	308 350
7. Exports to third countries	20	—	1 200	50	—	—	—	—	100	1 370
8. Deliveries to other ECSC countries	510	—	14 300	450	—	—	—	100	2 545	(17 905)
9. Total requirements	17 725	3 010	109 750	41 990	900	11 875	605	3 975	137 795	309 720
10. Producers' stocks (beginning)	244	—	2 372	3 252	20	—	—	—	5 979	11 867
11. Additions to/withdrawal	—	—	—370	+15	—	—	—	—	+1 405	+1 050
12. Producers' stocks (end)	244	—	2 002	3 267	20	—	—	—	7 384	12 917

ANNEX 11

Hard coal — intra-Community exchanges, 1975

(in 1 000 metric tons)

Exporter Importer	(in 1 000 metric tons)										Total imports
	Belgium	Denmark	Germany	France	Ireland	Italy	Luxem- bourg	Nether- lands	United Kingdom		
Belgium	—		3 780	75					490		4 345
Denmark		—	5						5		10
Germany	240		—	340					800		1 380
France	235		5 990	—				100	750		7 075
Ireland	—	—	25	—	—	—	—	—	75		100
Italy			3 400	25		—			25		3 450
Luxembourg			600	5			—				605
Netherlands	35		300	5				—	400		740
United Kingdom			200						—		200
Total exports	510		14 300	450				100	2 545		17 905

ANNEX 12

Balance of supply and demand: coke, ovencoke, 1975

(in 1 000 metric tons)

	Belgium	Denmark	Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Community
1. Production	7 500	—	33 500	13 150	—	8 100	—	2 700	16 500	81 450
2. Imports from third countries	100	20	600	—	—	25	—	—	20	765
3. Receipts from other ECSC countries	1 025	100	315	3 180	10	50	2 855	600	50	(8 185)
4. Total availabilities	8 625	120	34 415	16 330	10	8 175	2 855	3 300	16 570	82 215
5. Inland demand										
(a) Iron and steel industry	7 775	65	21 500	12 875	10	6 625	2 835	2 415	10 150	64 270
(b) Other industries	360	—	1 800	1 510	—	600	—	200	1 500	5 970
(c) Domestic users	70	45	2 000	400	—	240	—	5	3 100	5 860
(d) Miscellaneous:										
— issues to workers	15	—	800	110	—	5	—	—	(¹)	930
— own consumption	—	—	180	400	—	50	—	—	200	830
— railways	5	—	50	—	—	—	—	—	—	55
— others	—	—	250	—	—	—	—	—	200	450
Total	8 225	110	26 580	15 295	10	7 520	2 835	2 620	15 150	78 365
6. Exports to third countries	100	—	1 885	510	—	600	—	10	900	4 005
7. Deliveries to other ECSC countries	300	10	6 545	505	—	—	—	625	200	(8 185)
8. Total requirements	8 625	120	35 010	16 310	10	8 120	2 835	3 255	16 250	82 370
9. Producers' stocks (beginning)	249	—	1 779	266	—	717	—	4	1 772	4 787
10. Additions/withdrawal from producers' stock	—	—	— 595	+ 20	—	+ 55	—	+ 45	+ 320	— 155
11. Producers' stocks (end)	249	—	1 184	286	—	772	—	49	2 092	4 632

(¹) Included in domestic uses and shall consumers.

ANNEX 13

Coke, ovencoke — intra-Community exchanges, 1975

(in 1 000 metric tons)

Exporter											Total imports
	Belgium	Denmark	Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom		
Belgium	—	—	325	300	—	—	—	250	150	—	1 025
Denmark	—	—	55	40	—	—	—	—	5	—	100
Germany	90	10	—	115	—	—	—	75	25	—	315
France	100	—	2 780	—	—	—	—	300	—	—	3 180
Ireland	—	—	—	—	—	—	—	—	10	—	10
Italy	—	—	50	—	—	—	—	—	—	—	50
Luxembourg	90	—	2 735	30	—	—	—	—	—	—	2 855
Netherlands	20	—	550	20	—	—	—	—	10	—	600
United Kingdom	—	—	50	—	—	—	—	—	—	—	50
Total exports	300	10	6 545	505	—	—	—	625	200	—	8 185

ANNEX 14

Balance of supply and demand: patent fuel, 1975

	<i>(in 1 000 metric tons)</i>									
	Belgium	Denmark	Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Community
1. Production	340		2 100	3 200		25			1 000	6 665
2. Imports from third countries	—		—	—		—		—	—	—
3. Receipts from other ECSC countries	90		5	60		15		20	175	(365)
4. Total availabilities (1 to 3)	430		2 105	3 260		40		20	1 175	6 665
5. Inland demand										
(a) Own consumption	5		10	10		—		—	5	30
(b) Issues to workers	100		260	425		—		—	—	785
(c) Railways				25						25
(d) Other industries	10		20	5				5	75	115
(e) Domestic uses	270		1 585	2 645		40		15	1 075	5 630
(f) Miscellaneous			5	5						10
Total	385		1 880	3 115		40		20	1 155	6 595
6. Exports to third countries	5		50	5		—		—	10	70
7. Deliveries to other ECSC countries	40		175	140		—		—	10	(365)
8. Total requirements	430		2 105	3 260		40		20	1 175	6 665

ANNEX 15

Patent fuel — intra-Community exchanges, 1975

(in 1 000 metric tons)

	Exporter		Belgium	Denmark	Germany	France	Ireland	Italy	Luxembourg	Netherlands	United Kingdom	Total imports
	Importer	Importer										
Belgium	—	—	90									90
Denmark		—										
Germany		5	—									5
France		10	50		—							60
Ireland							—					
Italy			15					—				15
Luxembourg									—			
Netherlands		10								—	10	20
United Kingdom		15	20		140						—	175
Total exports		40	175		140						10	365

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