Global Coal: trends and outlook

13th European Round Table on Coal
“Surging Global Demand for Coal: what it means for the EU”
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16 March 2011
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Chairman of the Managing Directors
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Coal in total primary energy supply, 2008

World: 12 267 Mtoe

EU-27: 1 751 Mtoe (14.3%)

Coal 27.0%
Oil
Gas
Nuclear
Hydro
Other
Combustible renewables & waste

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

Tong Mei Datang Tashan coal mine: 15 Mt annual production

China joins WTO

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

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

note: TPES: total primary energy supply
sources: EURACOAL and IEA databases
Coal prices in EU and China, 2004-2011

Tong Mei Datang Tashan coal mine: 15 Mt annual production

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source: IHS McCloskey
Modernisation and CO\textsubscript{2} capture & storage (CCS)

Continuous power plant modernisation and new CCS-ready plants.

average CO\textsubscript{2} emissions per unit of electricity generated at coal-fired power plants (g/kWh)

source: VGB PowerTech e.V.

photo courtesy of Vattenfall

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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 CO$_2$ 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.
Thank you!