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Mining companies in the red, while miners are leaving the industry much faster

Polish mining companies are persistently unprofitable and dependent on a lifeline of state budget support – one of the main conclusions of the *Database of Coal Mines in Poland*, which the Instrat Foundation publishes every summer. At the same time, miners are leaving the profession at a sharply accelerating pace.

A persistently unprofitable sector

In January 2026, the Czech Republic ended production at its last hard coal mine, making Poland the last EU country still mining this resource. What is more, for yet another year in a row, the combined operating results of Polish mining companies are deep in the red – the sector's operating loss (EBITDA) amounted to PLN 8 billion.

The only companies in the black were LW Bogdanka and Południowy Koncern Węglowy (PKW). The former mines coal at the lowest cost in Poland (without subsidies) but depends on a single customer (Enea). JSW (PLN -3.9 billion) and PGG (PLN -2 billion) posted heavy losses – the latter openly admits that without state subsidies it would lose its financial liquidity[1]. Questions also remain over the future of PGE's persistently unprofitable lignite complexes in Bełchatów and Turów – the group company PGE GiEK recorded a record drop in profitability of more than PLN 2 billion in 2025 compared with the previous year.

Coal mining in Poland practically doesn't pay – notes Michał Hetmański, President of the Instrat Foundation – *we have to face the truth – the market has already decided the future of mining. In a few years, 2–3 mines will be enough to meet our coal demand. Anyone who says otherwise hasn't looked at the data.*

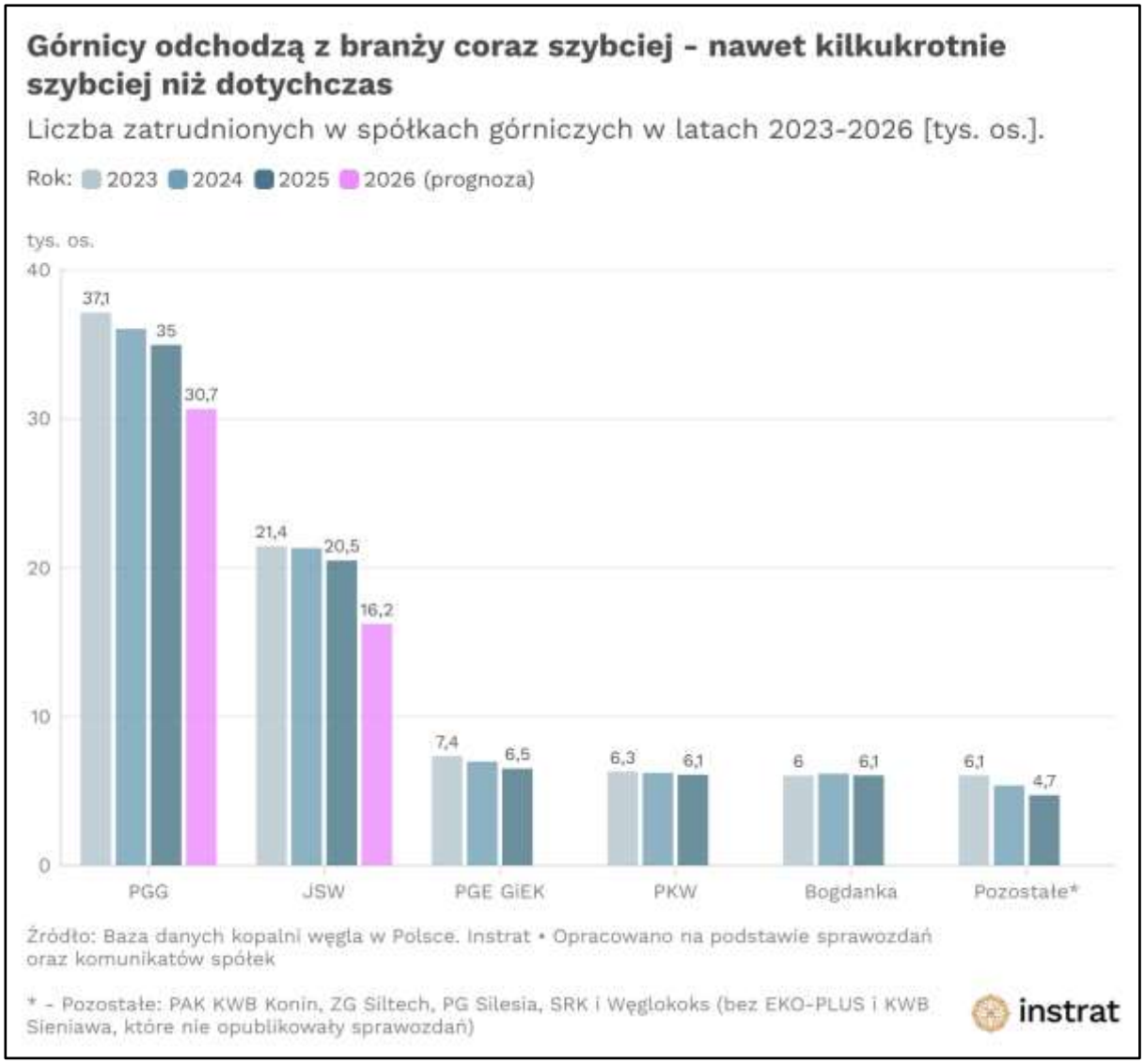
Miners leaving the profession six times faster

Miners are more willing to leave the profession because they have been given solid financial security. The process has accelerated thanks to the amendment to the Act on the functioning of hard coal mining and the social protection programmes it provides.

PGG and JSW forecast a combined workforce reduction of around 8,500 people by the end of 2026. That is 12% of employment in hard coal mining and a pace six times faster than the average of the last 4 years. At other mines, such as LW Bogdanka, the future of miners once production ends or is significantly reduced remains uncertain, according to an Instrat survey of miners in the Lublin region.

[1] Management Board report on the activities of Polska Grupa Górnicza S.A. in 2025.

Hard coal production fell by only 2.7% last year – too little, as output would need to fall even further to reduce existing stockpiles.



It's time for employers to take decisive action – the market shows they should speed up the roll-out of support packages for workers. Miners and power-sector workers deserve a roadmap for a just transition, not fairy tales from politicians about a supposed rebound and chances of saving the sector – comments Hetmański – *Meanwhile, over the past year Poland has closed only 3 mines (Wujek, Bielszowice, Bobrek), and has even opened a new one: the Grzegorz Shaft in Jaworzno, operated by PKW, which the coal market does not need. Where is the logic in that?*

Mining's last success

Unexpectedly, Instrat Foundation data show a positive trend – a marked 21% fall in methane emissions from mining. Methane is a potent greenhouse gas that, in the short term, warms the planet several dozen times more strongly than carbon dioxide. In Poland, hard coal mining accounts for more than ⅓ of total emissions of this gas.

While at PGG the fall in emissions is roughly proportional to the decline in production, the situation at JSW is different. Despite a slight increase in production, emissions were cut by around 30% – the result of investment in methane capture and its use for energy (modernisation of methane drainage stations and construction of cogeneration units).

Despite the positive trend, it should be remembered that Polish hard coal mines have a high methane content and, according to calculations by the Instrat Foundation, without firm action they may struggle to stay within the emission limit that comes into force in less than six months.

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The mine database, part of the Energy Instrat portal, is updated as part of the RAISING project ("Raising awareness of small local communities in the coal mining transition process"), funded by the Research Fund for Coal and Steel (RFCS).

The aim of the RAISING project is to raise awareness among small local communities and support them in the mining transition process.

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