



Survey of enrichment requirements and capacity and their contractual coverage

At the request of its Advisory Committee, the Agency was proceeding with a survey of the enrichment requirements and contractual coverage of EU utilities for the period 2007–2015, and of the capacities of EU enrichers to contribute to fulfil these requirements. The intention was to assess the adequacy between demand and supply of enrichment with the aim to propose solutions, if or before difficulties arise. It should be reminded that the supply policy regarding enrichment remains unchanged.

At the Advisory Committee's meeting in October 2007, the Agency presented the main findings of the 2007 summer enrichment survey. The data published in the most recent Annual Report correlate well with the data processed during the enrichment survey. One conclusion that the Agency could draw, was that the European utilities' enrichment requirements are reasonably well covered by enrichment contracts until the fall of 2009.

The period from 2010 to 2013 could be very sensitive regarding the balance between enrichment services demand and offer, due to the transition between the shut down of gaseous diffusion plants and their replacement by new gaseous centrifugation capacities. Some concerns may appear during this period.

The Agency is concerned about the situation from 2013 onwards, even if European enricher companies said they will not be facing major capacity problems in meeting the requirements from European utilities.

As a general conclusion, the survey pointed out that the EU enrichers would be able to meet the demand but they will need to increase their capacities in order to satisfy the forecasted needs of EU utilities. The EU enricher companies signalled that important investments are currently being programmed to timely meet the demand.

Nevertheless, those Member States which are 100% dependent on one single enricher company, located inside or outside the EU, may face serious problems. Such a situation is not sustainable for the long term as the EU utilities need a balanced diversification supply policy.

The members of the Advisory Committee welcomed the enrichment survey and proposed that the Agency realises this kind of survey on a regular (yearly) basis, in order to closely follow the market developments. The Agency also proceeds with a similar survey on natural uranium in order to know what will be the future supply coverage of utilities and evaluate the level of diversification achieved.

This survey has been reassessed and the results reconfirmed during the Advisory Committee's meeting in March 2008.

Luxembourg, 8 April 2008