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European Association
for Coal and Lignite



Trends in the global hard coal mining industry

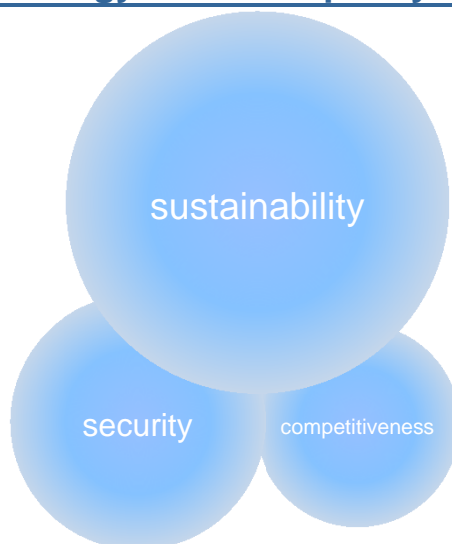
Is it possible to reorient EU mining policy?

European Economic Congress 2013

15 May 2013
Biuro Centrum, Katowice

Nigel YAXLEY
Vice President, EURACOAL

Balanced energy & climate policy objectives?



Sustainability dominates debate in Brussels, but people want jobs & security.

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Coal mining creates economic wealth in the EU

- 130 Mt hard coal
- 430 Mt brown coal
- Most important indigenous energy
- €27 billion annual value of energy
- 255 000 direct jobs
- ~2.5 indirect jobs for each direct one
- > 1 million jobs across Europe

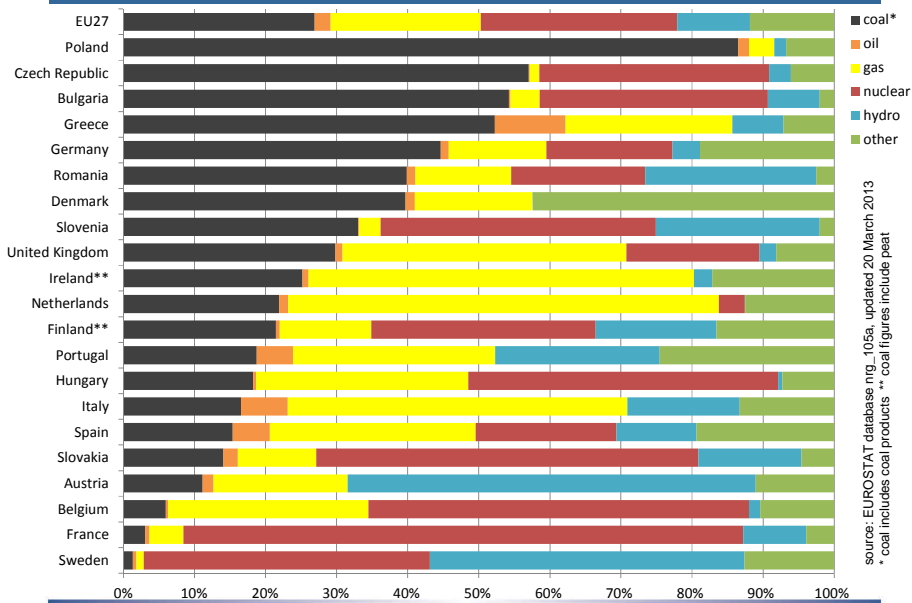


In February 2012, Lubelski Węgiel „BOGDANKA” S.A. set a world production record from a face at the company's mine near Lublin in east Poland. The company plans to double production to 11.5 million tonnes in 2014 when Bogdanka mine will become one of the world's most productive deep mines.

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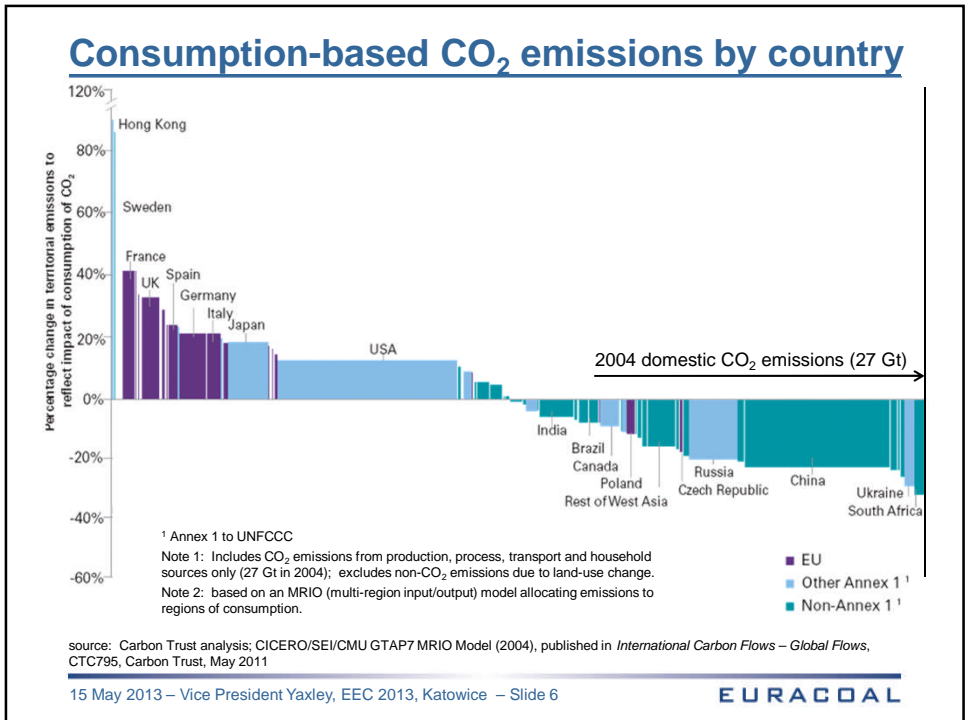
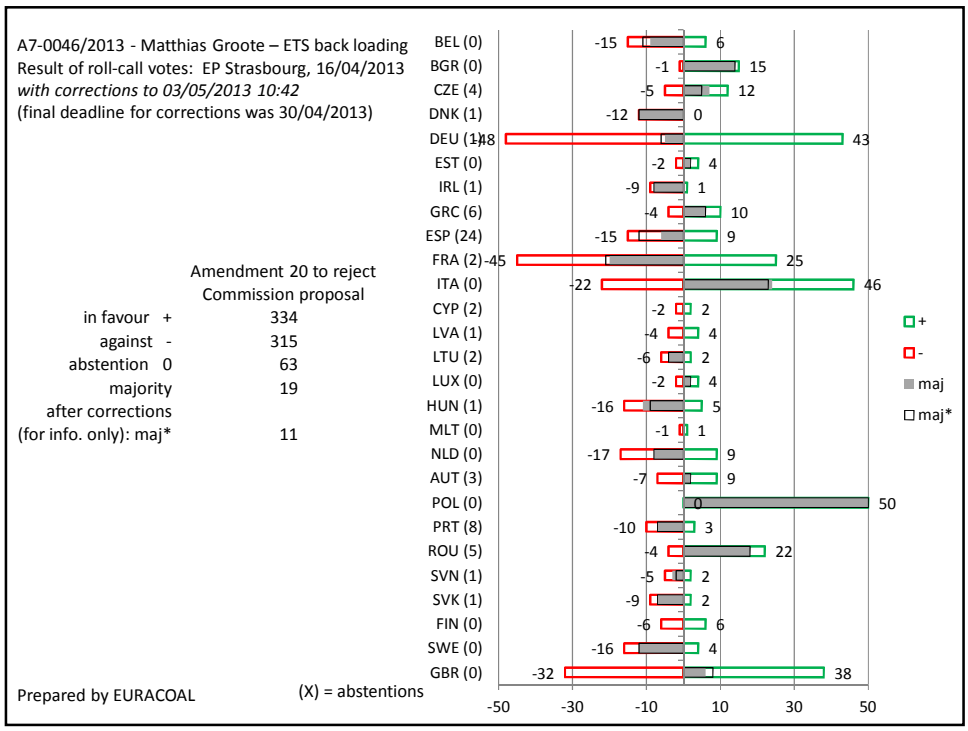
Coal-fired power generation in the EU, 2011



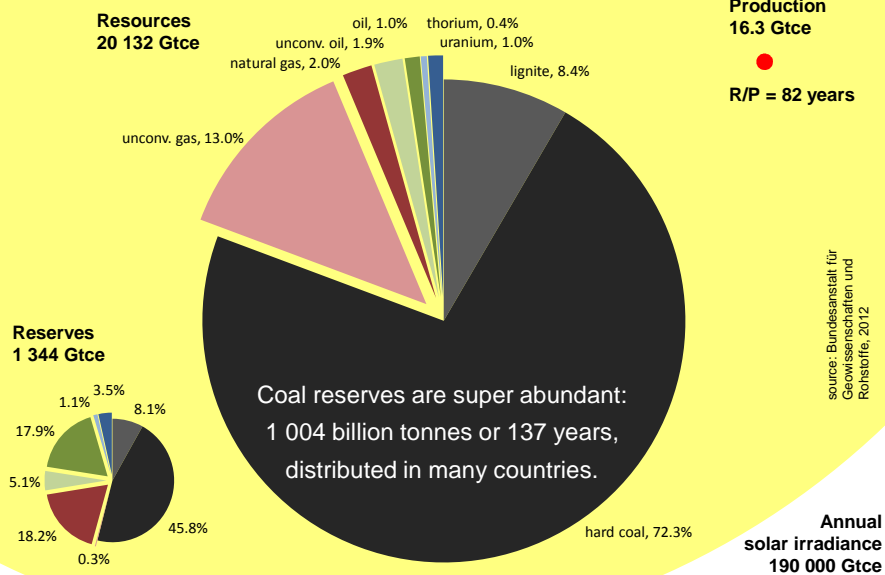
source: EUROSTAT database mg_105a, updated 20 March 2013
* coal includes coal products ** coal figures include peat

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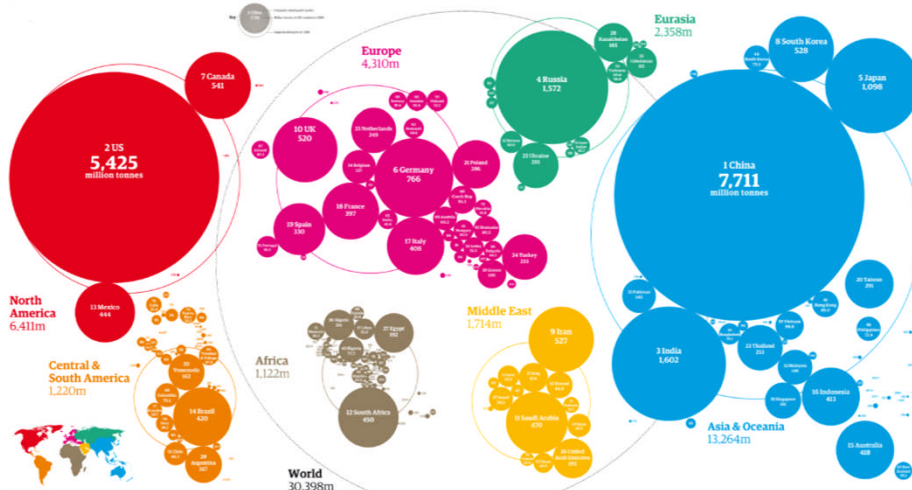
Global energy resources, reserves and use



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Global CO₂ emissions, 2009



source: Guardian, 2011, using data from US Energy Information Administration (reproduced with permission)

EU accounts for just 11% of global GHG emissions.

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EU carbon footprint is massively influenced by inter-regional trade

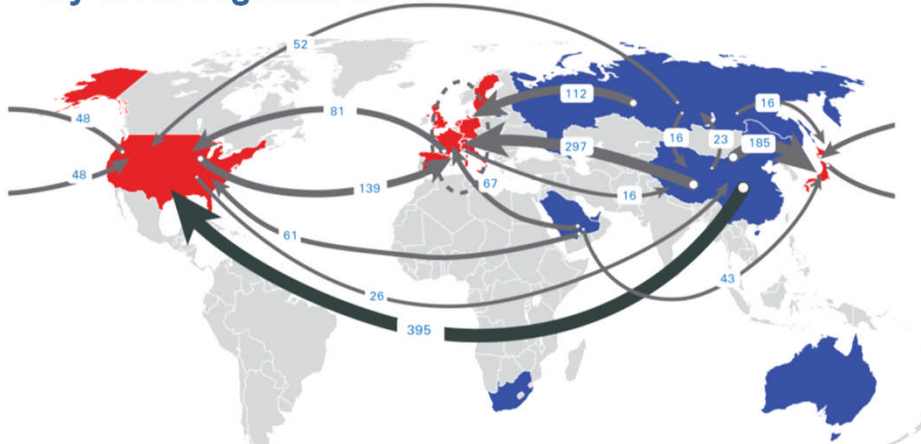


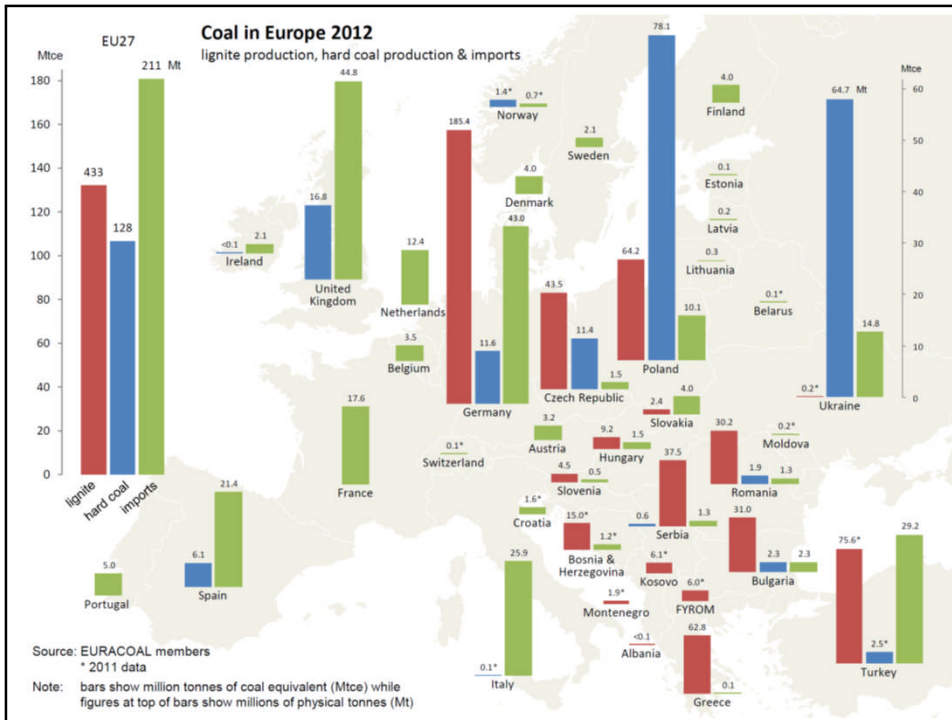
Chart shows the largest inter-regional fluxes of emissions embodied in trade (MtCO₂/year) from dominant net exporting countries (blue) to the dominant net importing countries (red). Fluxes to and from Western Europe are aggregated to include UK, France, Germany, Italy, Spain, Luxembourg, Netherlands & Sweden.

Source: Davis and Caldeira, 2010

On a consumption basis, EU carbon footprint grew 47% from 1990 to 2010.

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EURACOAL: 35 members from 20 countries

- COALPRO - Confederation of UK Coal Producers (GBR)
- DEBRIV - Deutscher Braunkohlen-Industrie-Verein (DEU)
- GVSt - Gesamtverband Steinkohle (DEU)
- MMI - Mini Maritza Istok (BGR)
- PPC - Public Power Corporation (GRC)
- PPWB - Confederation of the Polish Lignite Producers (POL)
- ZPWGK - Polish Hard Coal Employer's Association (POL)
- ENEL (ITA)
- ZSDNP - Czech Confederation of Coal and Oil Producers (CZE)
- APFCR - Coal Producers and Suppliers Association of Romania (ROU)
- BRGM - French Geological Service (FRA)
- CARBUNIÓN - Federation of Spanish Coal Producers (ESP)
- Coallmp - Association of UK Coal Importers (GBR)
- D.TEK (UKR)
- EPS - Electric Power Industry of Serbia (SRB)
- GIG - Central Mining Research Institute (POL)
- HBP - Hornonitrianske bane Prievidza (SVK)
- ISFTA - Institute for Solid Fuels Technology & Applications (GRC)
- Mátrai Kraftwerke (HUN)
- PATROMIN - Federation of the Romanian Mining Industry (ROU)
- Premogovnik Velenje (SVN)
- RMU Banovici D.D. (BIH)
- Swedish Coal Institute (SWE)
- TKI - Turkish Coal Enterprises (TUR)
- Ukrvuglerobotodavtsy - All-Ukrainian Coal Employer's Association (UKR)
- Vagledobiv Bobov dol EOOD (BGR)
- VDKI - Verein der Kohlenimporteure (DEU)
- Coaltrans Conferences Limited (GBR)
- EMAG (POL)
- Finnish Coal Info (FIN)
- Golder Associates (GBR)
- Geocontrol (ESP)
- ISSeP - Institut Scientifique de Service Public (BEL)
- KOMAG (POL)
- University of Nottingham (GBR)



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Thank you!



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