

# World Coal Outlook 2005

● Huang Shengchu et al

## 2005 世界煤炭发展报告

● 黄盛初 主编



煤炭工业出版社·北京

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# **World Coal Outlook 2005**

## **Prepared by**

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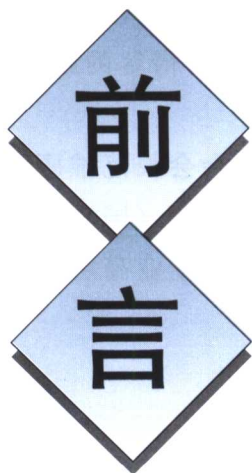
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近年来,全球经济迅猛发展,世界原油短缺,价格大幅飙升;世界煤炭生产和消费呈现持续增长趋势,煤炭价格经过几年的波动之后于2004年出现大幅攀升。能源供需已成为各国关注的焦点,全球正迎来高能源价格时代。面对这种能源形势,各国煤炭行业积极调整发展战略,应对新能源时代的挑战。

《2005世界煤炭发展报告》对国际煤炭行业2004年现状及未来发展趋势进行了研究与分析。2004年,世界煤炭供应继续呈稳定增长势头,煤炭总产量达5 508.1 Mt,同比增长7.5%,远高于2003年2.8%的增长水平。主要产煤国中,中国、哥伦比亚、印度、俄罗斯和印度尼西亚的煤炭产量有大幅增长,而南非和乌克兰的产量有所下降。2004年全球煤炭需求量达到4 003.03 Mt标准煤,同比增长8.5%(2003年增幅为3.8%),这主要是由于澳大利亚和日本对炼焦煤需求增加,中国发电业和钢铁行业对煤炭需求增加。煤炭贸易量也呈稳定增长态势,澳大利亚煤炭出口量为218.4 Mt,仍保持煤炭出口大国地位;印度尼西亚煤炭贸易量为107.4 Mt,超过中国,成为世界第二大煤炭出口国。受国际能源价格的影响,2004年煤炭交易价格与2003年相比急剧增长。随着国际市场煤炭需求的持续增长,一些国际大煤炭公司不断调整经营战略,积极扩大生产规模和占有新的海外资源,中国大型现代化煤炭集团公司的发展也在世界煤炭领域产生了重要影响。

2004年,由国家发展和改革委员会能源局牵头,国家安全生产监督管理局信息研究院(煤炭信息研究院)组织撰写,并由煤炭工业出版社于2005年出版的系列年度报告首创版——《2004世界煤炭发展报告》出版后,得到煤炭行业权威专家的高度评价,并荣获2005年中国煤炭工业科学技术二等奖。

本报告——《2005世界煤炭发展报告》从经济全球化的视角,研究了2004年世界煤炭发展新动态,世界煤炭市场新趋势,国外煤炭大集团公司的经营发展战略新特点,与《2004世界煤炭发展报告》相比,增加了国外主要产煤国家煤矿安全生产现状与管理经验,以及对中国主要周边国家在煤炭行业的投



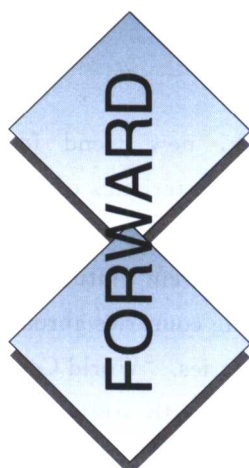
资机会的分析等内容。《2005 世界煤炭发展报告》将为我国煤炭工业政府部门制定煤炭行业发展战略和政策法规，以及煤炭企业调整经营发展战略，提供可借鉴的经验。附录中提供了最新的世界煤炭统计数据。

《2005 世界煤炭发展报告》撰写工作继续得到了中国煤炭工业协会会长范维唐院士、国家发展和改革委员会能源局吴吟副局长、中国煤炭工业协会国际部（国家安全生产监督管理局国际合作中心）副主任胡予红研究员，以及一些煤炭企业高层人士和专家的大力支持和帮助，在此谨致以衷心感谢。

黄威初

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2006 年 3 月 10 日于北京



In the recent years, the global economy developed fast and vigorously. The crude oil price rose substantially due to oil shortage. The growth of global coal production and consumption tended to increase constantly. Coal price went up by a large margin in 2004 after several years' fluctuation. Energy supply has become a focus point concerned by all countries. The world has entered into an era of high energy price. Under such conditions coal sectors in all the countries are actively adjusting their strategies for development to face the challenge of new energy era.

"World Coal Outlook 2005" made a comprehensive analysis of the current status and future development of coal sector in the world in 2004. The trend of world coal supply was constantly increasing in 2004. The total coal output reached 5508.1 Mt tonnes, an increase of 7.5% over the previous year, which was higher than 2.8% in 2003. Coal production increased to a great extent in major coal-producing countries, such as, China, Columbia, India, Russia and Indonesia. Coal demand reached 4003.03 Mt tce in 2004, an increase of 8.5% over the previous year. However, the increase was 3.8% in 2003. This was mainly due to increased demand for coking coal in Australia and Japan as well as increased demand for coal for power generation and iron and steel industry in China. Coal trade volume also rose steadily. Australia exported 218.4 Mt of coal, and still kept the position of a large coal exporting country. The volume of coal trade of India was 107.4 Mt, surpassing China and becoming the second largest coal exporting country in the world. Influenced by international energy price, the coal transaction price grew rapidly in 2004 as compared with 2003. With constant growth of international demand for coal, some international large coal companies adjusted continuously their business strategies. They actively expanded production scale and occupied new resources overseas. The development of large modern coal group companies in China also produced important influence on world coal domain.

"World Coal Outlook 2004", the first edition of a series of annual reports, was sponsored by National Development and Reform Commission. It was organized and drafted by China Coal Information Institute in 2004 and published by China Coal Industry Publishing House in 2005. It

was highly appreciated by authoritative experts in coal sector after publication, and won the Second Award of Science and Technology in coal sector in 2005.

“World Coal Outlook 2005” studies, from viewpoint of global economy, new trend for development of world coal, new trend of world coal market as well as new characteristics of the strategies for development of business of large coal group companies overseas in 2004. As compared with the edition of “World Coal Outlook 2004”, it adds to the context of the current status and administration experiences of work safety in coal mines of the major coal-producing countries abroad and analysis of investment opportunities for coal sector in China’s peripheral countries. “World Coal Outlook 2005” will provide the governmental departments related to coal sector with strategies, laws and regulations for development of coal sector as well as strategies for adjustment of business development of coal enterprises, which China can learn from. The latest statistics of world coal is provided in the appendices.

Mr. Fang Weitang, Chairman of China Coal Industry Association, Mr. Wu Yin, Director of Energy Bureau of National Development and Reform Commission, and Mrs HuYuhong, professor, Deputy Director-General of International Department of China Coal Industry Association (International Cooperation Center of SAWS) and high-level managers of some coal enterprises and relevant experts have continued to provide great support and assistance in working out the report. Here, I would like to extend my heartfelt to all them.



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10 March, 2006 Beijing

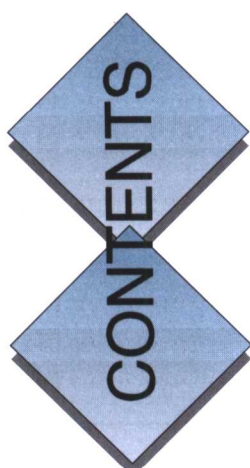
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## 第一章 世界煤炭发展动态及展望

煤炭是世界上储量最多、分布最广的一次能源(常规能源)。目前,煤炭占世界一次能源的 25% 左右,在世界经济中占有重要地位。据英国石油公司《2005 年世界能源统计评论》统计,2004 年末世界煤炭探明可采储量为 909.064 Gt,其中大约 75% 集中在经济合作与发展组织(OECD)北美地区、经济转型国家、中国和南亚地区。据估计,按照目前的生产水平,世界煤炭资源可供开采 165 年左右。

2004 年的世界煤炭总产量为 5 508.1 Mt,其中中国、美国、印度、澳大利亚、俄罗斯、南非、德国、波兰、印度尼西亚和哈萨克斯坦 10 个国家的煤炭产量为 4 808.1 Mt,占世界煤炭总产量的 87%。与前几年相比,2004 年世界煤炭产量、煤炭需求量和煤炭贸易量均呈稳步增长。据国际权威机构预测,煤炭在世界一次能源需求中所占的份额将有所下降,但在 2030 年之前,世界煤炭产量将仍以平均每年 1.4% 的幅度增长。

### 1.1 2004 年世界煤炭发展动态

#### 1.1.1 煤炭产量

世界煤炭总生产量自 2000 年以来一直呈稳定增长趋势。2004 年,世界煤炭总产量达 5 508.1 Mt,同比增长 7.5%,是 21 世纪以来增长最快的一年。其中硬煤产量达 4 629.2 Mt,同比增长 9.4%,是最近 30 年以来增长幅度最大的一年;褐煤产量为 878.9 Mt,同比下降 1.6%。2004 年世界 10 大产煤国及煤炭产量如图 1-1 所示。

2004 年硬煤产量的增长主要来自非 OECD 成员国家,例如中国、哥伦比亚、印度、俄罗斯和印度尼西亚等国家。非 OECD 国家 2004 年硬煤总产量为 3 180.4 Mt,较上年增长 12.5%。2004 年褐煤产量的下降主要是因俄罗斯、美国、捷克共和国和土耳其的褐煤产量大幅度下降。其中,俄罗斯 2004 年褐煤产量为 70.3 Mt,较 2003 年下降