

China Coal Outlook 2009

● Huang Shengchu et al

2009 中国煤炭发展报告

● 黄盛初 主编



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前

言

煤炭是中国的主体能源。新中国成立 60 周年,特别是改革开放 30 年来,中国煤炭工业取得了举世瞩目的成就。全国煤炭产量快速增加,大型煤炭企业不断发展,科技进步加快、自主创新能力显著增强,大型现代化煤矿生产比重逐渐增长,行业经济效益增加,全国煤矿安全生产形势稳步好转。

2008 年我国煤炭产量 2716Mt,同比增长 7.62%,比 1978 年的 618 Mt 增长了 3.4 倍,有力地保障了国民经济发展对煤炭的需求;生产集中度大幅提高,2008 年底,规模以上煤炭企业 8226 家、原煤产量 26.20 Mt,产量超过 10Mt 的煤炭企业 36 家、原煤产量 1376 Mt;6 Mt 大采高综采成套技术装备研发获得成功,低渗透性煤层群无煤柱煤与瓦斯共采关键技术取得突破;国家加大煤矿安全整治力度,煤矿安全投入大幅增加,安全监测监控技术装备水平不断提高。煤矿事故起数和死亡人数大幅下降。全国煤矿死亡人数由 2002 年的 6995 人减少到 2008 年底的 3214 人,百万吨死亡率由 4.94 下降到 1.18。

煤炭工业市场化改革取得成效。国家推行煤炭资源有偿使用,改革煤炭投融资体制,推进煤炭订货制度改革,建立煤炭成本完整化机制,现代企业制度逐渐完善。煤炭资源有偿使用制度基本建立。2008 年 8 个主要产煤省按照《国务院关于同意深化煤炭资源有偿使用制度改革试点方案的批复》分别制订了各省煤炭资源有偿使用制度改革试点实施意见,煤炭资源开发秩序逐年好转;国家改革煤炭投融资制度,建立了以市场为导向的多元投融资机制,有力地支撑了煤炭资源风险勘探和煤矿产能建设。据统计,“十五”和“十一五”前三年全国煤炭采选业固定资产投资完成 7789 亿元;国家改革煤炭订货制度,取消了由政府主导的煤炭订货制度,放开煤炭价格,鼓励煤炭供需双方自主衔接、自主定价,煤炭市场化价格机制基本形成。目前,除少量重点电煤合同外,基本上实现了价格的市场化;通过外部成本内部化,建立矿山生态环境治理机制,促进了煤炭清洁生产、综合利用和煤炭循环经济产业的快速发展,推进了煤炭成本完整化进程;绝大多数国有煤炭企业建立了现代企业制度。2008 年煤炭上市公司主营业务收入促使业绩高速增长,特别是山西省多数上市公司实现了营业收入和净利润双增长。煤炭企业主辅分离、企业办社会职能移交逐步推进,并取得了初步成效。

在当前国际金融危机不断加深和蔓延、国际煤炭贸易急剧萎缩、我国发电量特别是火力发电量增速减缓的形势下,煤炭行业要积极应对危机、树立科学的发展理念、深化改革、转变发展方式、提升整体发展能力,稳步推进煤炭工业健康可持续发展。

行业信息在国家宏观决策和企业发展战略及市场竞争中显得越来越重要。煤炭信息研究院院长黄盛初博士等专家接受媒体采访,以通栏大标题《能源紧张背后 专家呼吁信息透明》对信息的重要作用进行了深层次分析。2004 年由国家发展和改革委员会能源局牵头,煤炭信息研究院组织有关专家撰写并出版了《2004 中国煤炭发展报告》,收到了较好的效果。中国煤炭发展报告已成为煤炭信息研究院的重点研究项目。今后每年定期出版的报告都将针对当年的热点问题适当调整。煤炭信息研究院是煤炭行业权威信息中心,拥有一支从事煤炭信息研究工作的专家队伍,多年来对中国和世界煤炭工业发展趋势有较系统的、深入的研究,积累了丰富的研究成果和信息资料,为本报告的撰写工作提供了坚实基础。

《2009 中国煤炭发展报告》以改革开放 30 年、2008 年国民经济和社会发展趋势,以及宏观经济政策为背景,通过市场调查获得大量第一手资料和数据信息,深入分析煤炭生产与煤炭市场动态,包括煤炭需求预测、相关行业发展动向对煤炭市场的影响、煤矿安全、采矿技术与装备研究等,并对下一年的行业发展方向进行预测,提出相应的对策措施;《2009 中国煤炭发展报告》以专家的视角从宏观的、战略的高度全面反映煤炭工业改革与发展中重要成果、实践经验和发展趋势。

报告的撰写工作,得到了中国煤炭工业协会会长王显政、国家发展和改革委员会能源局吴吟副局长,以及各大煤炭企业高层人士和有关专家的大力支持和帮助。在这里,课题组谨向为报告编写工作给予热情支持和帮助的有关单位领导和专家深表感谢。

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院长

2009 年 6 月 15 日于北京



Coal is a mainstay of primary energy resources in China. In the past 60 years since the founding of People's Republic of China, especially in the 30 years since reform and opening up, coal sector has scored achievements in development, which have captured world attention. They are rapid growth of national coal output, constant development of large coal enterprises, rapid progress of science and technology, evident enhancement of independent innovation capacity, increasing proportion of coal output from modern large mines, increase of economic benefits of the trade and steady turn for the better in safe production situation in coal mines in China as well.

Coal output was 2716Mt in 2008 in China, an increase of 7.65% over the previous year or 4.4 times higher than 618 Mt in 1978, which guaranteed the demand of development of national economy for coal. The degree of production concentration rose to a great extent. There were 8226 coal enterprises with sales revenue greater than the specific size (referring to all the state owned and non-state owned enterprises with an annual sales revenue of 5 million Yuan or above) producing 26.20 Mt of raw coal, and 36 coal enterprises with an annual output greater than 10Mt producing 1376 Mt of raw coal by the end of 2008. Complete sets of technical installations for great mining heights were successfully developed for fully mechanized 6 Mt coal faces. Breakthroughs were made in key technologies for co-mining of group of coal seams with low permeability and gas, using the pillarless mining method. The State put greater efforts in control of safety in mines, and increased by big margin investment in mine safety. The level of safety monitoring technical equipping level was improving steadily. The number of accidents and fatalities in coal mines dropped greatly. The number of deaths in coal mines reduced from 6995 persons in 2002 to 3214 in coal mines in China by the end of 2008. The death rate per Mt of coal dropped from 4.94 to 1.18.

Reform of market-orientated coal sector achieved results. The State implemented the paid use of coal resources. The investment and financing systems were reformed in coal sector. Reform of coal ordering system was carried out, and the mechanism for completing full coal cost was built. Modern corporate governance system was gradually improved. The paid system for use of coal resources was basically established. In 2008 eight major coal-producing provinces promulgated respectively their opinions for

trial implementation of paid system for use of coal resources in their provinces in the light of “Approval and Reply of the State Council to the Trial Proposal for Deepening the Reform of the Paid System for Use of Coal Resources”, and the order of exploitation of coal resources was gradually improved. The State reformed the investment and financing systems in coal sector. It set up a multi-element investment and financing mechanism guided by the market, which supported risk exploration of coal resources and building of production capacity of coal mines. Based on national statistics, in the former three years of “the Tenth Five-Year Plan” and “the Eleventh Five-Year Plan” 778.9 billion Yuan investment on fixed assets for coal mining and preparation was completed in this country. The State reformed the coal ordering system, abolishing the system mainly guided by the government. Coal price was liberalized. It was encouraged that the buyers and sellers to contact and negotiate the coal price among themselves. The market orientated coal pricing mechanism was basically set up. Currently, except for a few key power coal contracts, coal price is basically liberalized. The progress of completing the coal cost was promoted by internalizing the external costs; by establishing the mechanism for prevention and control of ecological environment in coal mines; by promoting clean coal production, comprehensive utilization of coal, and rapid development of coal circular economic industries as well as promoting completion of full coal cost. Most of state-owned coal enterprises established modern corporate governance system. In 2008 the main business operating revenue of the listing coal companies made their performances to rise rapidly. Especially, most of listing companies in Shanxi Province increased both operating revenue and net profits. Separation of the main and auxiliary businesses of coal enterprises and transfer of social functions of the enterprises was gradually carried out and obtained preliminary results.

Currently, the international financial crisis continues to deepen and spread; the international coal trade shrinks drastically; the output of electricity, especially the growth of the output of thermal power slows down in China. Under such situation, the coal sector should actively cope with the crisis, set up the idea of scientific outlook on development, deepen reform, change the pattern of development, to uplift the integral development capacity and promote steadily the healthy and sustainable development of coal sector.

The role of trade information is becoming more and more important in making State macropolicy decisions, in making enterprises’ development strategy as well as in market competition. The news media visited experts in coal sector, such as Dr Huang Shengchu, President of CCII, and so on, and made a to-the-depth analysis of the importance of information in news with a banner headline entitled “Behind the Tense Situation of Energy—Experts Appealed for Transparent Information”. In 2004 it was decided to publish “China Coal Outlook 2004”, which was sponsored by Energy Bureau of NDRC, prepared by experts organized by CCII. Publication of the report received good results. It has now become a key research project of CCII. The contents of coming reports will be properly adjusted based on the hot points of each year and published periodically. CCII, an authoritative information center of the coal sector has a contingent of experts engaged in coal information research. They have made a systematic and deep-going survey on development of coal mining industry at home and abroad for many years. They have accumulated abundant information, which has laid a solid foundation for this report.

“China Coal Outlook 2009” has acquired large amount of first hand materials, data and information through market investigation, and used the national economy, social development and macroeconomic policies in 30 years since the reform and opening up and in 2008 as the background. The report has made a thorough investigation of trends of coal production and coal market, including forecast of coal demand, trends of development of relevant industries and their influences on coal market, coal mine safety, research on mining technology and equipment, etc. It has also made forecast on development orientation of coal sector in the next year and proposes corresponding counter-measures. “China Coal Outlook 2009” presents in all aspects the important achievements, practical experiences in the reform and development and trends of coal sector from the viewpoint of exports and at the horizon of macro and strategic altitude.

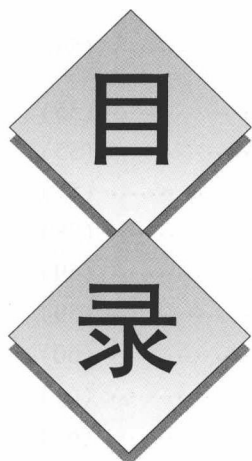
The report has been completed with support from Mr. Wang Xianzheng, Chairman of National Coal Association and Mr. Wu Yin, deputy Director of Energy Bureau of NDRC as well as high level leaders of large coal enterprises and relevant experts. The project team would like to express here their heartfelt thanks to leaders and experts from the organizations concerned, who have given warm support and assistance to the composition of the report.



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President, China Coal Information Institute

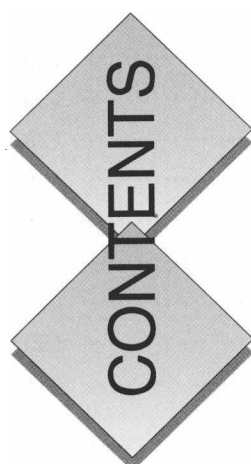
June 15, 2009, Beijing



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