The role of coal in the present and the future European power mix

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key actions:

1. Immediate actions aimed at increasing the EU's capacity to overcome a major disruption during the winter 2014/2015
2. Strengthening emergency/solidarity mechanisms including coordination of risk assessments and contingency plans; and protecting strategic infrastructure
3. Moderating energy demand
4. Building a well-functioning and fully integrated internal market
5. Increasing energy production in the European Union
6. Further developing energy technologies
7. Diversifying external supplies and related infrastructure
8. Improving coordination of national energy policies and speaking with one voice in external energy policy
Import dependency has increased

Since the mid-90s import dependency up by 10 percentage points, but relatively stable in recent years

Significant decline in production of oil, gas and coal due to depletion of EU reserves and closures of uncompetitive sources against demand that was steadily growing until 2006, but flattening out since then

Source: Eurostat
Indigenous production of energy resources

- Further develop renewable energy, more market based and more coordinated
- Assess unconventional gas potential (Recommendation 2014/70/EU); European science and technology Network on shale gas
- Exploit hydrocarbons and clean coal, taking into account decarbonisation
- Develop and demonstrate Carbon Capture and Storage (CCS) (NER 300 Programme, EEPR), review of CCS Directive)
The share of coal in the EU power mix

Source: Eurostat
Solid fuels: Production and consumption

Solid fuels production and net imports in the EU-28

Source: Eurostat
Where does the import hard coal come from?

Extra EU-28 hard coal imports, 2012
Total imports = 215.2 Mt

- United States: 23.1%
- Colombia: 23.9%
- South Africa: 6.4%
- Australia: 7.5%
- Indonesia: 4.6%
- Russia: 25.8%
- Ukraine: 1.3%
- Others: 1.2%
- Non-specified: 4.6%

Solid fuel imports in the EU-27 (in thousands of metric tonnes)

Source: Eurostat
Coal-fired generation capacities in the EU

Age distribution of coal-fired power generating capacities in the EU, 2013

Source: Platts
How the power mix will look like?

Power generation in the EU-28 - 2013 PRIMES Ref. Scenario

Source: 2013 PRIMES
Conclusion

• Solid fuels important share in energy mix

• Beyond 2020: 40% reduction in GHG emission until 2030 in the EU (Energy and Climate Package)

• Increasing combustion efficiency

• CCS technologies : Need for demonstration projects and work on better public acceptance
Thank you!