

EURACOAL

European Association
for Coal and Lignite



Global Coal: trends and outlook

13th European Round Table on Coal
“Surging Global Demand for Coal: what it means for the EU”
European Parliament

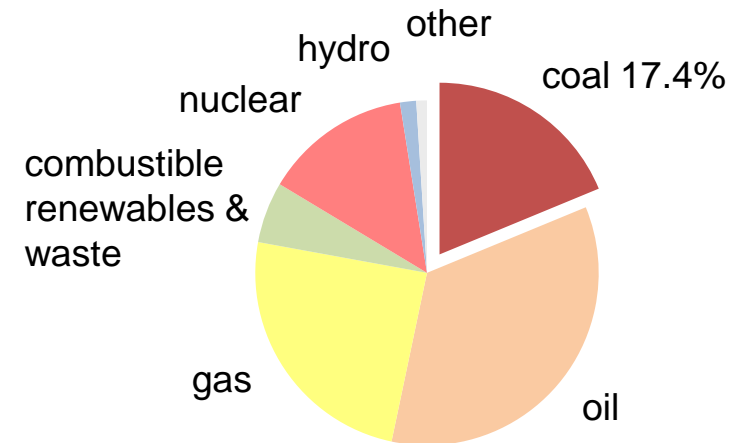
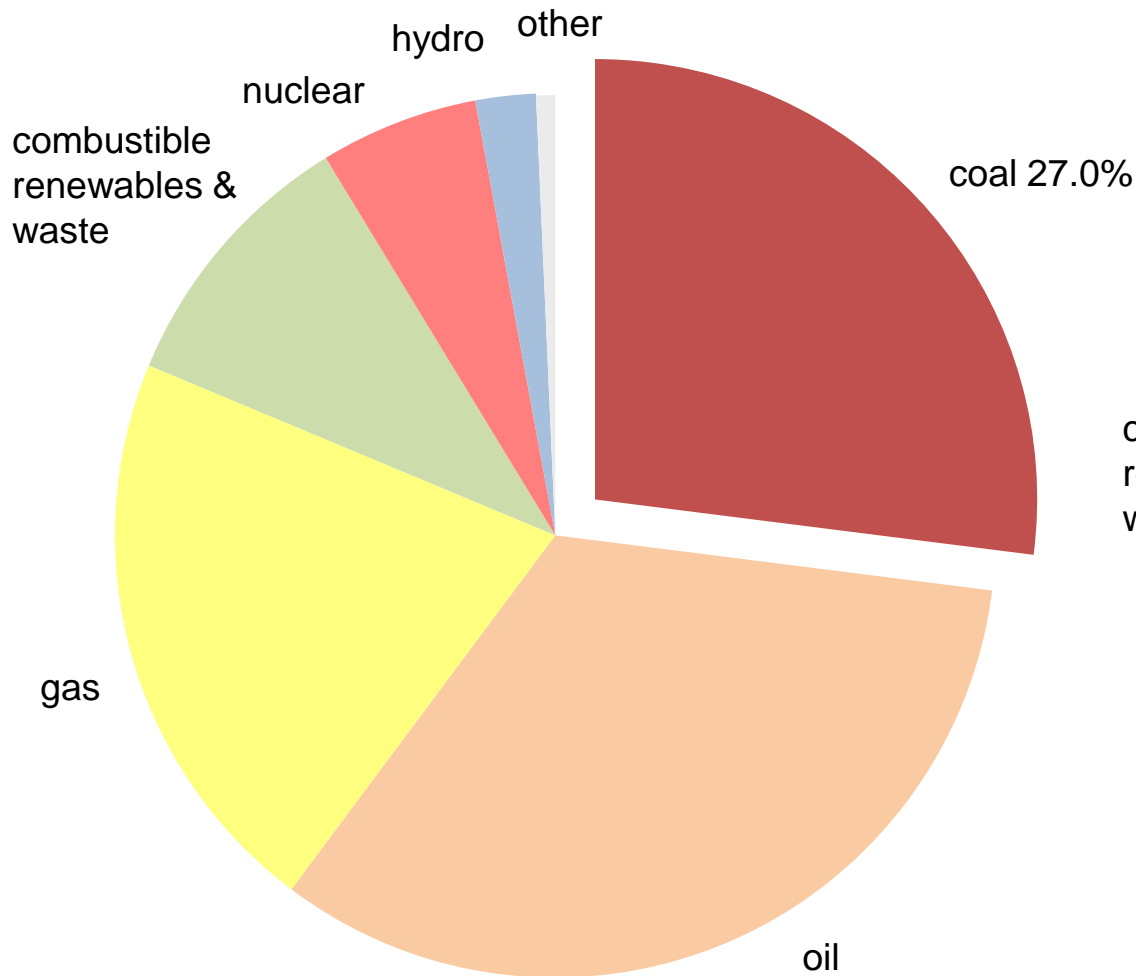
16 March 2011

Dr.-Ing. Hartmuth ZEISS – President EURACOAL
Chairman of the Managing Directors
Vattenfall Europe Mining AG &
Vattenfall Europe Generation AG

Coal in total primary energy supply, 2008

World: 12 267 Mtoe

EU-27: 1 751 Mtoe (14.3%)

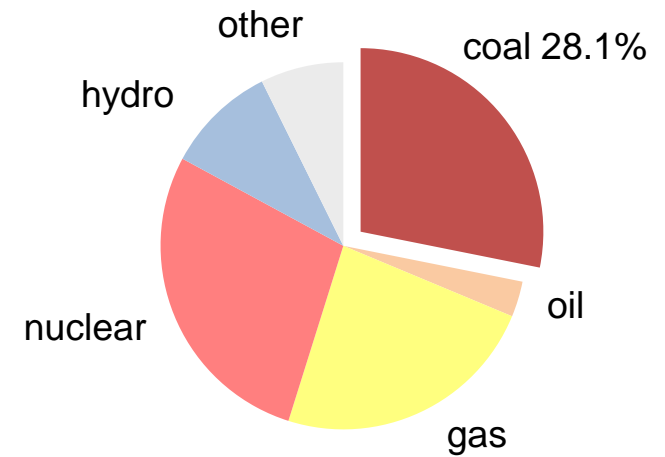
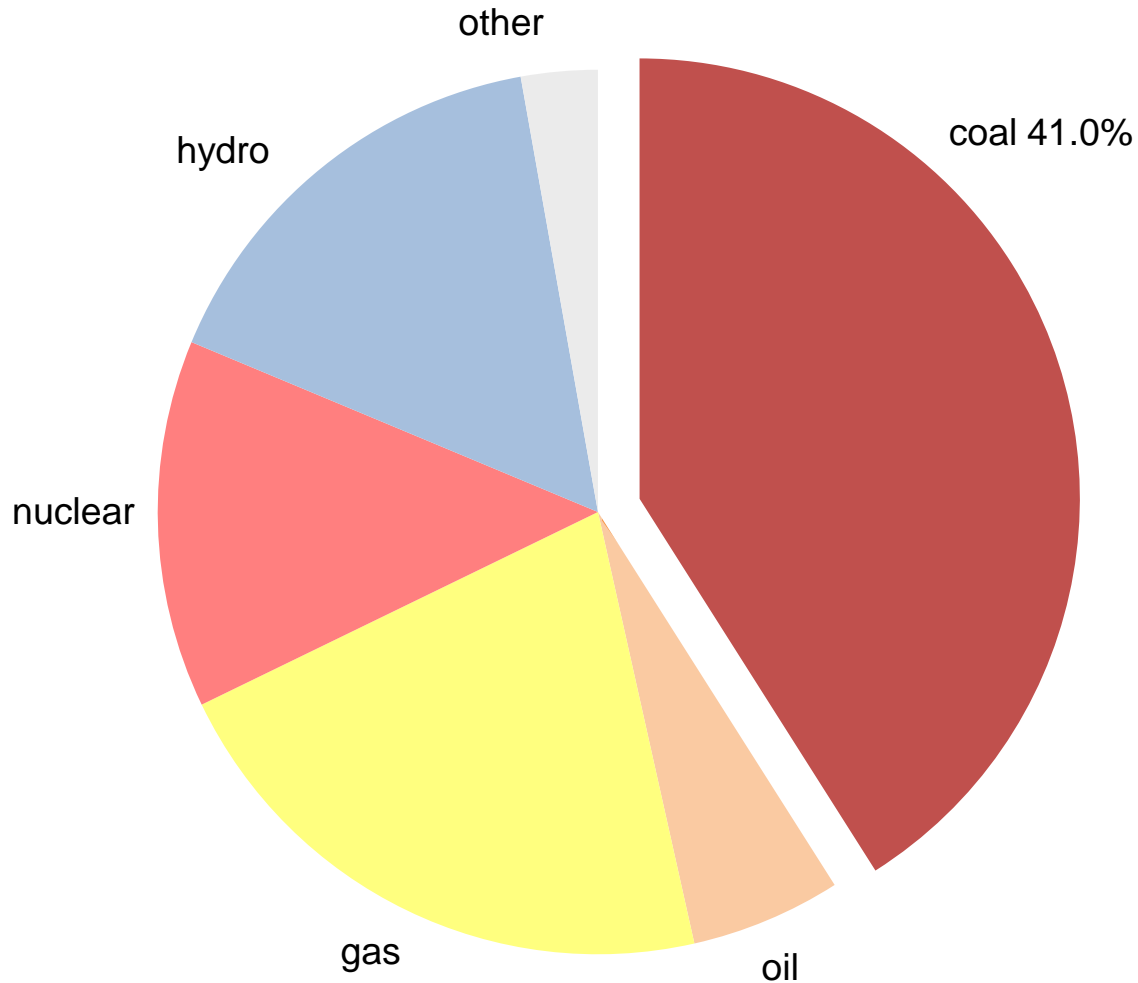


sources: IEA Key World Energy Statistics 2010 and IEA databases

Fuel sources for electricity generation, 2008

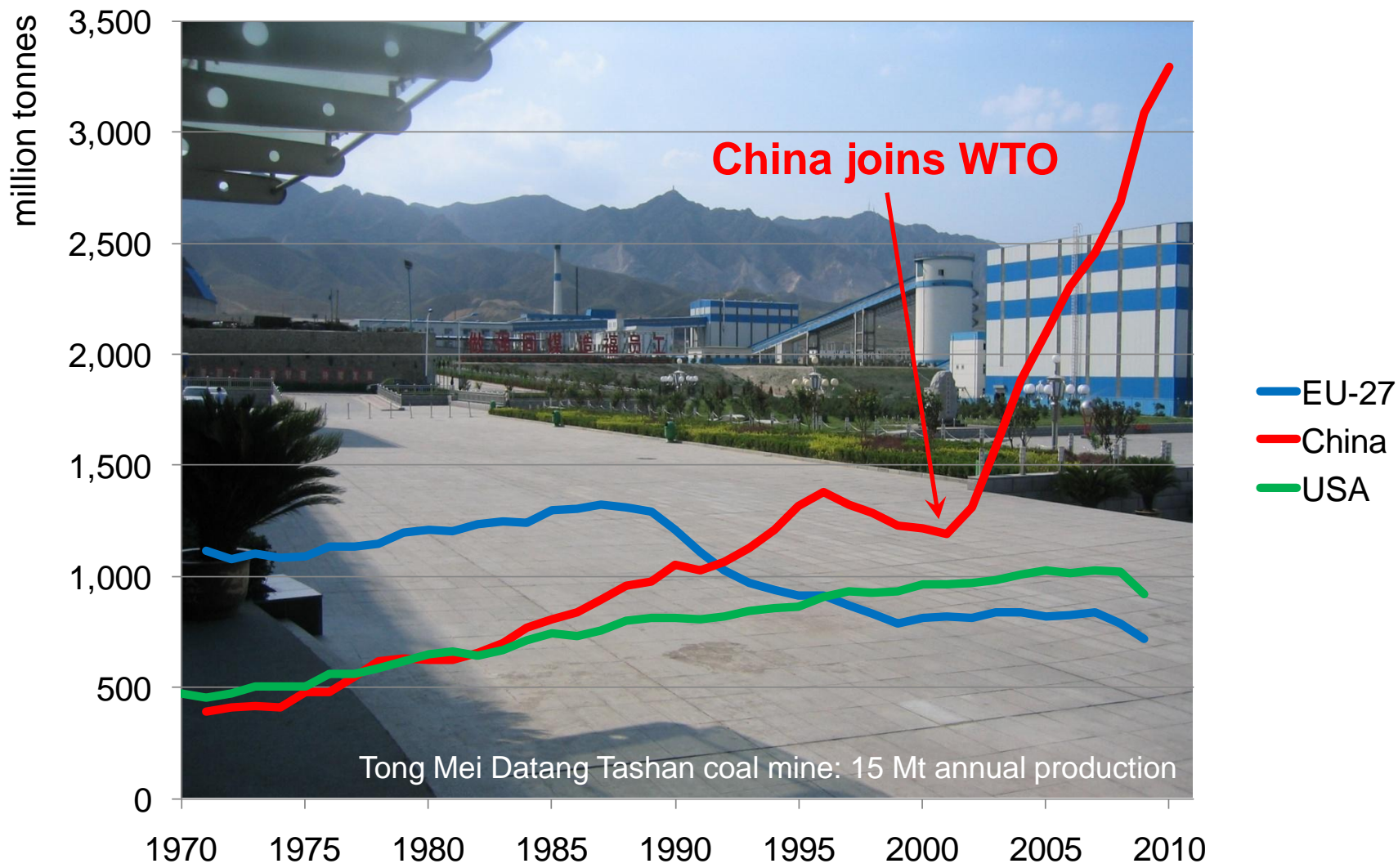
World: 20 181 TWh

EU-27: 3 341 TWh (16.6%)



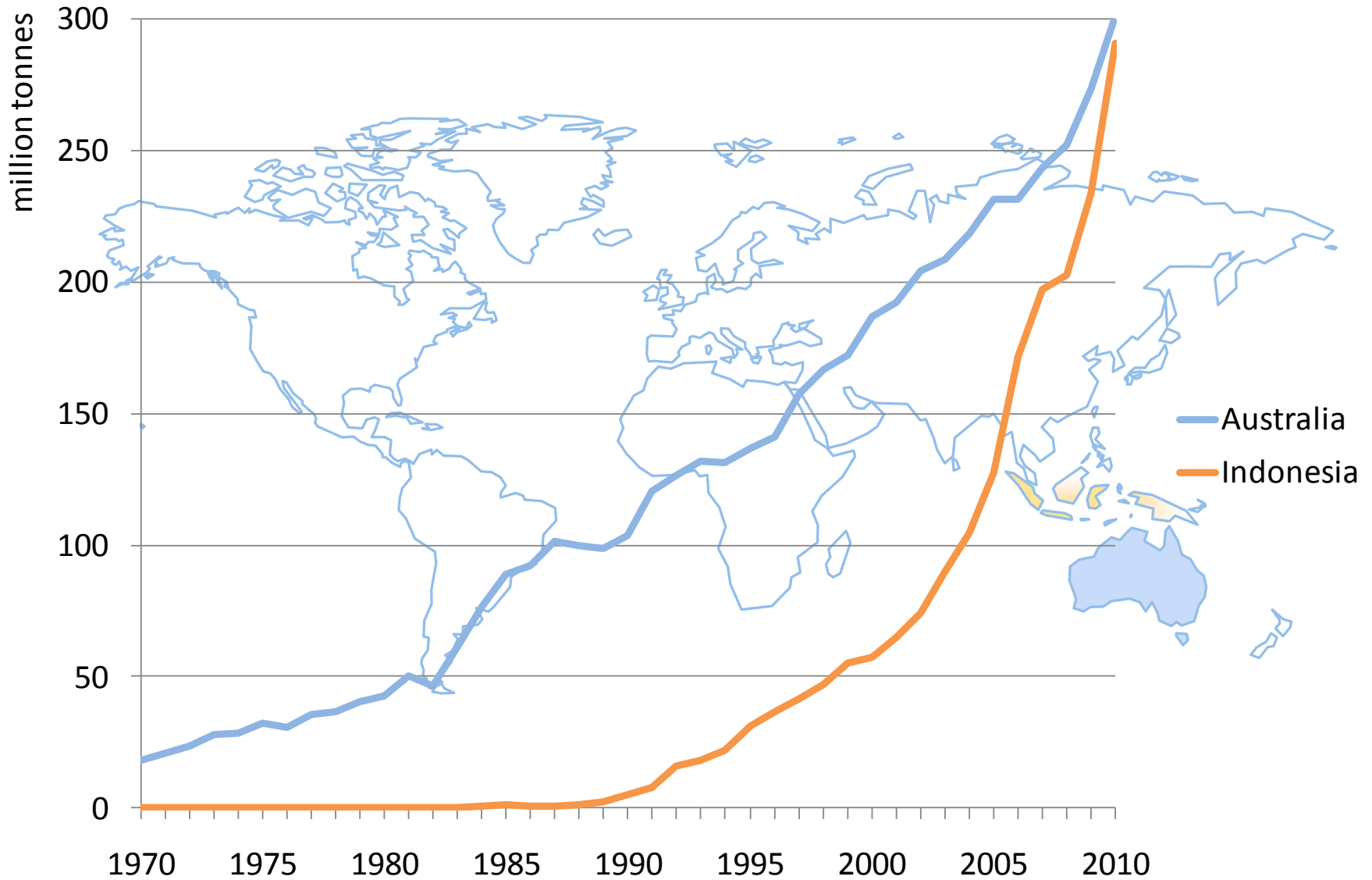
sources: IEA Key World Energy Statistics 2010 and IEA databases

Coal use in EU-27, China and USA, 1970-2010



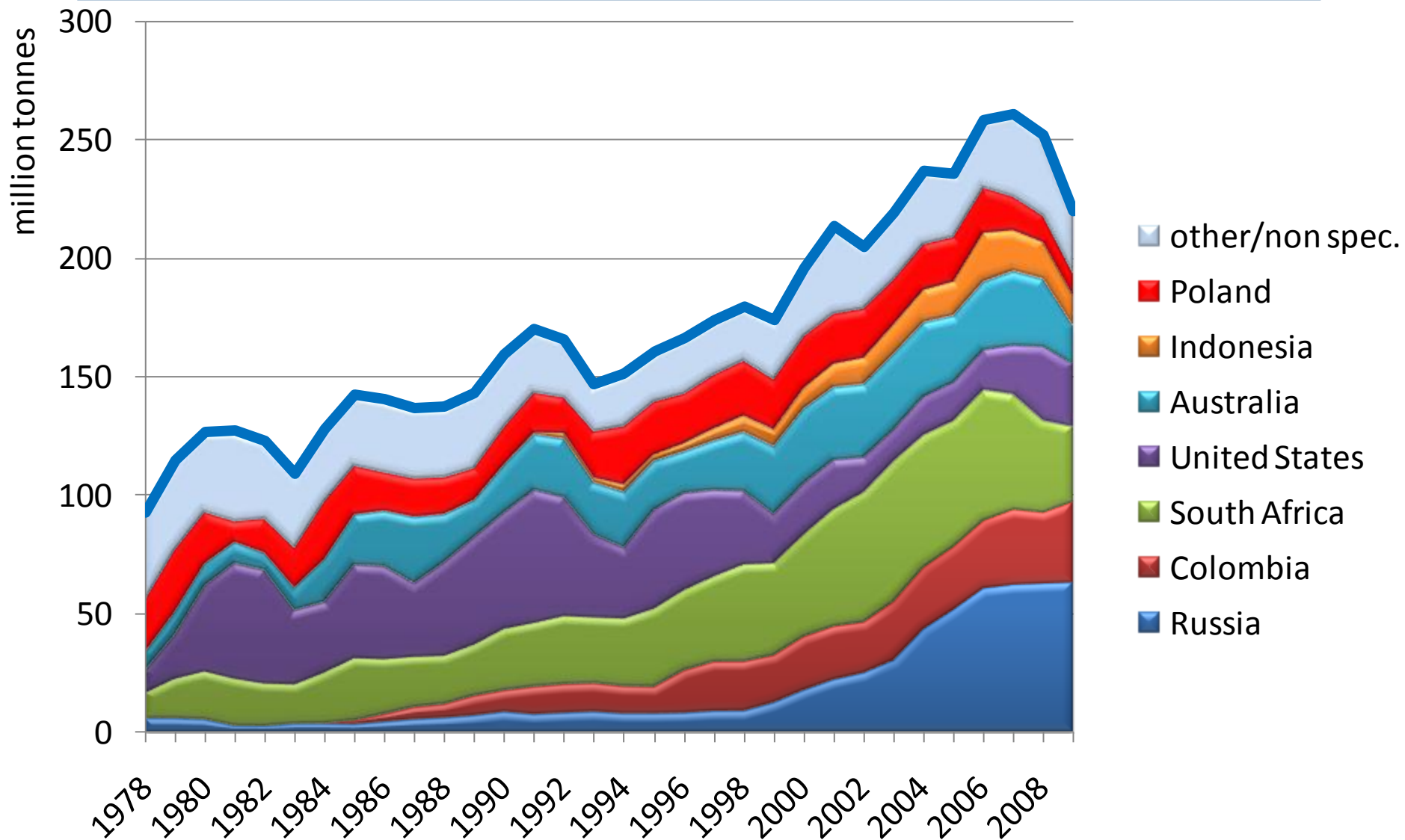
source: *Coal Information 2010*, OECD/IEA (with 2010 estimates)

Australian & Indonesian coal exports, 1970-2010



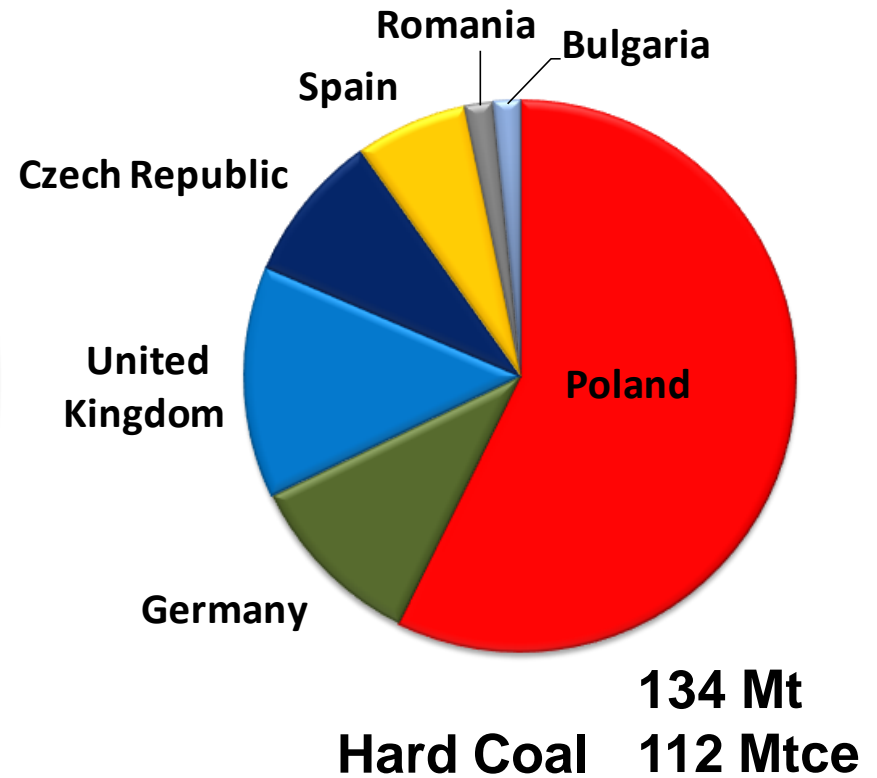
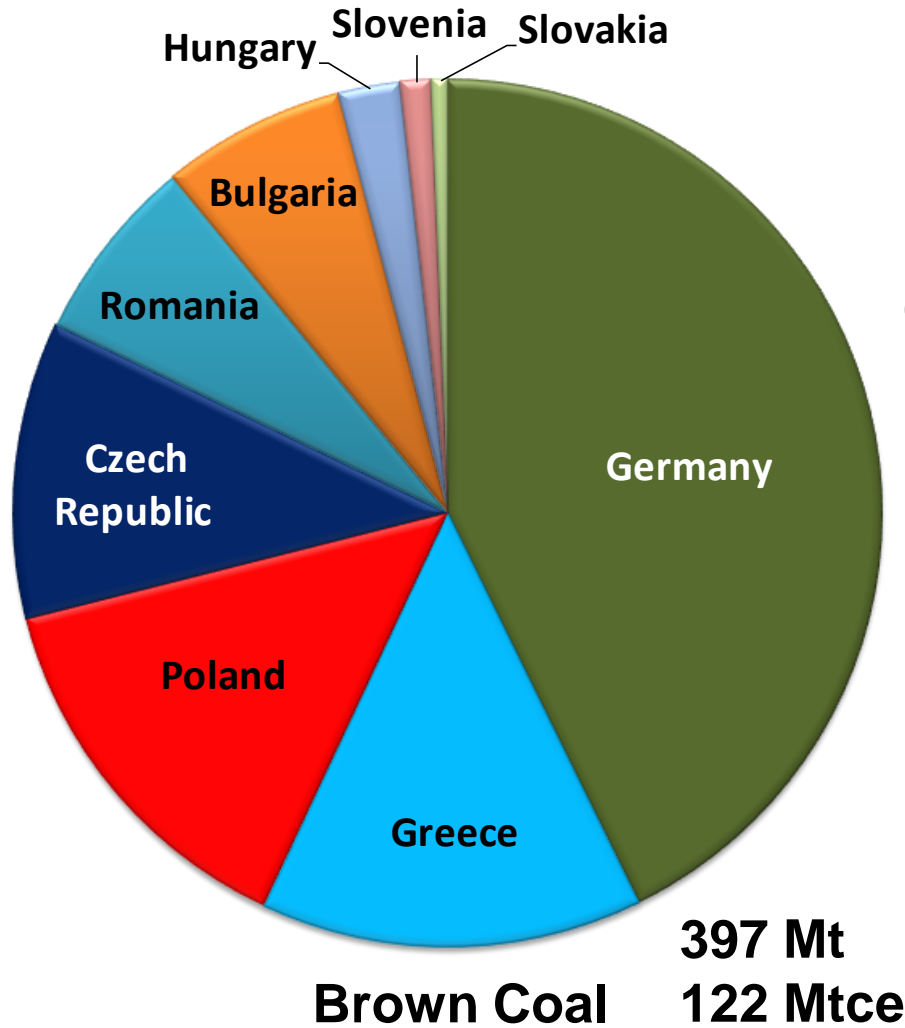
sources: IEA Coal Information 2010, OECD/IEA and McCloskey Coal Report, IHS McCloskey

EU-27 coal imports by origin, 1978-2009



sources: IEA Coal Information 2010, OECD/IEA and EUROSTAT databases

EU-27 indigenous coal production, 2010

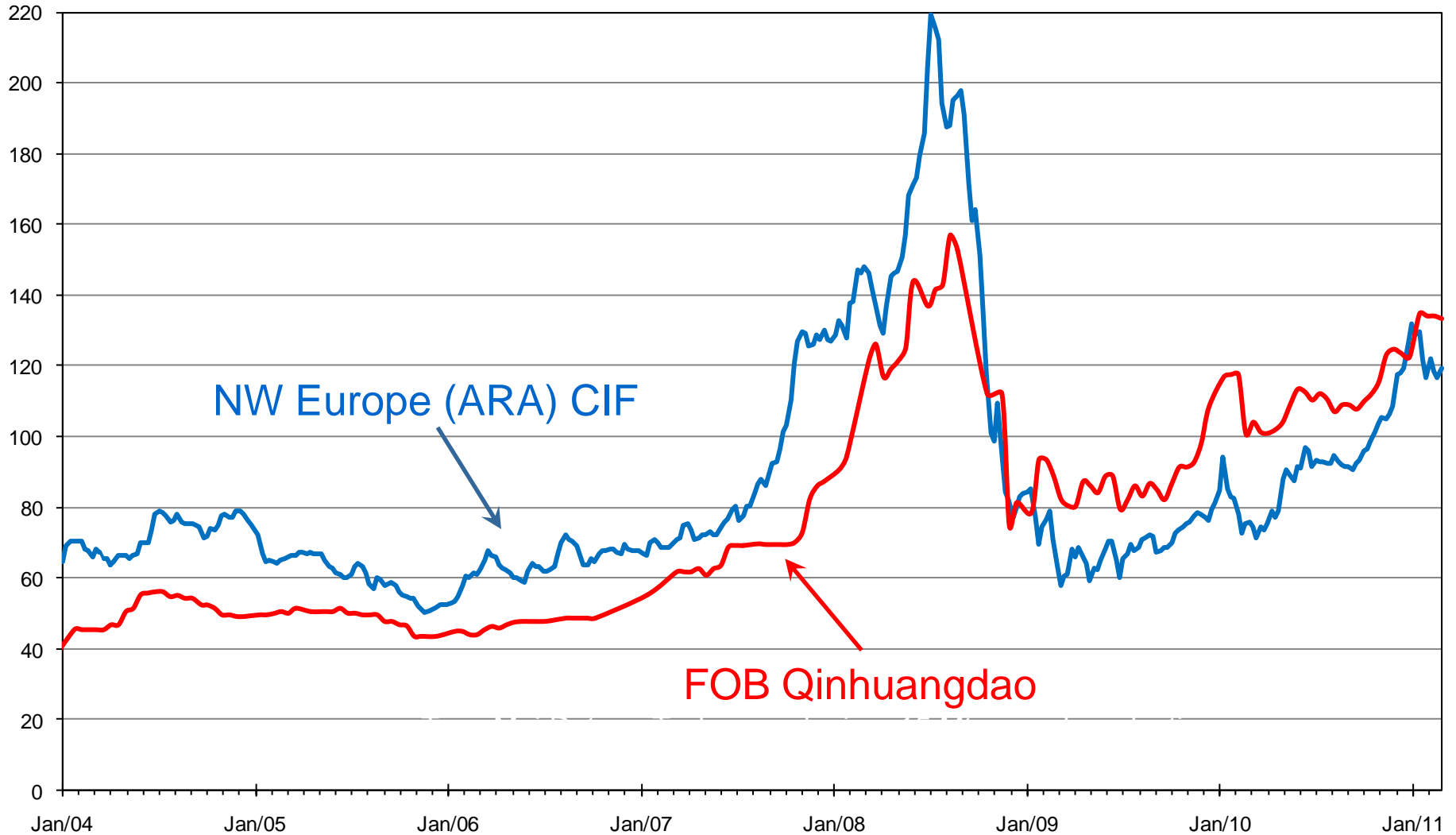


note: TPES: total primary energy supply
sources: EURACOAL and IEA databases

~60% of coal use ~20% of all energy production ~10% of TPES

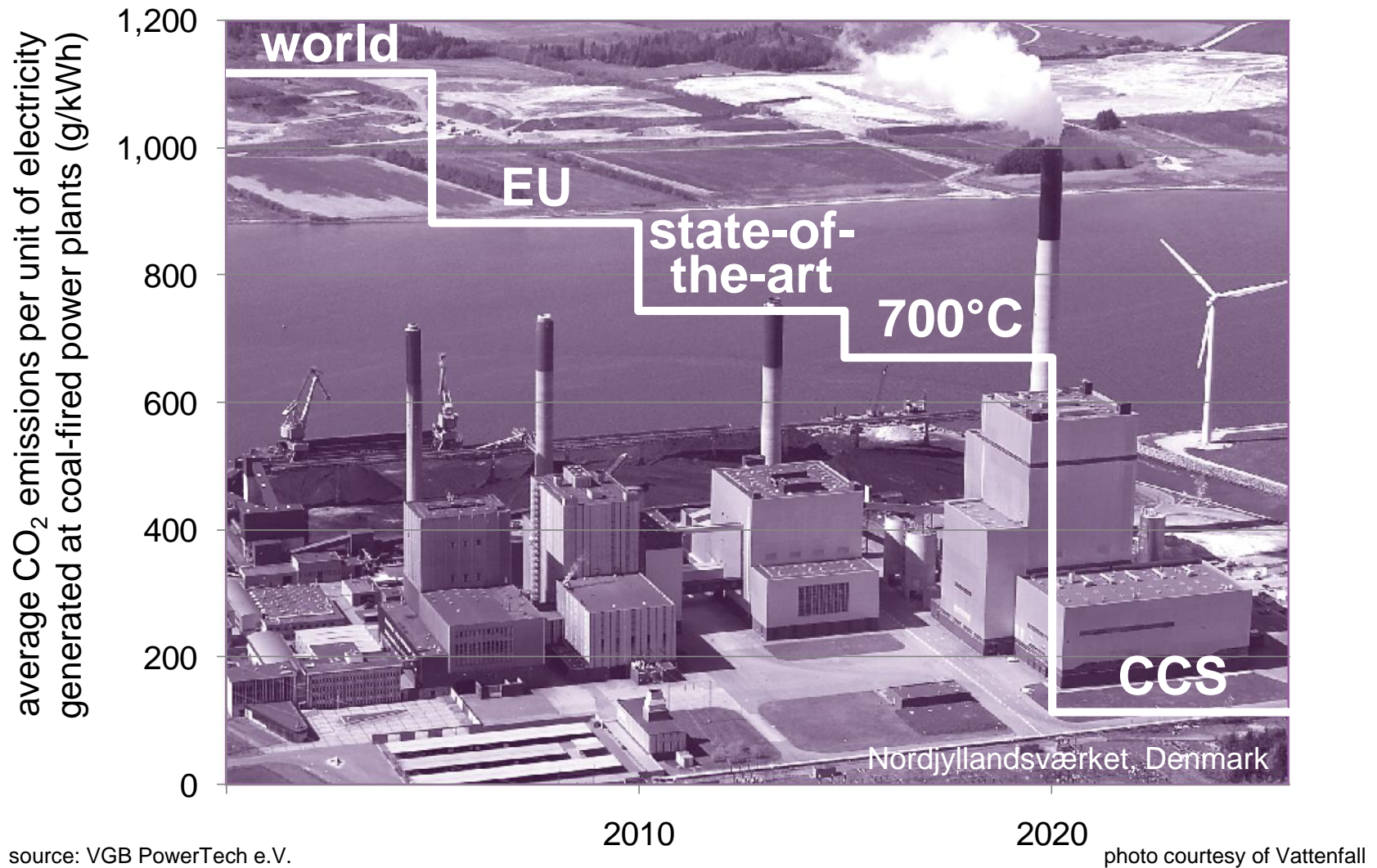
Coal prices in EU and China, 2004-2011

USD/tonne (6,000 kcal/kg net)



source: IHS McCloskey

Modernisation and CO₂ capture & storage (CCS)



Continuous power plant modernisation and new CCS-ready plants.

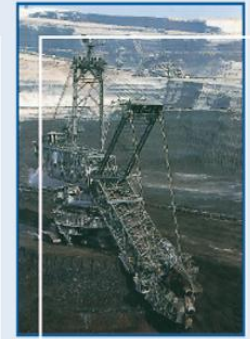
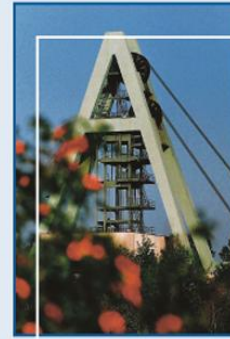
Conclusions

- Coal is the world's fastest-growing source of primary energy and the No.1 fuel for power generation.
- Coal is safe, reliable, affordable and becoming ever-more sustainable. Low CO₂ emissions can be achieved with CCS.
- Imported coal provides energy diversity. Indigenous coal reduces energy import dependence and generates wealth.
- Coal improves security of electricity supply around the world.

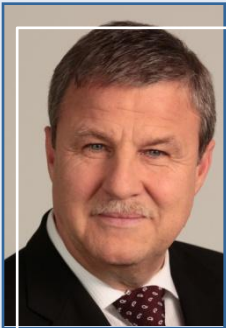
Coal is an important part of a balanced energy mix.

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Thank you!



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President

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