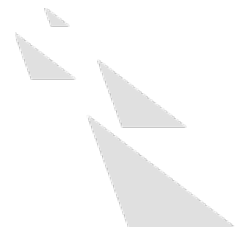




**IMAN** Report

India's Import – Coal & Coke

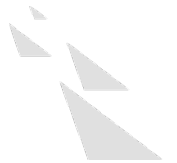
**Dec 2019**



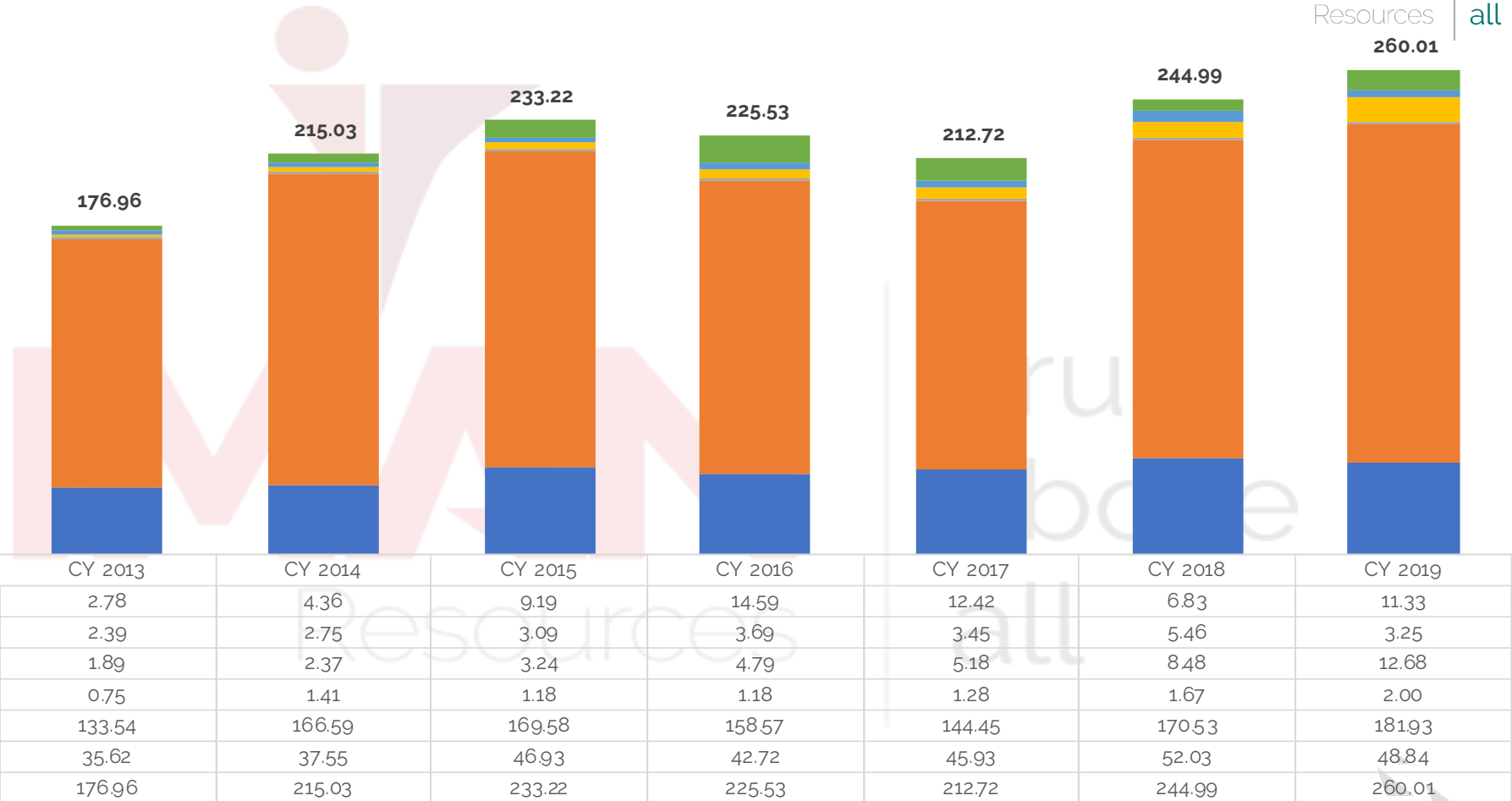


## Section - 1

## India – Total Imports Overview



# India's Imports – Coal & Coke (MMT)



- India's import of solid Fuels scales a new peak in CY 2019

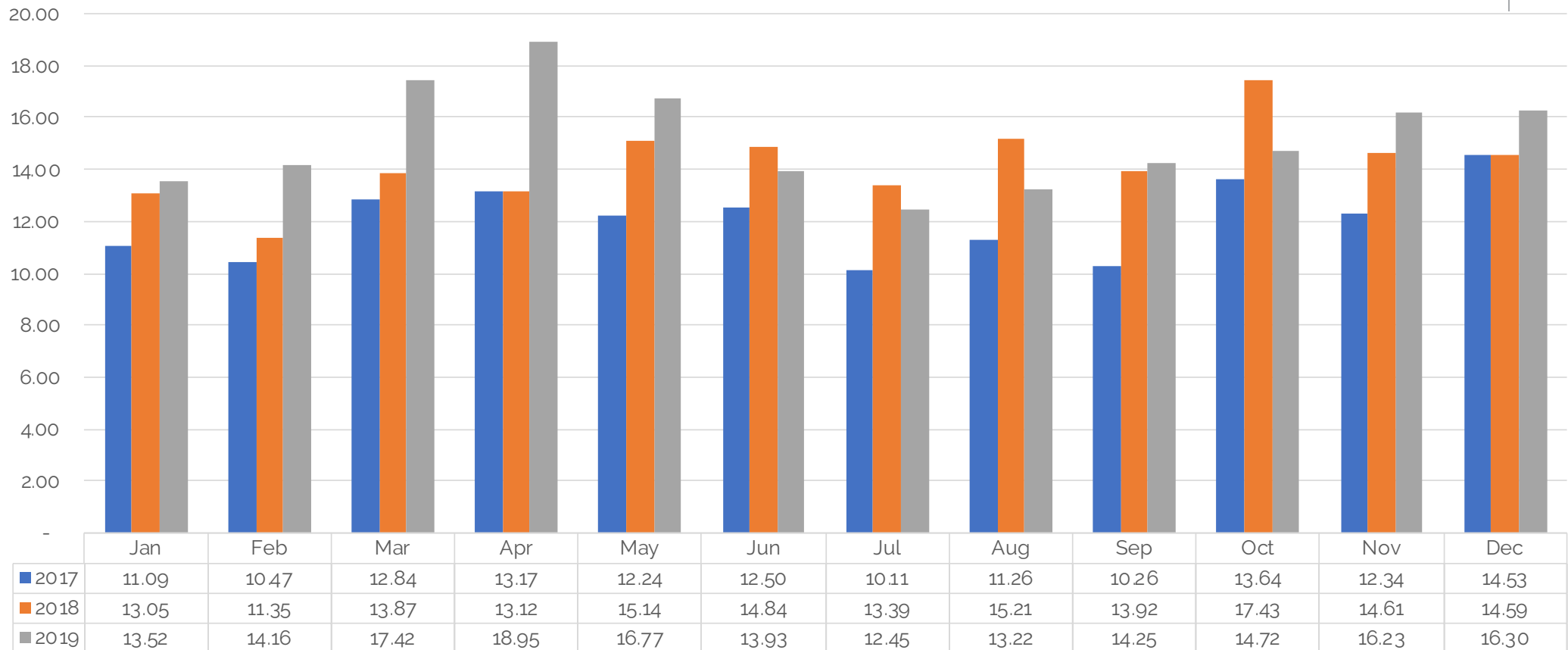
## India's Imports – Coal & Coke (MoM)



India's Coal & Coke Import (Million Metric Tons)						
	Dec-19	Dec-18	% Change	CY 2019	CY 2018	% Change
<b>COKING COAL</b>	4.75	5.28	(9.96)%	48.84	52.03	(6.13)%
<b>THERMAL COAL</b>	16.30	14.59	11.71 %	181.93	170.53	6.69 %
<b>ANTHRACITE</b>	0.13	0.13	4.68 %	2.00	1.67	19.41 %
<b>PCI COAL</b>	0.97	0.72	34.27 %	12.68	8.48	49.52 %
<b>MET COKE</b>	0.17	0.37	(53.83)%	3.25	5.46	(40.58)%
<b>PET COKE</b>	0.67	0.69	(3.19)%	11.33	6.83	65.93 %
<b>TOTAL</b>	<b>22.98</b>	<b>21.77</b>	<b>5.57 %</b>	<b>260.01</b>	<b>244.99</b>	<b>6.13 %</b>

- ❖ Thermal Coal imports touched a new all time high in CY 2019
- ❖ The Indian steel mills are modernized. Usage of PCI increased in the BF, reducing coking coal & met coke imports.
- ❖ In Oct 2018, Indian Supreme Court restricted use of Pet Coke to Cement industry

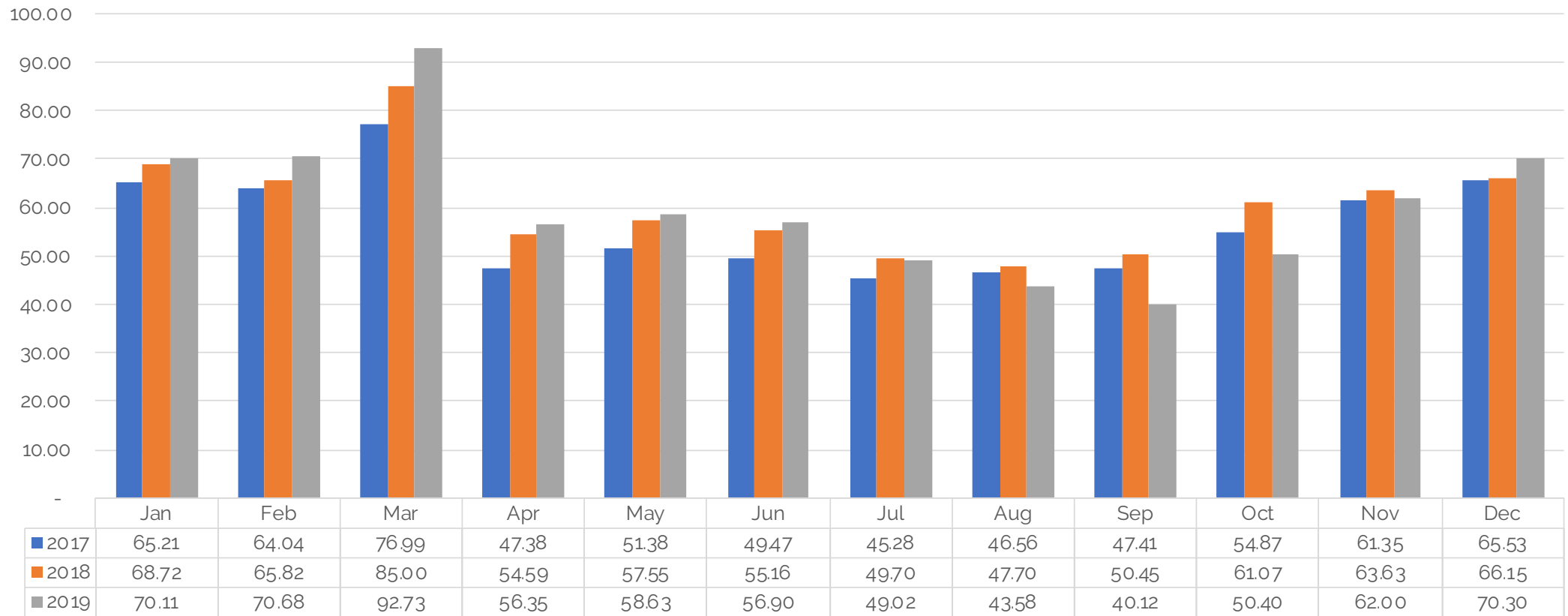
# India's Imports – Thermal Coal Monthly (MMT)



- ❖ In 1H CY 2019 thermal coal imports grew strongly but momentum lost pace from June, but momentum seems to back from November 2019
- ❖ November imports show a modest revival in import growth. But December shows double digit growth

# India's Production – Coal Monthly (MMT)

Source : Office of Economic Advisory

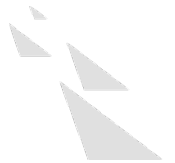


- ❖ From April to November 2019, Indian coal production has been falling.. Notably imports were also falling during the same period., pointing to sharp slowdown in the economy.. But both domestic production and imports are on the rise again signaling an economic recovery

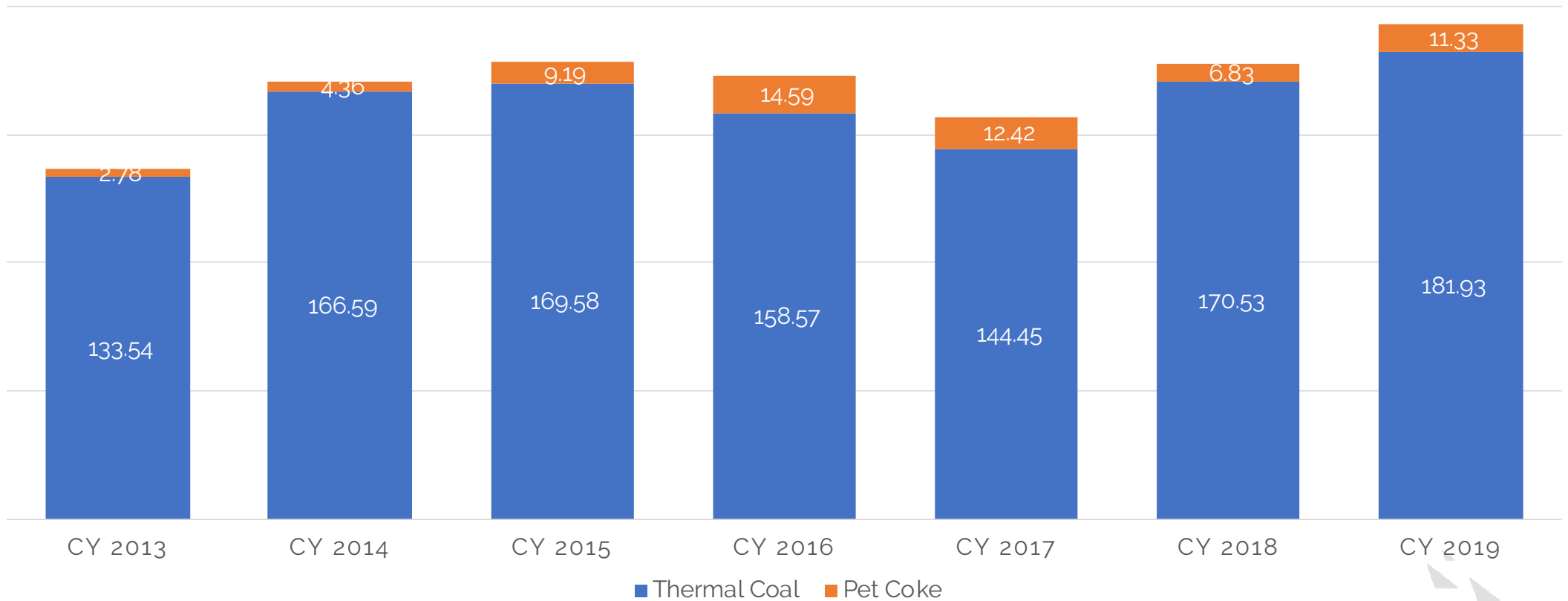


## Section - 2

## Solid Fuels - Imports Overview



# India's Solid Fuel Imports (MMT)





## India's Thermal Coal Imports (MoM)

India's Thermal Import (Metric Tons)						
	Dec-19	Dec-18	% Change	CY 2019	CY 2018	% Change
AUSTRALIA	390,608	203,757	91.70 %	3,713,663	4,968,729	(25.26)%
BHUTAN	449			449		
COLOMBIA				672,212	497,035	35.24 %
INDONESIA	10,468,077	9,688,246	8.05 %	120,966,096	107,167,485	12.88 %
MOZAMBIQUE	201,344	568,299	(64.57)%	2,851,799	5,017,348	(43.16)%
NEW ZEALAND		51,896			51,896	
PHILIPPINES				54,550	55,000	(0.82)%
RUSSIA	304,242	235,889	28.98 %	2,815,945	1,990,711	41.45 %
SOUTH AFRICA	4,374,912	3,399,695	28.69 %	42,243,333	38,308,473	10.27 %
USA	555,683	438,724	26.66 %	8,608,585	12,470,001	(30.97)%
<b>TOTAL</b>	<b>16,295,315</b>	<b>14,586,506</b>	<b>11.71 %</b>	<b>181,926,632</b>	<b>170,526,679</b>	<b>6.69 %</b>

- ❖ Power generation companies imported Australian origin coal in 2018 and Russian origin coal in 2019.
- ❖ The Indian Cement industry shifted to Pet Coke usage after Hon'ble Supreme Court passed judgment on Pet Coke in Oct 2018, adversely affecting import of US Origin Coals by this sector. And increasing import of pet coke

# India's Thermal Coal Imports (Dec 2019)

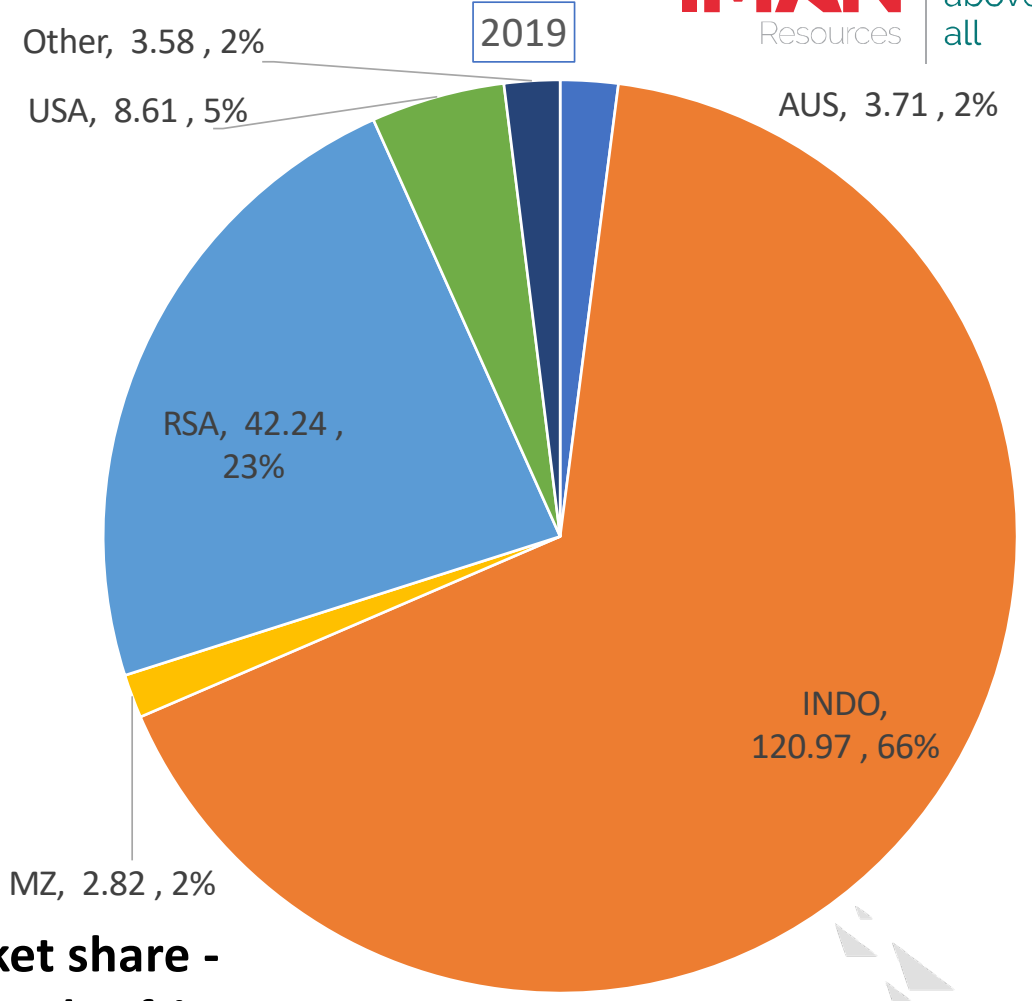
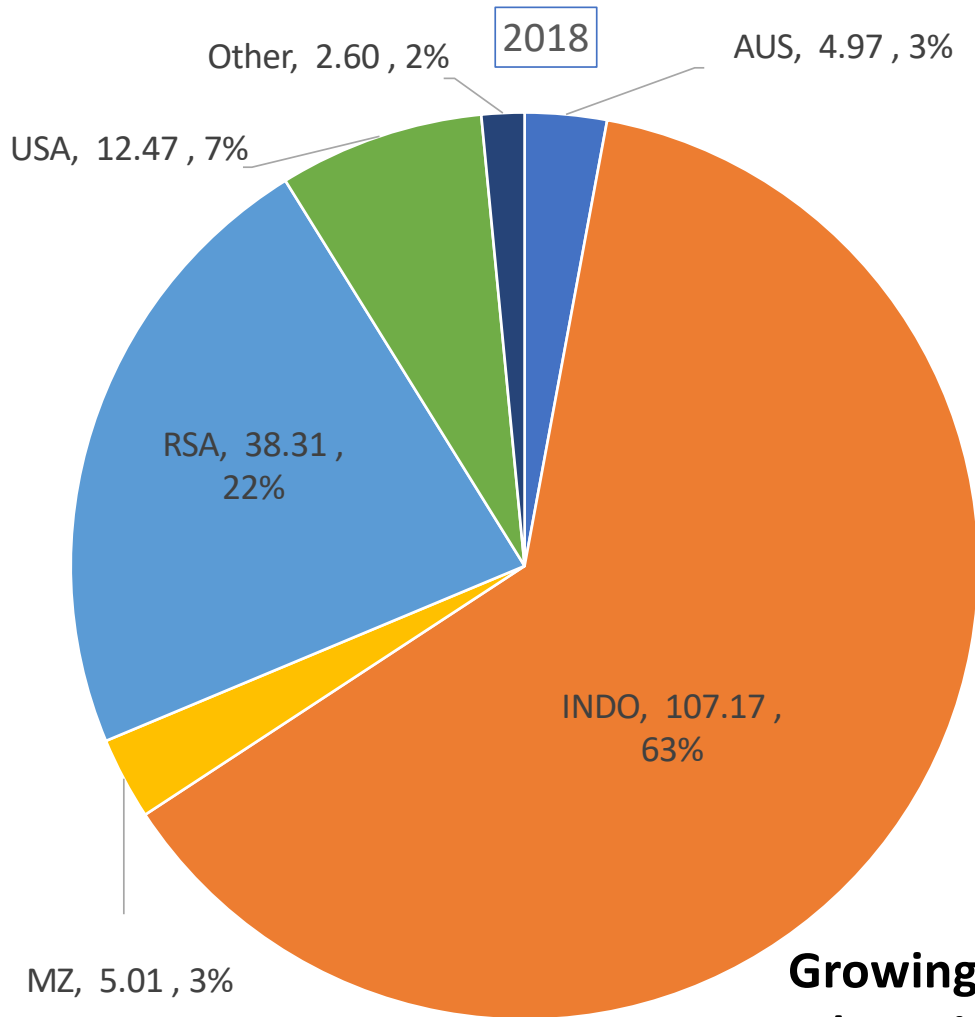
Importing Port with Coal Origin



Port	AUSTRALIA	BHUTAN	INDONESIA	MOZAMBIQUE	RUSSIA	SOUTH AFRICA	USA	Grand Total
BEDI	82,500							82,500
BHAVNAGAR			158,550				54,983	213,533
DAHANU			110,000					110,000
DAHEJ			222,880			81,825		304,705
DARRANGA		449						449
DHAMRA			52,050			481,391		533,441
DHARAMTAR			261,485					261,485
ENNORE	77,550		559,663			48,220		685,433
GANGAVARAM			165,143	38,550	77,646	1,359,326		1,640,665
HALDIA / KOLKATA			213,560			88,800	85,500	387,860
HAZIRA / MAGDALLA / SURAT			1,091,436		70,671	208,189		1,370,296
JAIGARH			170,620			360,247		530,867
KAKINADA			228,572					228,572
KANDLA / Tuna	138,853		276,805			79,133	376,700	871,491
KARAIKAL			640,593					640,593
KRISHNAPATNAM			737,190		82,420	330,000		1,149,610
MANGALORE			283,602			100,000		383,602
MORMUGAO						159,773		159,773
MUMBAI			209,566					209,566
MUNDRA			1,896,135	162,794		162,084		2,221,013
NAVLAKHI	91,705		624,630		73,505			789,840
OKHA			55,250			110,000		165,250
PARADIP			481,681			297,053		778,734
PORBANDAR			96,800			26,523		123,323
RANPAR			55,400					55,400
REVDANDA			176,480					176,480
SALAYA			487,150			163,204		650,354
TUTICORIN			608,585					608,585
VIZAG			604,251			319,144	38,500	961,895
<b>Grand Total</b>	<b>390,608</b>	<b>449</b>	<b>10,468,077</b>	<b>201,344</b>	<b>304,242</b>	<b>4,374,912</b>	<b>555,683</b>	<b>16,295,315</b>

# India's Coal Imports (MMT)

Data Format  
Origin, Quantity, Share

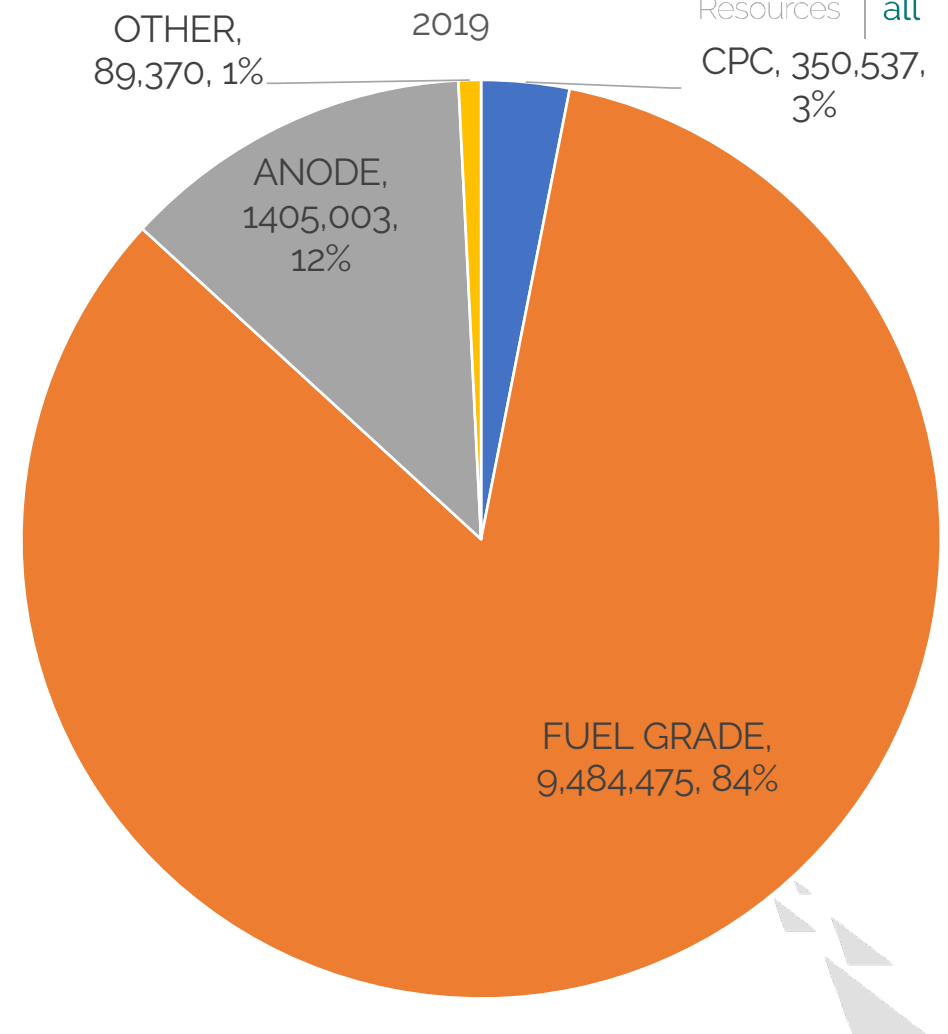
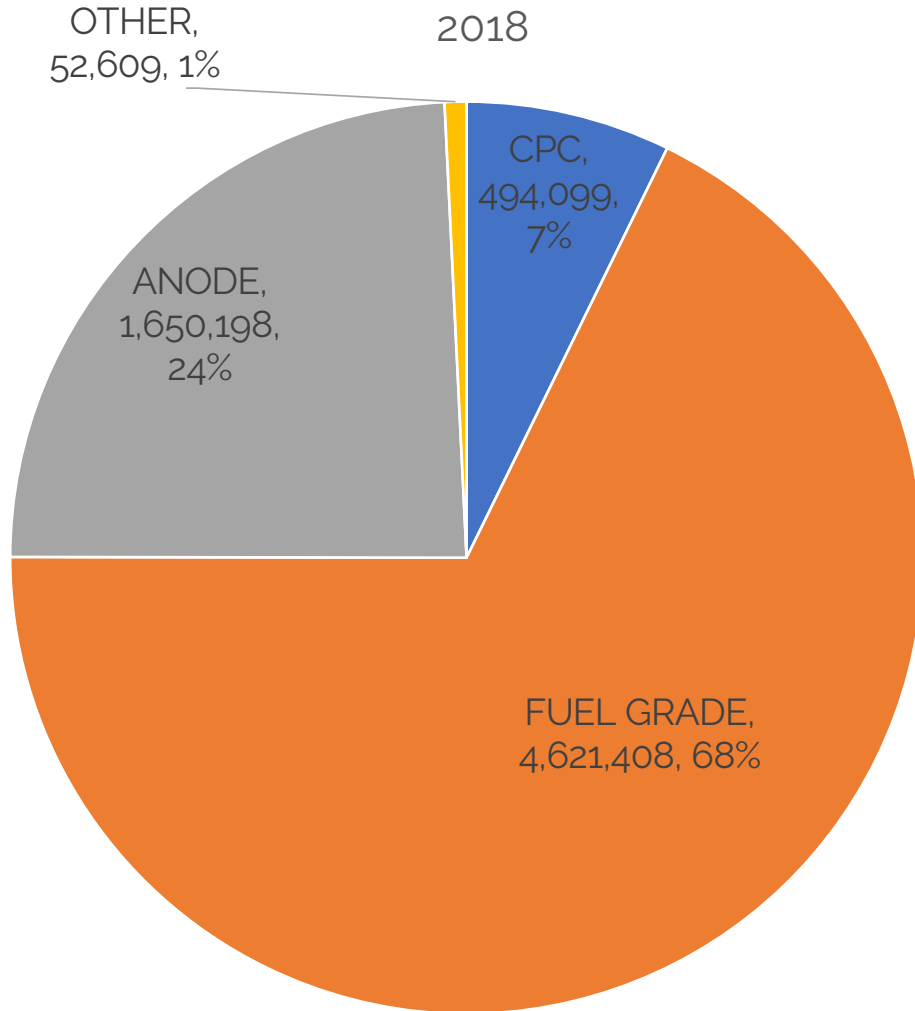


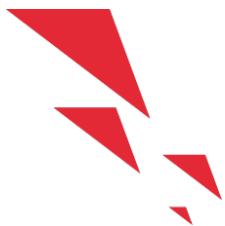
**Growing market share -  
Indonesia & South Africa**

## India's Pet Coke Imports (MoM)

India's Pet Coke Import (Metric Tons)						
	Dec-19	Dec-18	% Change	CY 2019	CY 2018	% Change
USA	383,943	291,105	31.89 %	5836,446	3,073,935	89.87 %
SAUDI ARABIA	164,470	219,414	(25.04)%	3513,778	2,164,618	62.33 %
CHINA	,507	30,274	(98.33)%	661,867	675,698	(2.05)%
OMAN	55,352	27,418	101.88 %	357,754	82,418	334.07 %
CANADA				149,439		
KUWAIT		32,997		141,599	214,218	(33.90)%
INDONESIA	31,161	43,013	(27.55)%	146,328	251,409	(41.80)%
Other	31,789	44,975	(29.32)%	522,220	364,968	43.09 %
<b>TOTAL</b>	<b>667,222</b>	<b>689,196</b>	<b>(3.19)%</b>	<b>11,329,431</b>	<b>6,827,264</b>	<b>65.94 %</b>

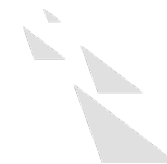
# India's Pet Coke Imports (Grade Wise)





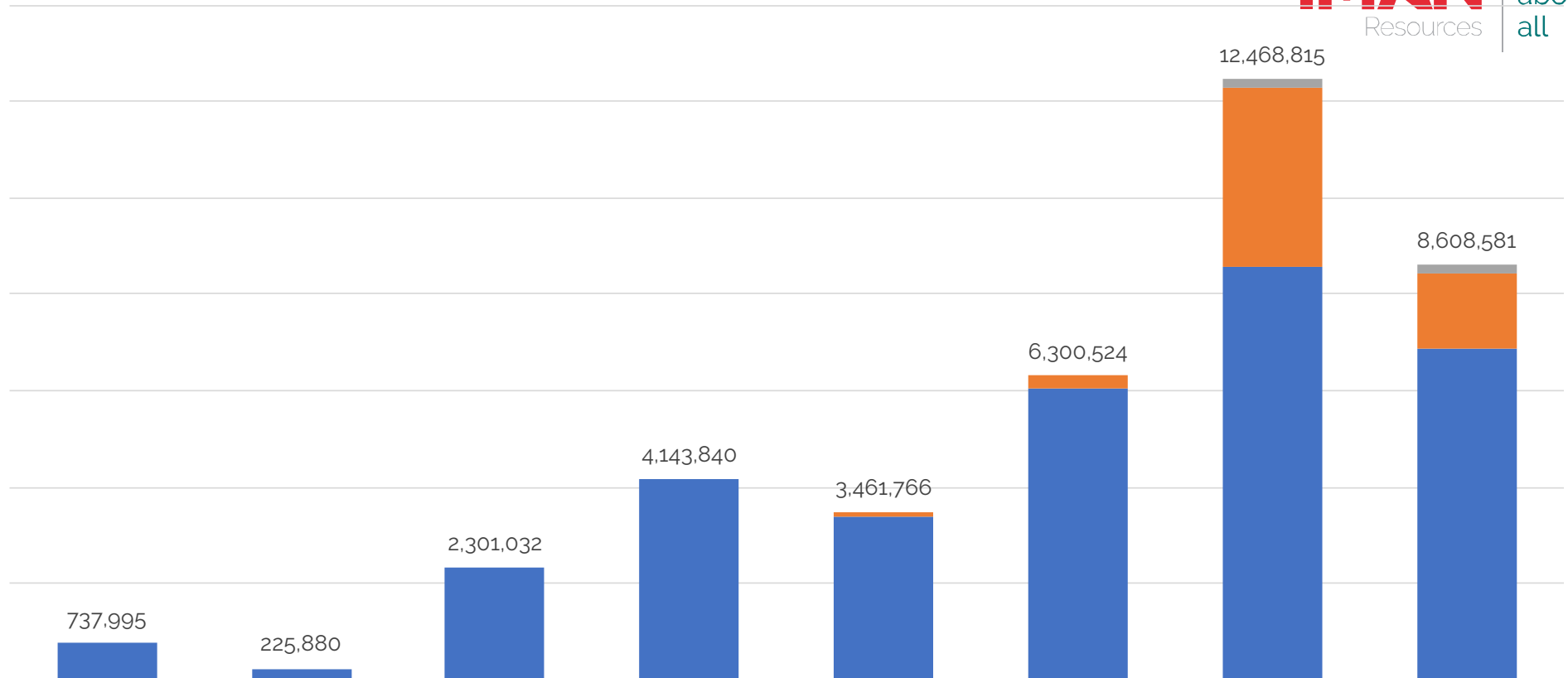
## Section - 3

## US Thermal Coal - Imports Overview



# US Thermal Coal Imports – Quality Wise

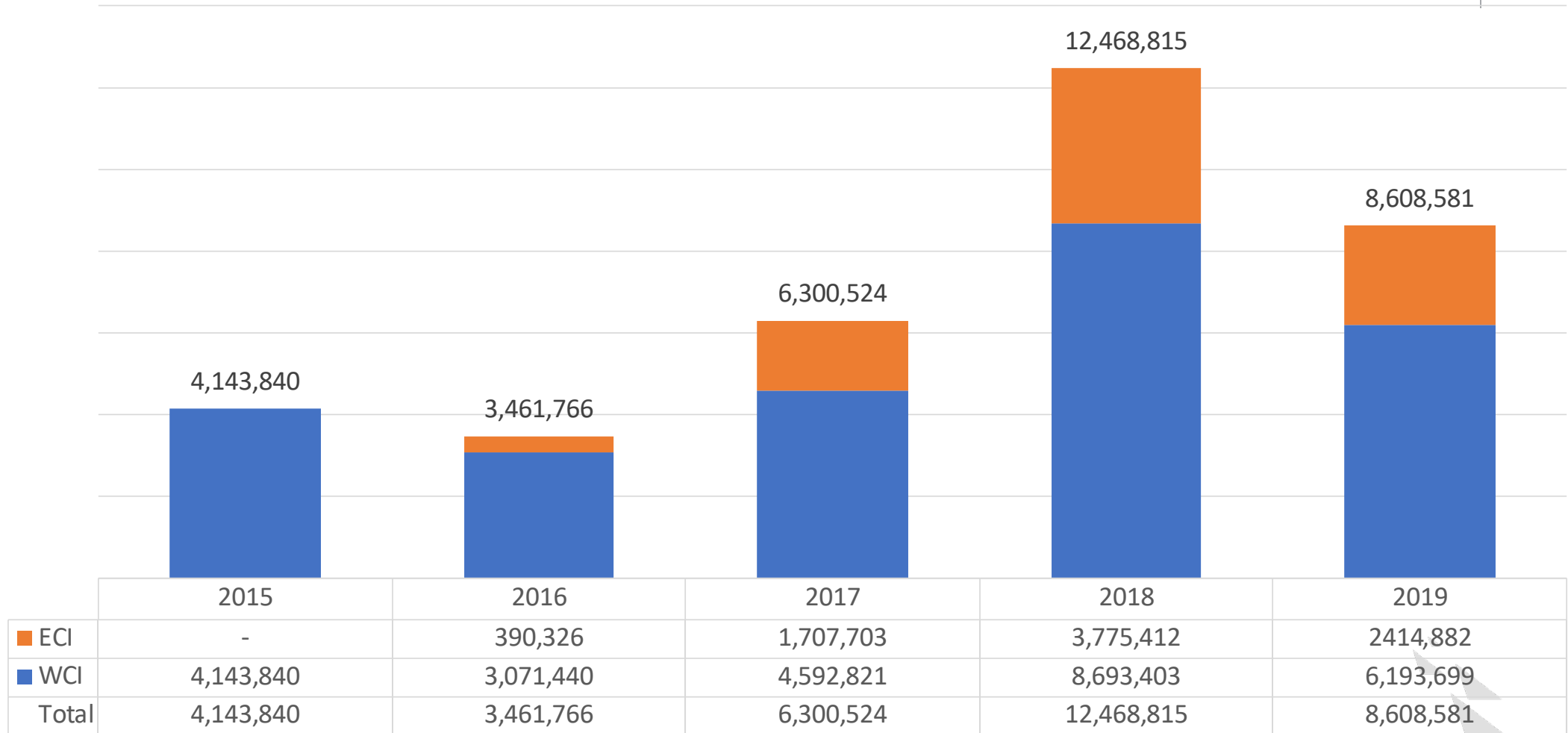
(Data based on Arrival of Vessels at Discharge port / in MT)



	2012	2013	2014	2015	2016	2017	2018	2019
■ PRB/Utah							162,224	160,405
■ ILB					77,067	237,380	3,740,334	1,578,688
■ NAPP	737,995	225,880	2,301,032	4,143,840	3,384,699	6,063,144	8,566,257	6,869,488
Total	737,995	225,880	2,301,032	4,143,840	3,461,766	6,300,524	12,468,815	8,608,581

# US Thermal Coal Imports – ECI/WCI Wise

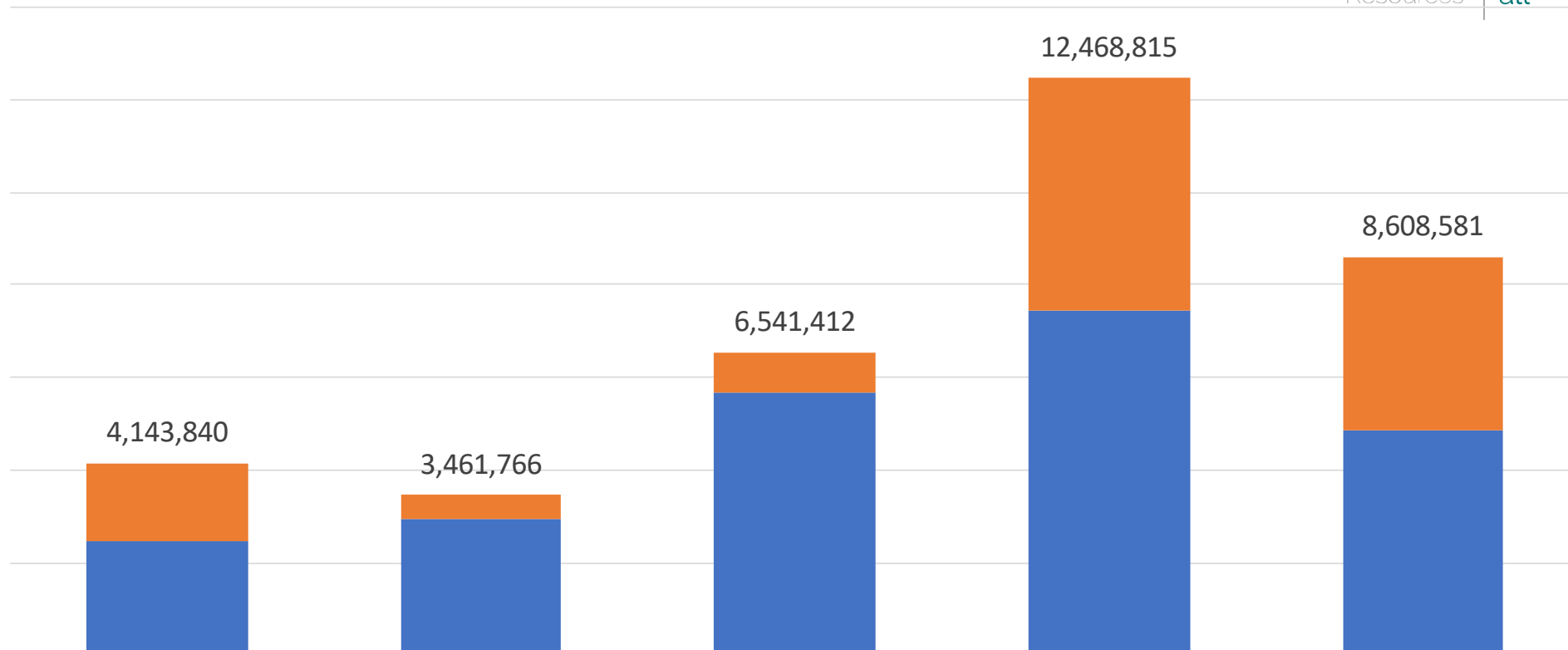
(Data based on Arrival of Vessels at Discharge port / in MT)





# US Thermal Coal Imports – Segment Wise

(Data based on Arrival of Vessels at Discharge port / in MT)



	2015	2016	2017	2018	2019
End Users	1,696,725	516,014	871,747	5,028,271	3,739,836
Traders	2,447,115	2,945,752	5,669,665	7,440,543	4,868,745
Total	4,143,840	3,461,766	6,541,412	12,468,815	8,608,581

## US Thermal Coal Imports (by Consumer)



Trust  
above  
all

	2018	2019
<b>Cement</b>	<b>4,185,084</b>	<b>3,454,578</b>
SHREE CEMENT LIMITED	1,387,895	434,262
ULTRATECH CEMENT LIMITED	939,531	1,438,771
THE INDIA CEMENTS LIMITED	734,173	660,694
OTHER	1,123,485	920,851
<b>Power</b>	<b>843,187</b>	<b>285,258</b>
VEDANTA LIMITED	407,694	<b>285,258</b>
NAYARA ENERGY	162,224	
TATA POWER	151,634	
JINDAL STEEL & POWER LIMITED	121,635	
<b>Traders</b>	<b>7,440,543</b>	<b>4,868,745</b>



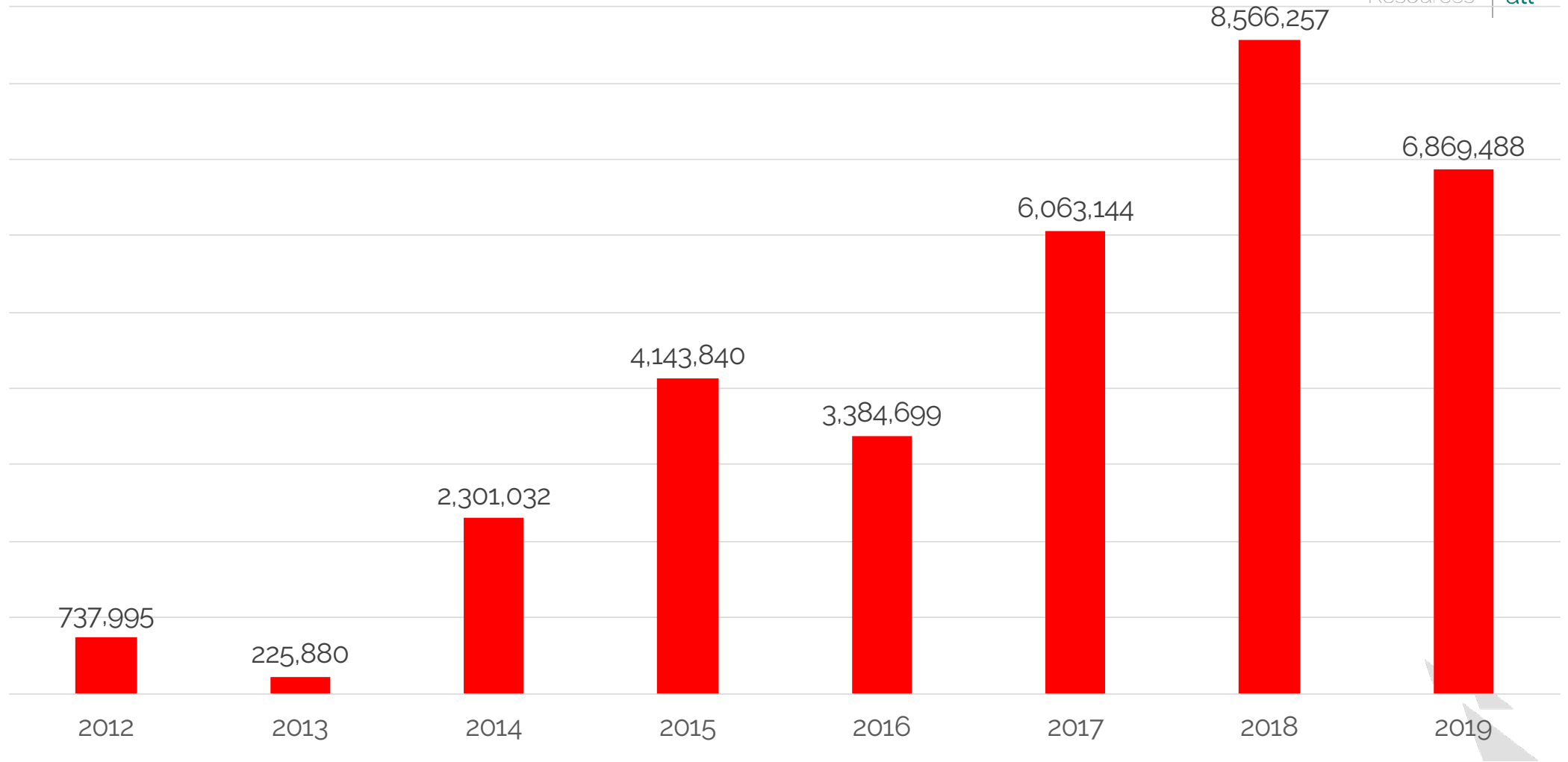
## Section - 4

## US NAPP Coal - Imports Overview



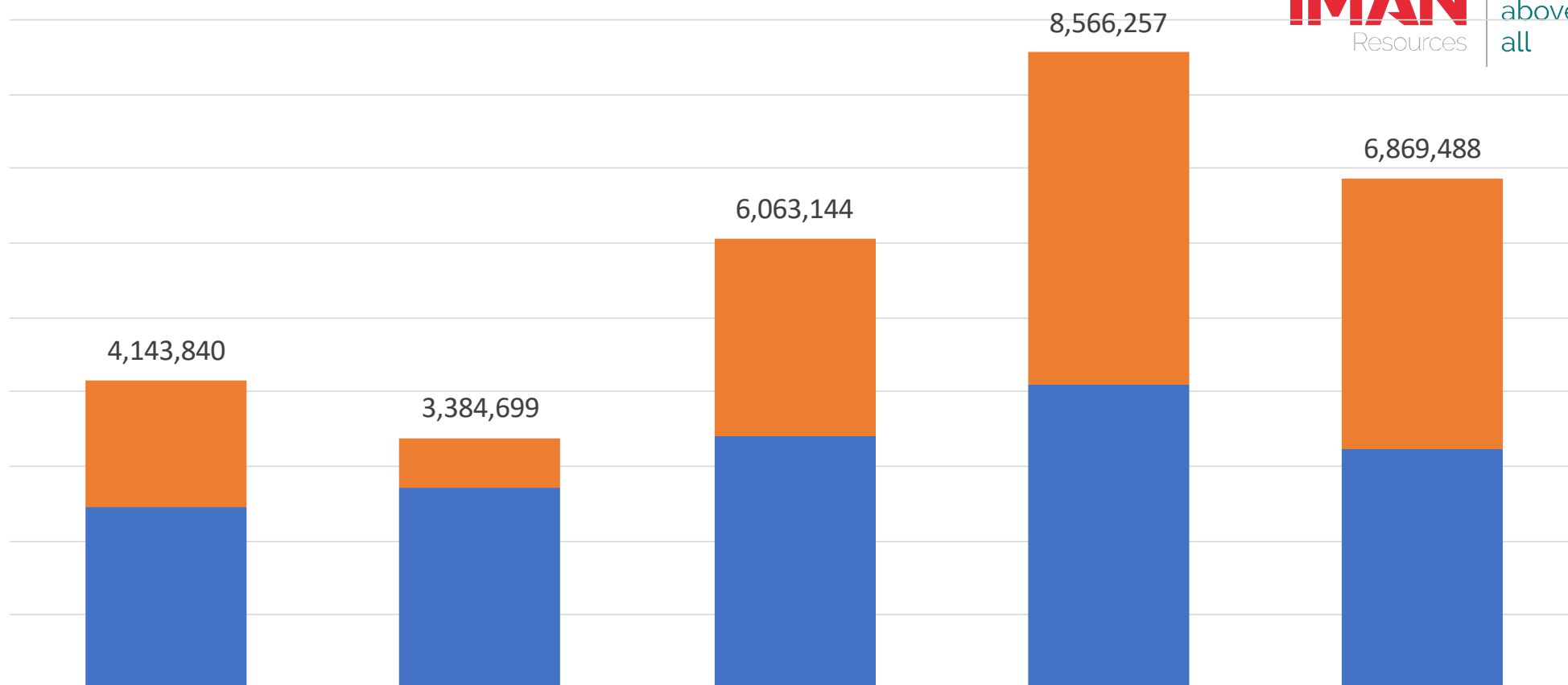
# Total NAPP Coal Imports to India

(Data based on Arrival of Vessels at Discharge port / in MT)



# NAPP Coal / Retail vs Industrial Sales

(Data based on Arrival of Vessels at Discharge port / in MT)

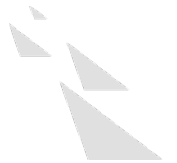


	2015	2016	2017	2018	2019
Industry	1,701,074	666,345	2,674,872	4,459,602	3,634,919
Retail	2,442,766	2,718,354	3,388,272	4,106,655	3,234,569
<b>Total</b>	<b>4,143,840</b>	<b>3,384,699</b>	<b>6,063,144</b>	<b>8,566,257</b>	<b>6,869,488</b>



## Section - 5

## Coking Coal - Imports Overview



# India's Coking Coal Imports (MoM)

## India's Coking Coal Import (Metric Tons)

	<b>Dec-19</b>	<b>Dec-18</b>	<b>% Change</b>	<b>CY 2019</b>	<b>CY 2018</b>	<b>% Change</b>
<b>AUSTRALIA</b>	3,780,584	3,805,379	(0.65)%	35,965,080	39,862,041	(9.78)%
<b>CANADA</b>	260,759	362,729	(28.11)%	4,894,612	4,397,079	11.32 %
<b>COLOMBIA</b>				16,870	11,500	46.70 %
<b>INDONESIA</b>	107,684	431,720	(75.06)%	1,199,011	898,594	33.43 %
<b>MOZAMBIQUE</b>	115,446	270,529	(57.33)%	1,952,598	1,709,425	14.23 %
<b>NEW ZEALAND</b>	26,268	47,790	(45.03)%	296,012	287,245	3.05 %
<b>RUSSIA</b>		13,000		300,820	377,434	(20.30)%
<b>USA</b>	460,773	346,009	33.17 %	4,213,033	4,482,953	(6.02)%
<b>TOTAL</b>	<b>4,751,513</b>	<b>5,277,156</b>	<b>(9.96)%</b>	<b>48,838,035</b>	<b>52,026,270</b>	<b>(6.13)%</b>

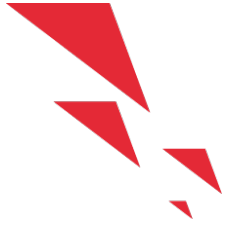
# India's Coking Coal Imports (Dec 2019)

## Importing Port with Coal Origin



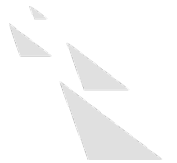
Port	AUSTRALIA	CANADA	INDONESIA	MOZAMBIQUE	NEW ZEALAND	USA	Total
DHAMRA	720,758					46,000	<b>766,758</b>
ENNORE	27,500						<b>27,500</b>
GANGAVARAM	244,651	77,050				40,000	<b>361,701</b>
HALDIA / KOLKATA	576,109					120,806	<b>696,915</b>
JAIGARH	218,212	78,239					<b>296,450</b>
KANDLA / Tuna	133,308					78,262	<b>211,570</b>
KARAIKAL	76,406						<b>76,406</b>
KRISHNAPATNAM	374,808						<b>374,808</b>
MORMUGAO	279,204	105,470				83,304	<b>467,978</b>
OKHA	12,463						<b>12,463</b>
PARADIP	760,673		107,684		26,268		<b>894,625</b>
VIZAG	356,492			115,446		92,401	<b>564,339</b>
<b>Total</b>	<b>3,780,584</b>	<b>260,759</b>	<b>107,684</b>	<b>115,446</b>	<b>26,268</b>	<b>460,773</b>	<b>4,751,513</b>





## Section - 6

## PCI - Imports Overview



## India's PCI Imports (MoM)



### India's PCI Import (Metric Tons)

	Dec-19	Dec-18	% Change	CY 2019	CY 2018	% Change
AUSTRALIA	876,925	532,097	64.81 %	8,923,566	6,400,572	39.42 %
CANADA		32,669		263,096	132,750	98.19 %
RUSSIA	90,004	155,357	(42.07)%	3,493,931	1,947,225	79.43 %
<b>TOTAL</b>	<b>966,929</b>	<b>720,123</b>	<b>34.27 %</b>	<b>12,680,593</b>	<b>8,480,547</b>	<b>49.53 %</b>



# India's PCI Imports (Brand Wise)

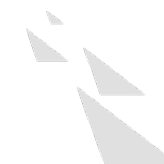


India's PCI Import (Metric Tons)						
	Dec-19	Dec-18	% Change	CY 2019	CY 2018	% Change
<b>AUSTRALIA</b>	876,925	532,097	64.81 %	8,923,566	6,400,572	39.42 %
BHP 17% VM PCI COAL				57,228	33,530	
BHP 19% VM PCI COAL	25,468			183,471		
CAPRICORN PCI COAL	153,550	32,806		807,632	297,039	
CENTURY PCI COAL				102,904	561,577	
CURRAGH 10 PCT ASH PCI COAL				234,944	103,710	
EMERALD PCI COAL					52,274	
JELLINBAH PCI COAL	175,578	204,607		2230,753	2065,128	
LAKE VERMONT PCI COAL	94,315			810,924	505,014	
LOW ASH PCI COAL (TSL PCI 8)	111,002	81,068		1,002,929	511,665	
MIDDLEMOUNT PCI COAL	75,026			441,779		
NARRABRI PCI COAL IN BULK				78,629		
PCI COAL IN BULK	6,174	93,133		437,767	352,285	
PEAK DOWNS NORTH PCI COAL		21,427		70,448	321,128	
PEGASUS PCI COAL				76,838		
POITREL PCI COAL	159,909	99,056		1,498,009	1127,564	
SOUTH WALKER PCI COAL	75,903			628,028	201,430	
WERRIS CREEK LOW ASH PCI COAL				233,200	157,710	
YARRABEE PCI COAL				28,083	110,518	

# India's PCI Imports (Brand Wise)



India's PCI Import (Metric Tons)						
	Dec-19	Dec-18	% Change	CY 2019	CY 2018	% Change
<b>CANADA</b>		32,669	-100.00%	263,096	132,750	98.19 %
BRULE LV PCI COAL					79,500	
PCI COAL IN BULK				74,185		
TECK CRO PCI SOFT COKING COAL		32,669		188,911	53,250	
<b>RUSSIA</b>	90,004	155,357	-42.07%	3,493,931	1,947,225	79.43 %
BEREZOVSKY PCI COAL					101,932	
HV PCI COAL IN BULK (Baove 25 VM)				11,400	34,540	
KRASNY BROD PCI COAL				891,331	310,276	
MV PCI COAL IN BULK (12 to 18 % VM )				96,080	156,807	
PCI COAL IN BULK	80,588	155,357		2,485,704	1,343,670	
KIYZASSKY LV PCI COAL	9,416			9,416		





Write us for any question and feedback

[iman@iman-resources.com](mailto:iman@iman-resources.com)

[linus@iman-resources.com](mailto:linus@iman-resources.com)



+971 50 219 3120



+91 98306 87087



+1 703 609 4422



[www.iman-resources.com](http://www.iman-resources.com)

