



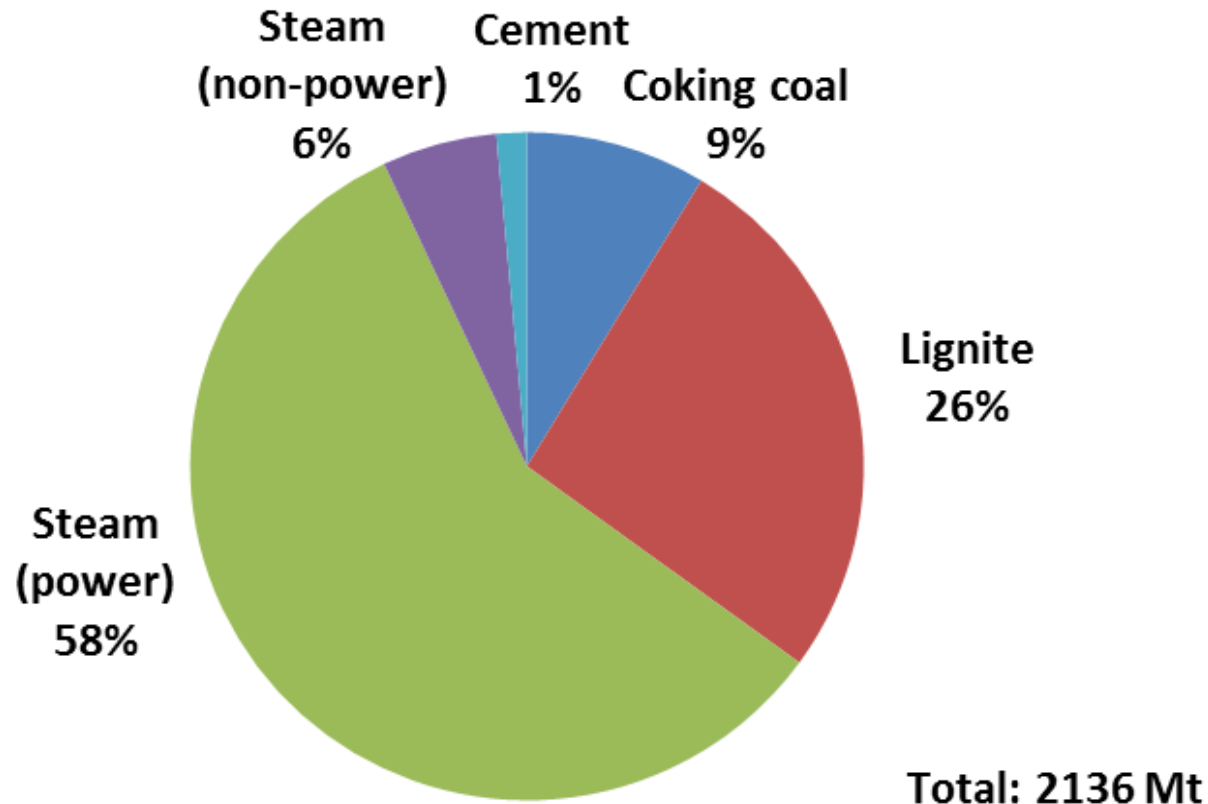
Secure • Sustainable • Together

Coal demand trends in OECD countries

Carlos Fernández Alvarez
Paris, 30 Oct 2014

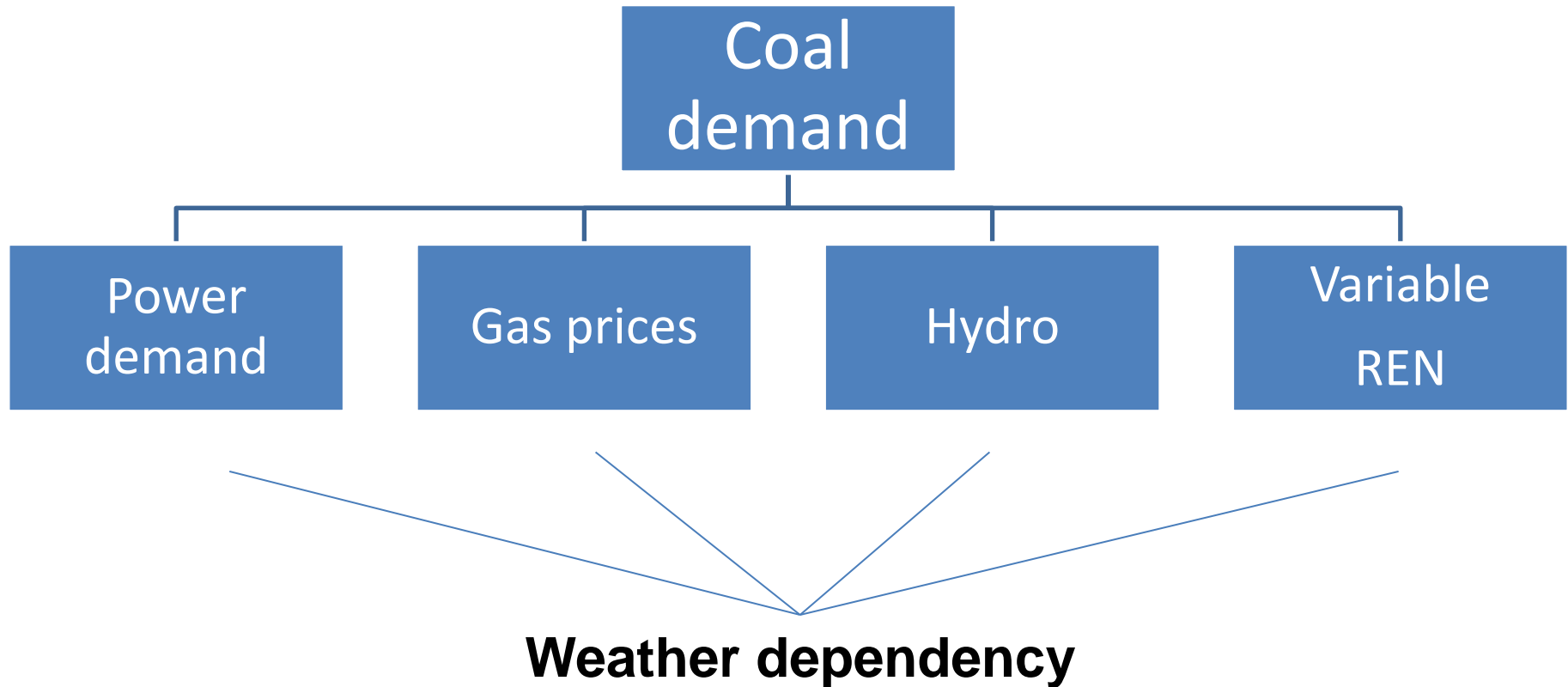
Coal is mainly power and steel

Coal use in OECD countries



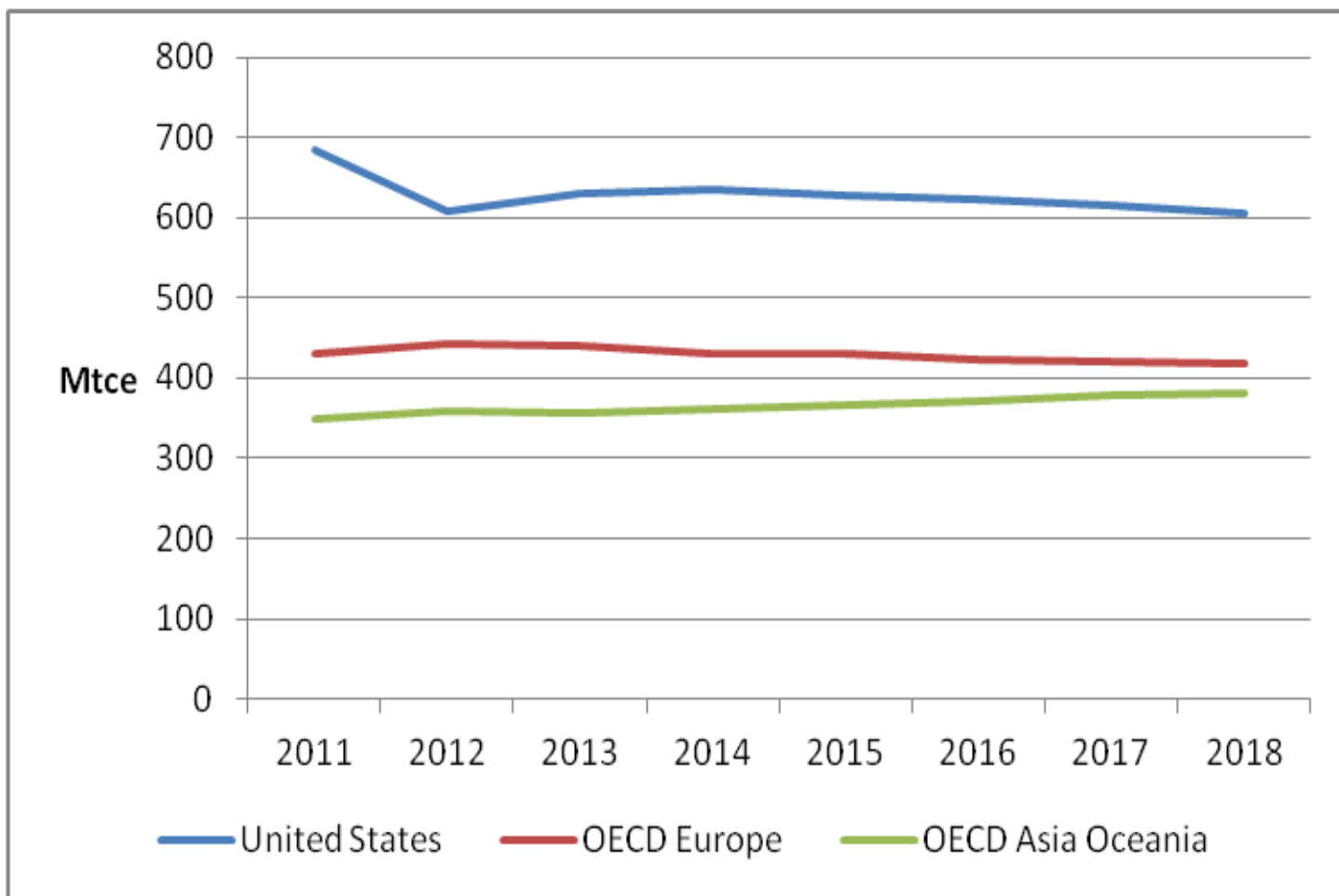
How to compete with lignite?





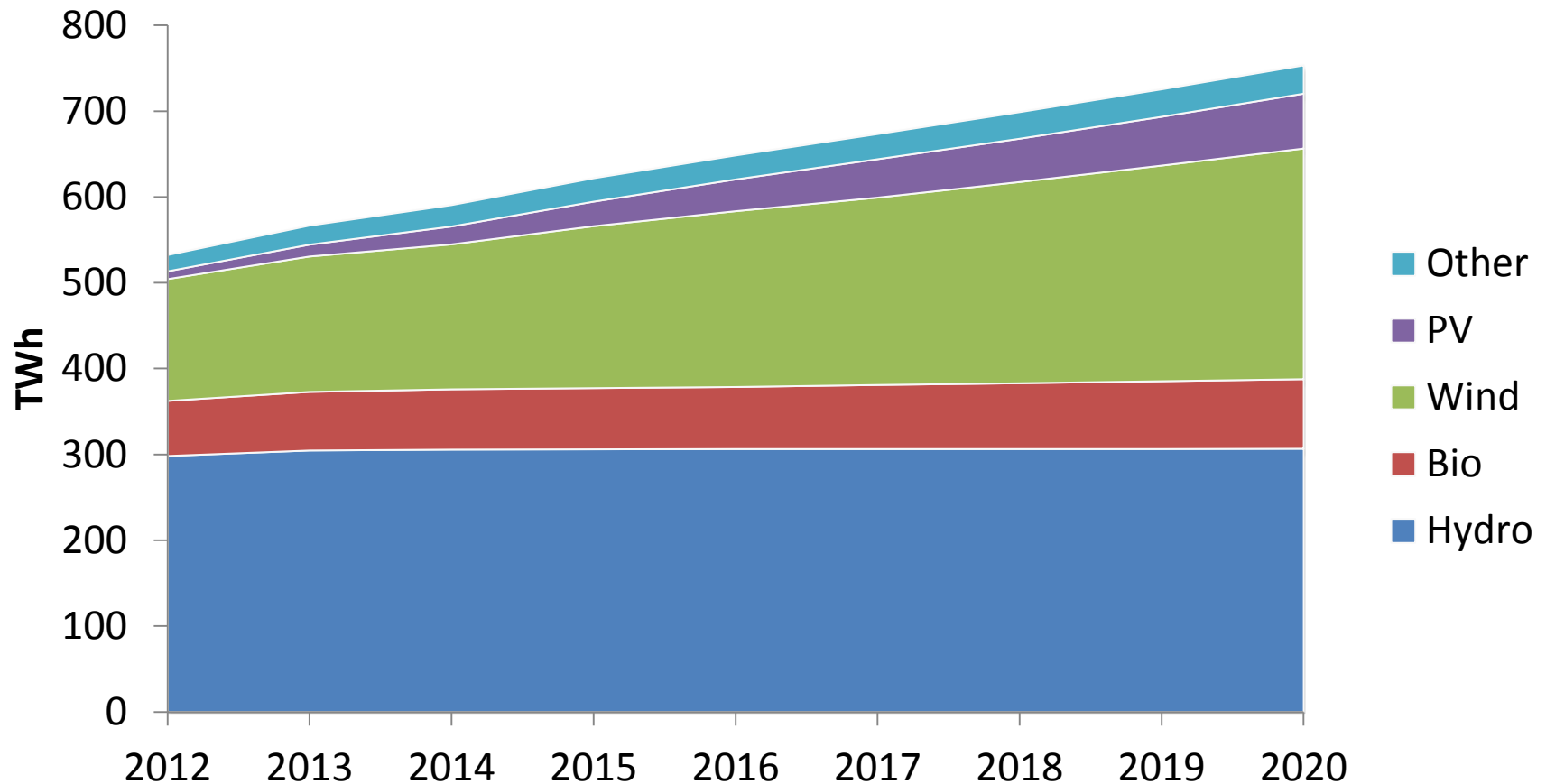
Coal is not leaving the OECD

Coal demand forecast for OECD countries



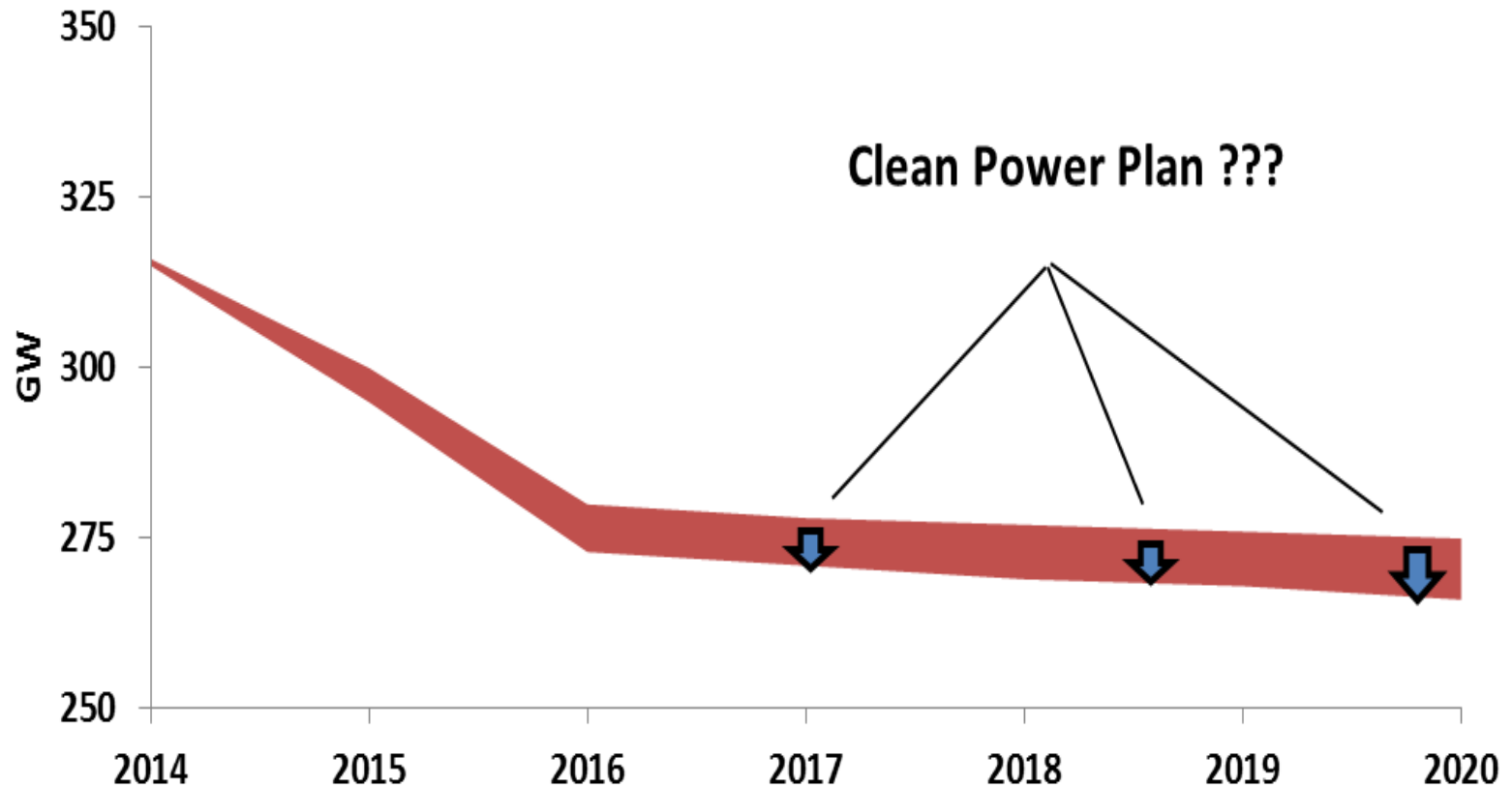
REN and gas squeezes coal

Renewable generation forecast in US

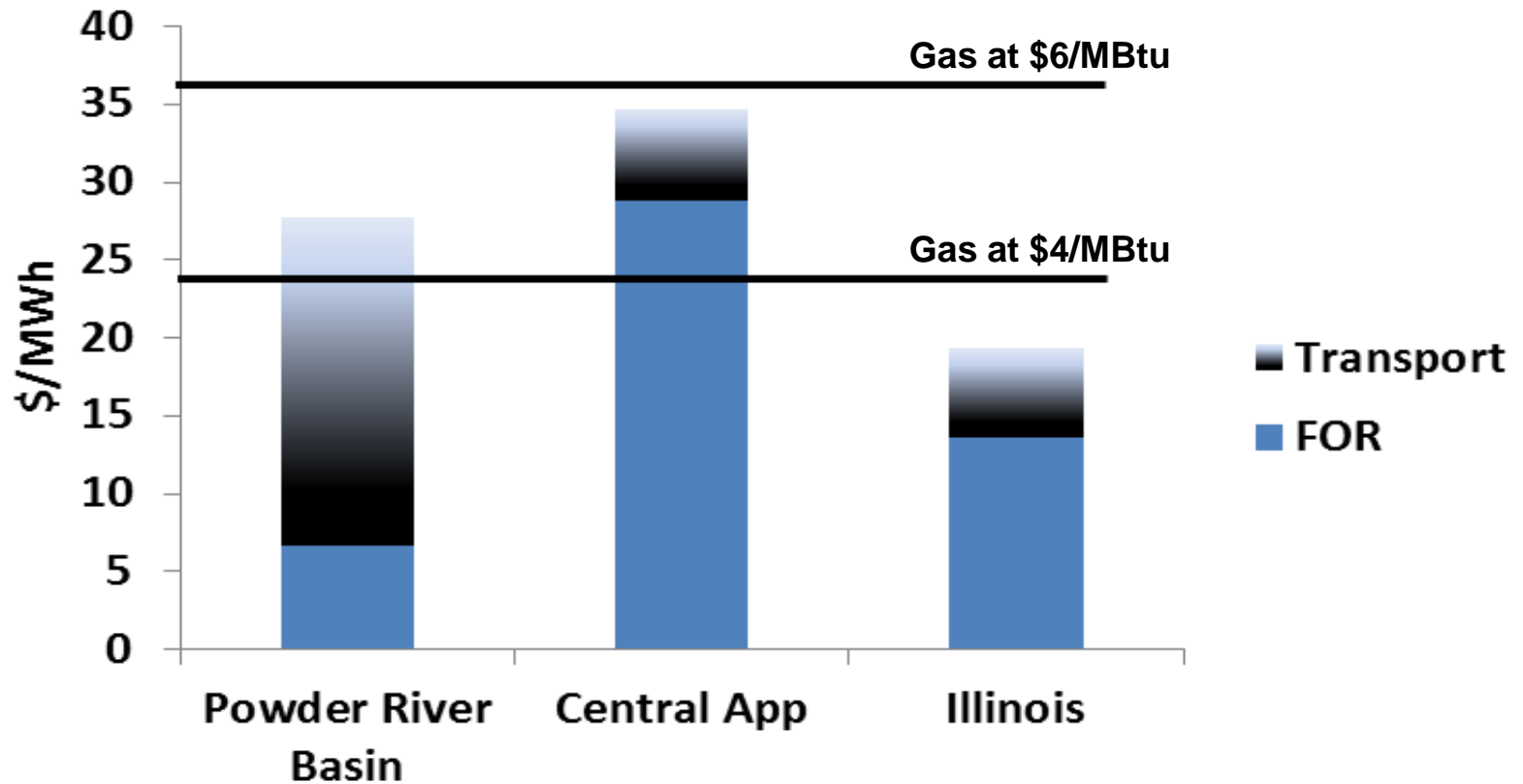


Large coal retirements

US coal capacity

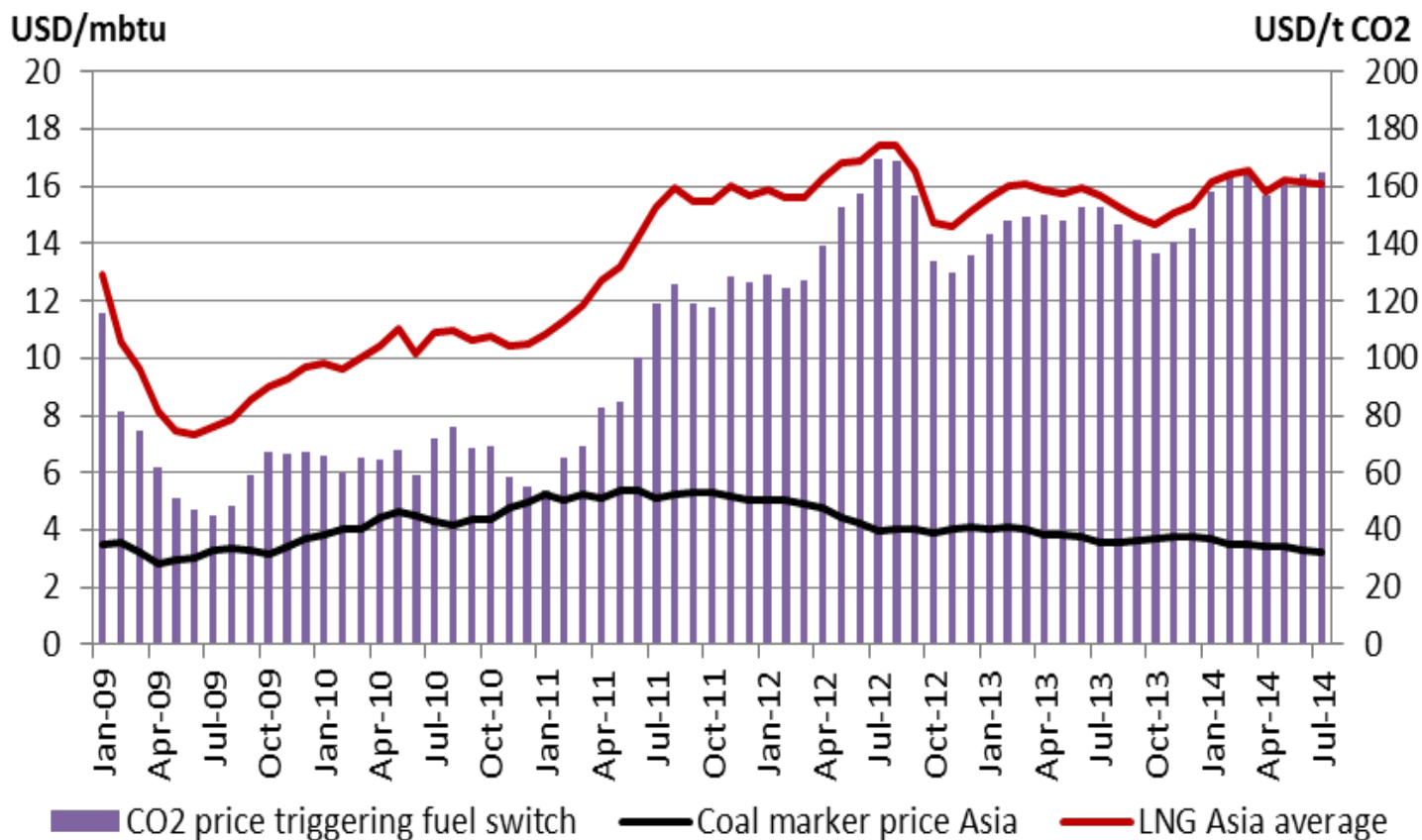


A lot of low cost coal in US



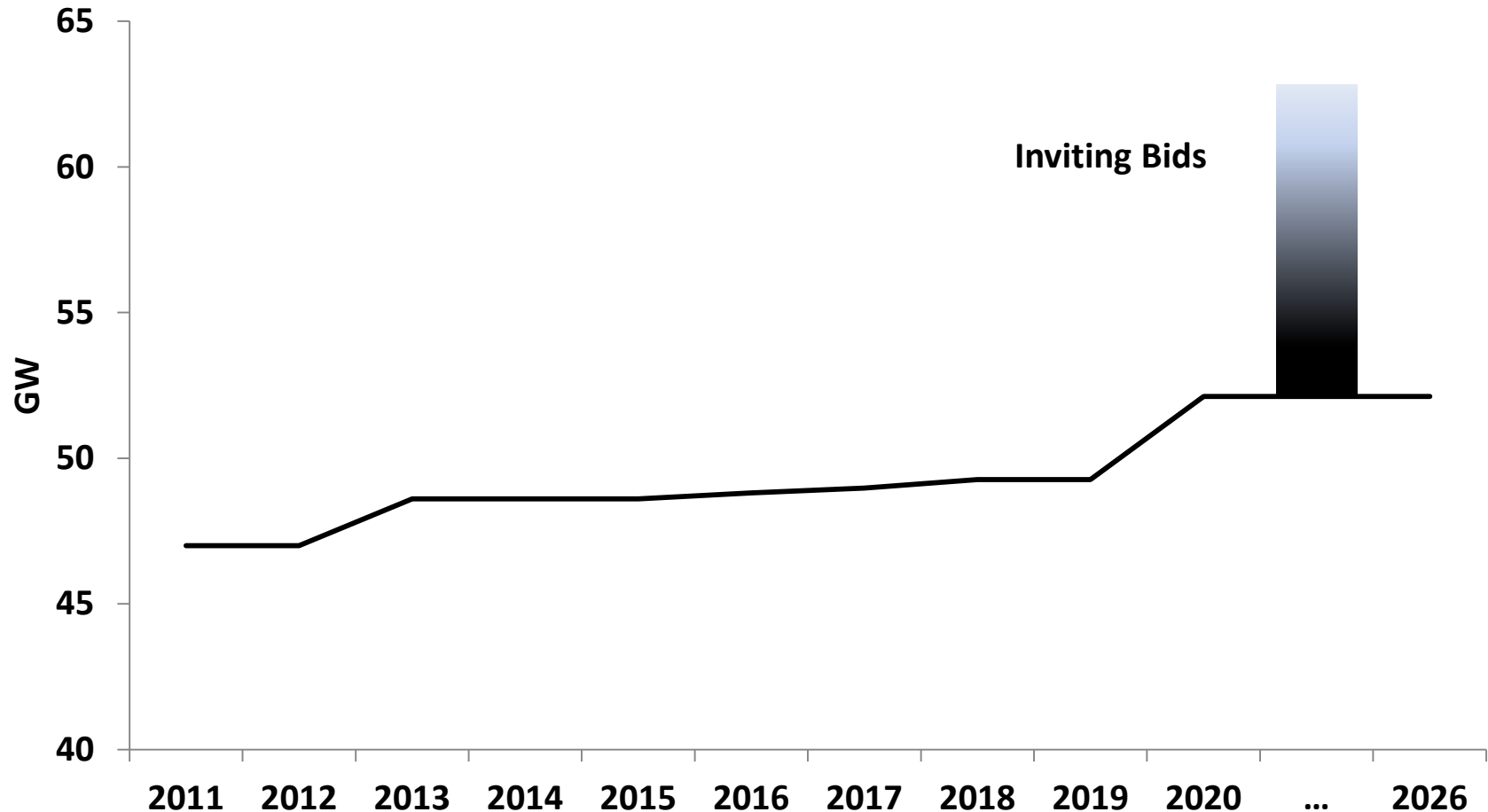
In Asia, this is another story

Coal and gas generation costs



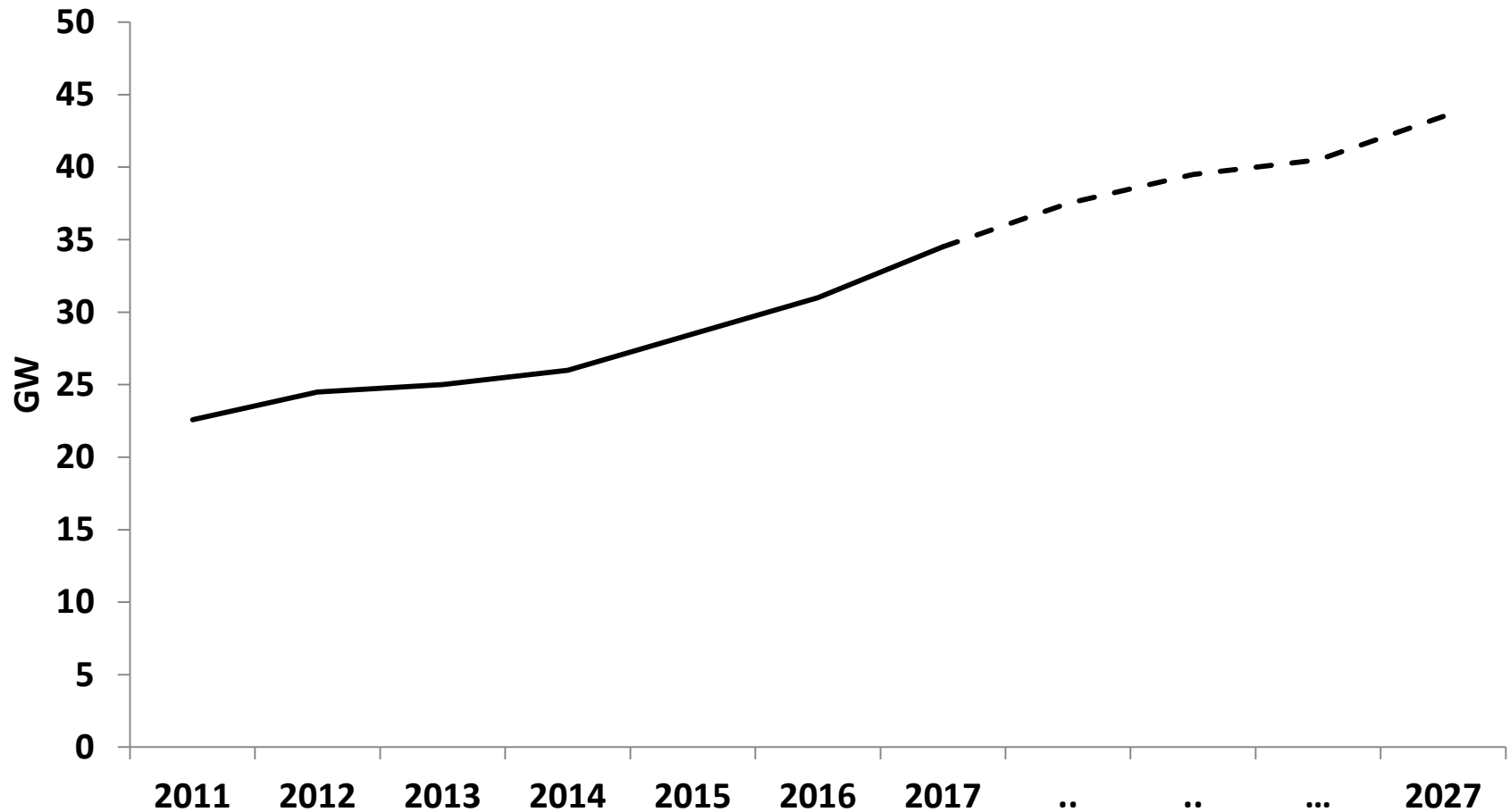
Japan relies on coal

Coal capacity in Japan



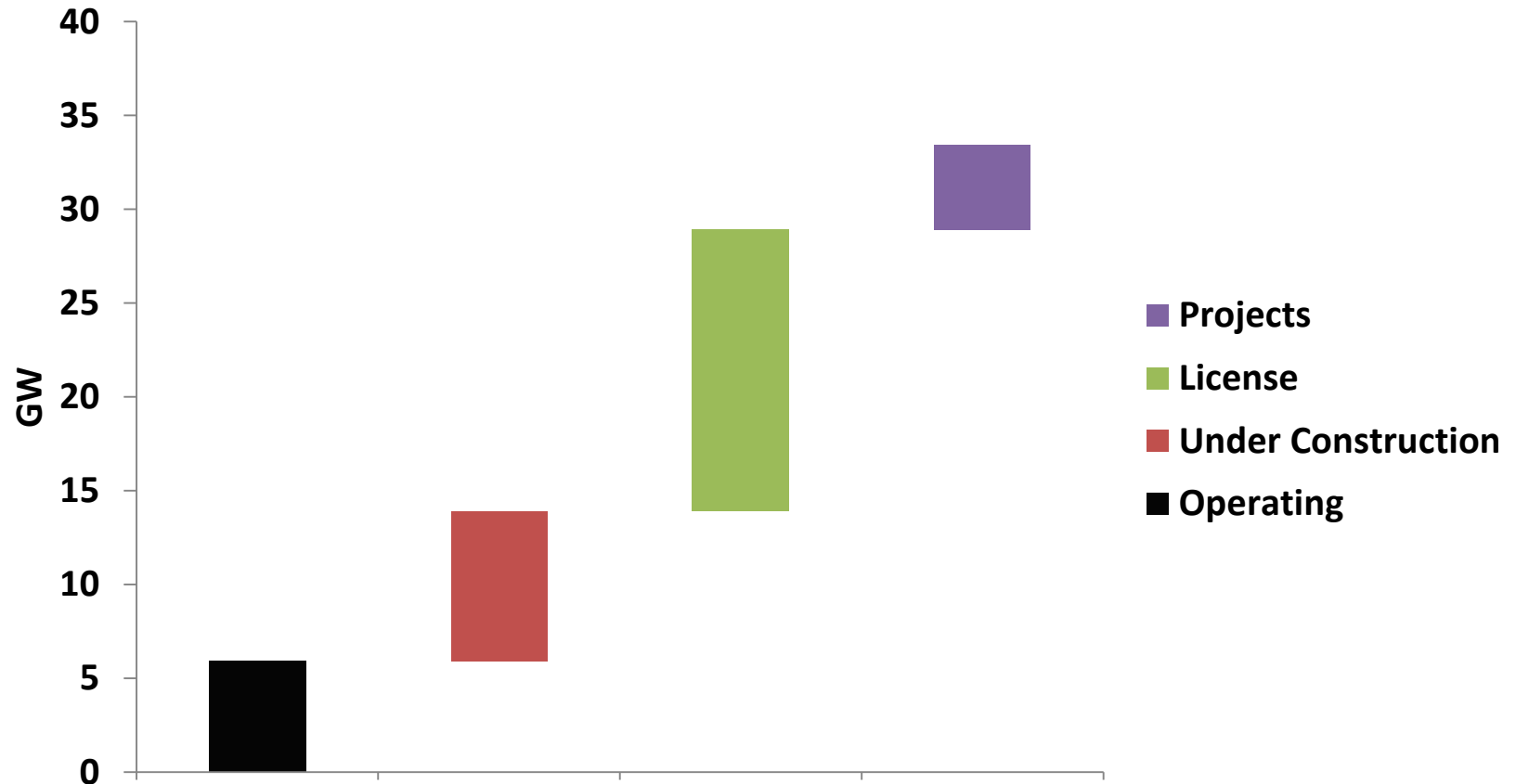
Korea also needs power

Coal capacity in Korea



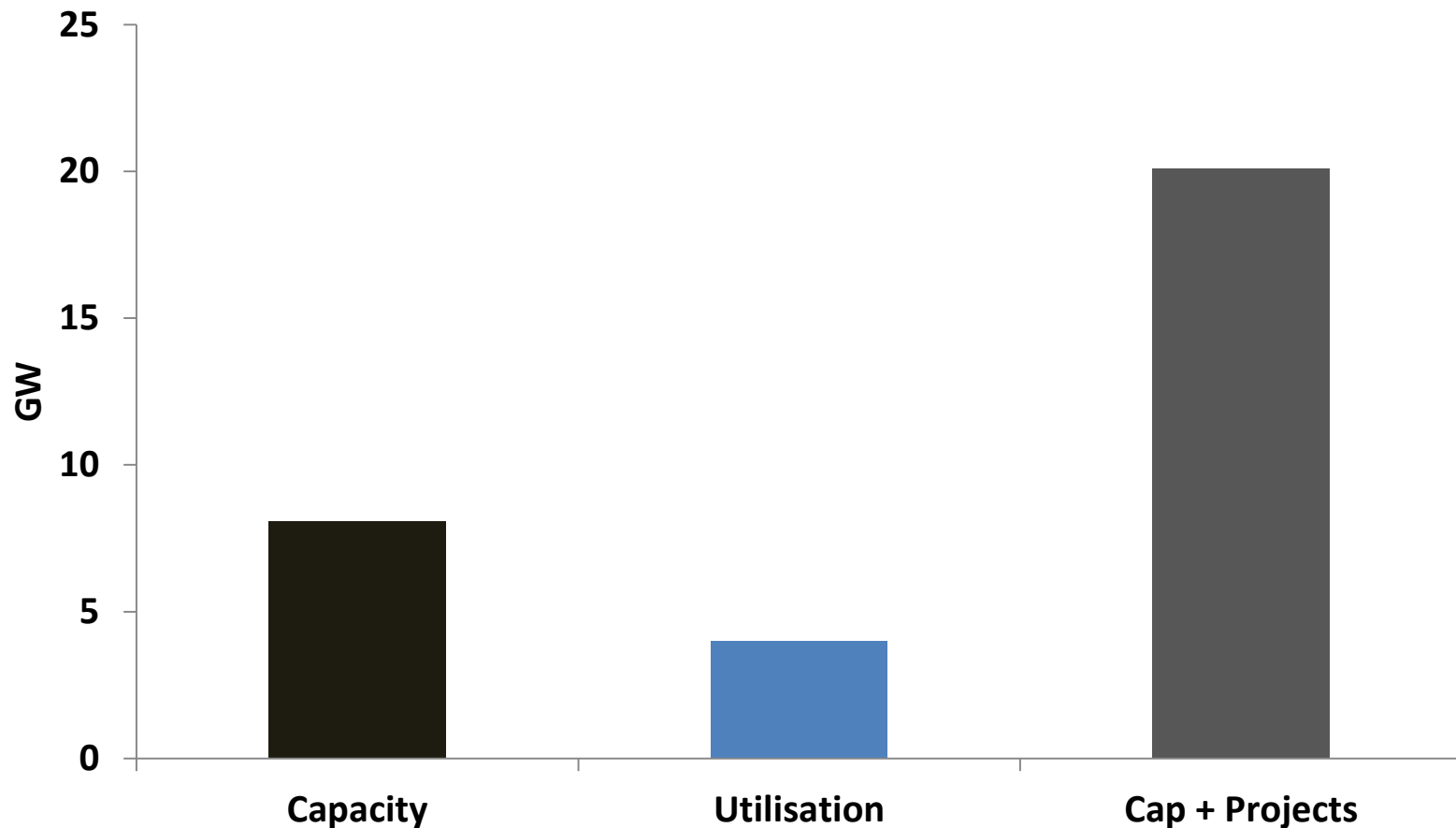
Turkey needs more energy

Hard coal capacity in Turkey



Large lignite reserves in Turkey

Lignite capacity in Turkey



An important milestone

Boundary Dam CCS Project





Secure • Sustainable • Together

Thanks for your attention

Comments to: Carlos.Fernandez@iea.org

www.iea.org