



IMAN Report

India's Import – Coal & Coke

July 2019



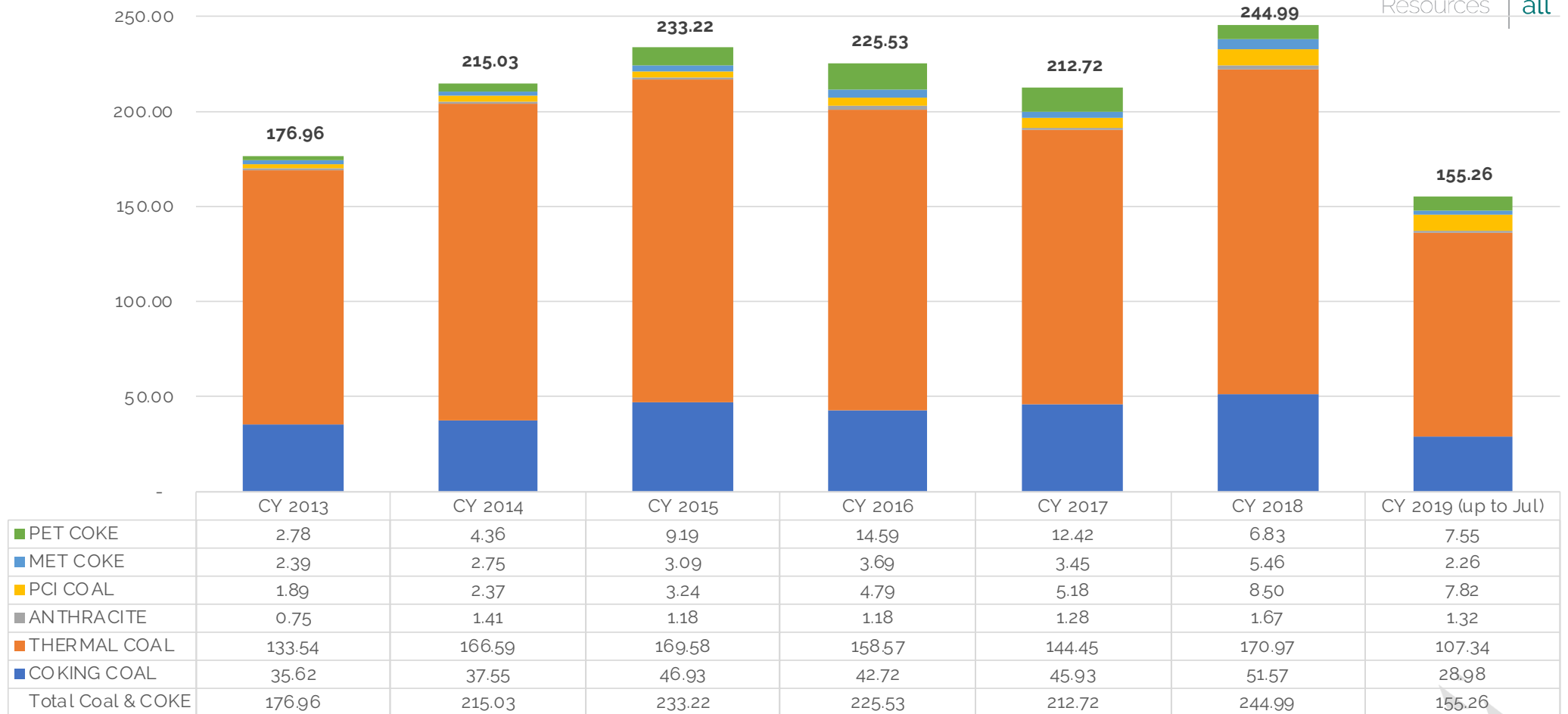


Section - 1

India – Total Imports Overview



India's Imports – Coal & Coke (MMT)



- India's import of fuel continues to grow after the 2 years continued fall in CY 2016 and CY20 17

India's Imports – Coal & Coke (MoM)



India's Coal & Coke Import (Million Metric Tons)						
	Jul-19	Jul-18	% Change	YTD 2019	YTD 2018	% Change
COKING COAL	4.852	4.838	0.30 %	28.979	30.723	(5.68)%
THERMAL COAL	12.127	13.388	(9.42)%	107.337	95.030	12.95 %
ANTHRACITE	0.223	0.102	119.58 %	1.320	0.911	44.86 %
PCI COAL	1.065	0.725	46.91 %	7.821	4.910	59.28 %
MET COKE	0.318	0.448	(29.08)%	2.255	3.143	(28.25)%
PET COKE	0.735	0.538	36.82 %	7.549	4.620	63.39 %
TOTAL	19.321	20.038	(3.58)%	155.262	139.338	11.43 %

The Indian steel industry is using a lot more PCI directly in blast furnaces and reducing its coking coal and met coke imports. This leads to increase in PCI imports

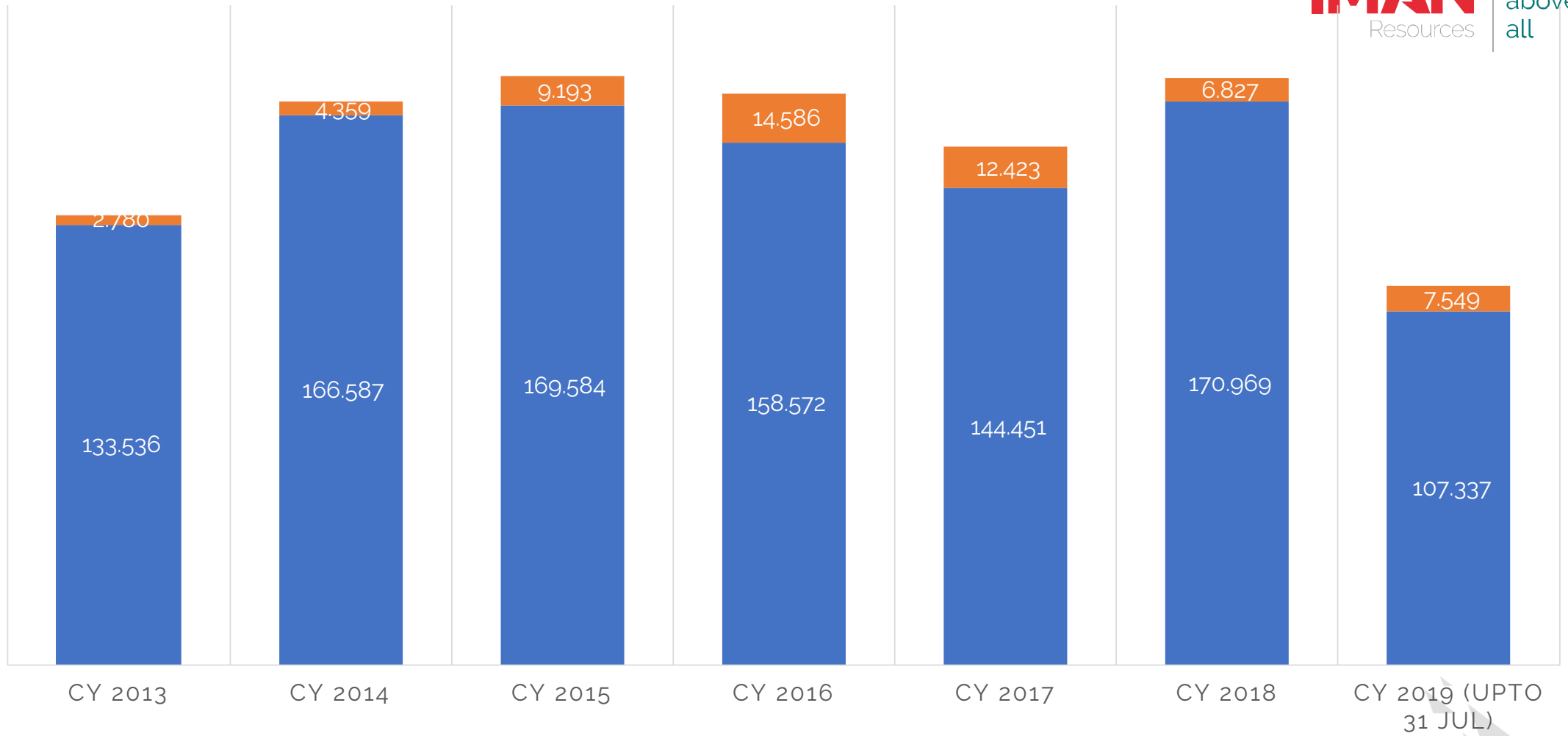


Section - 2

Solid Fuels - Imports Overview



India's Solid Fuel Imports (MMT)



India's Thermal Coal Imports (MoM)

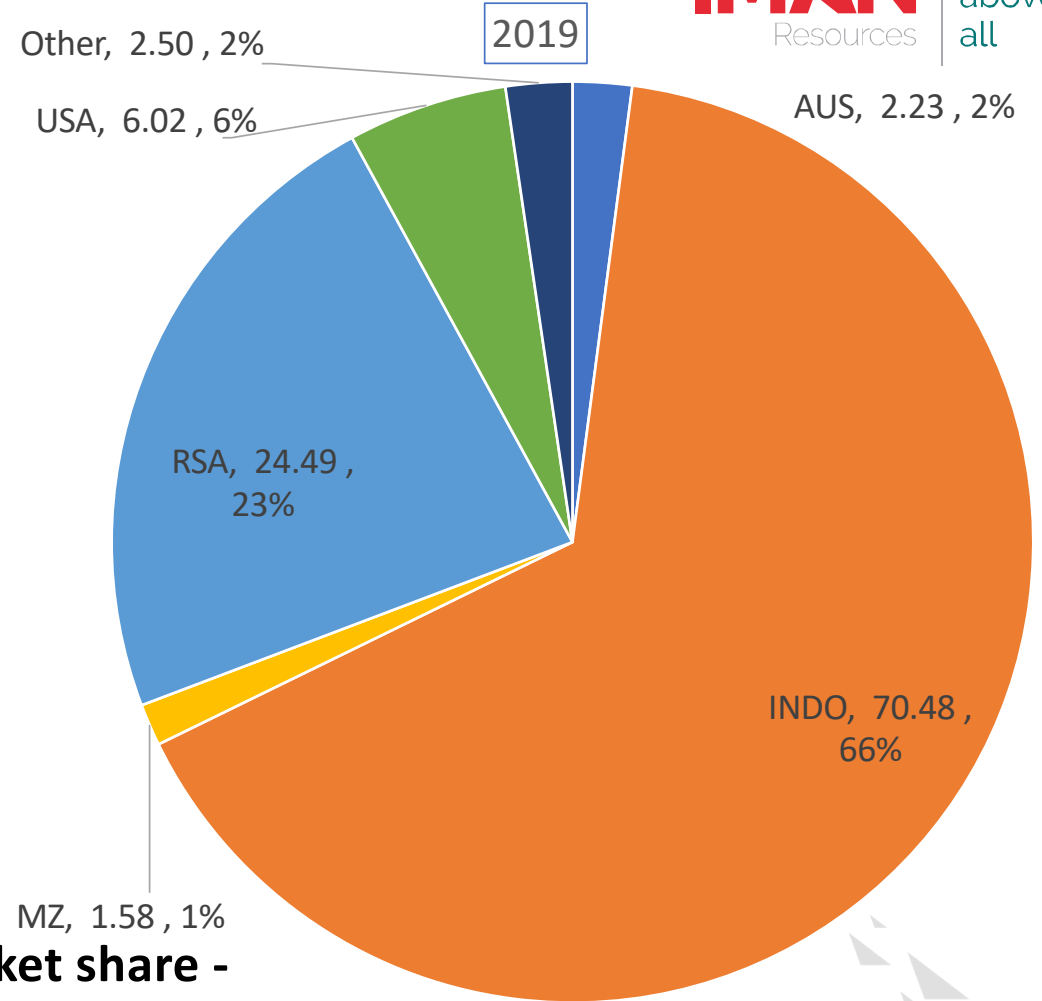
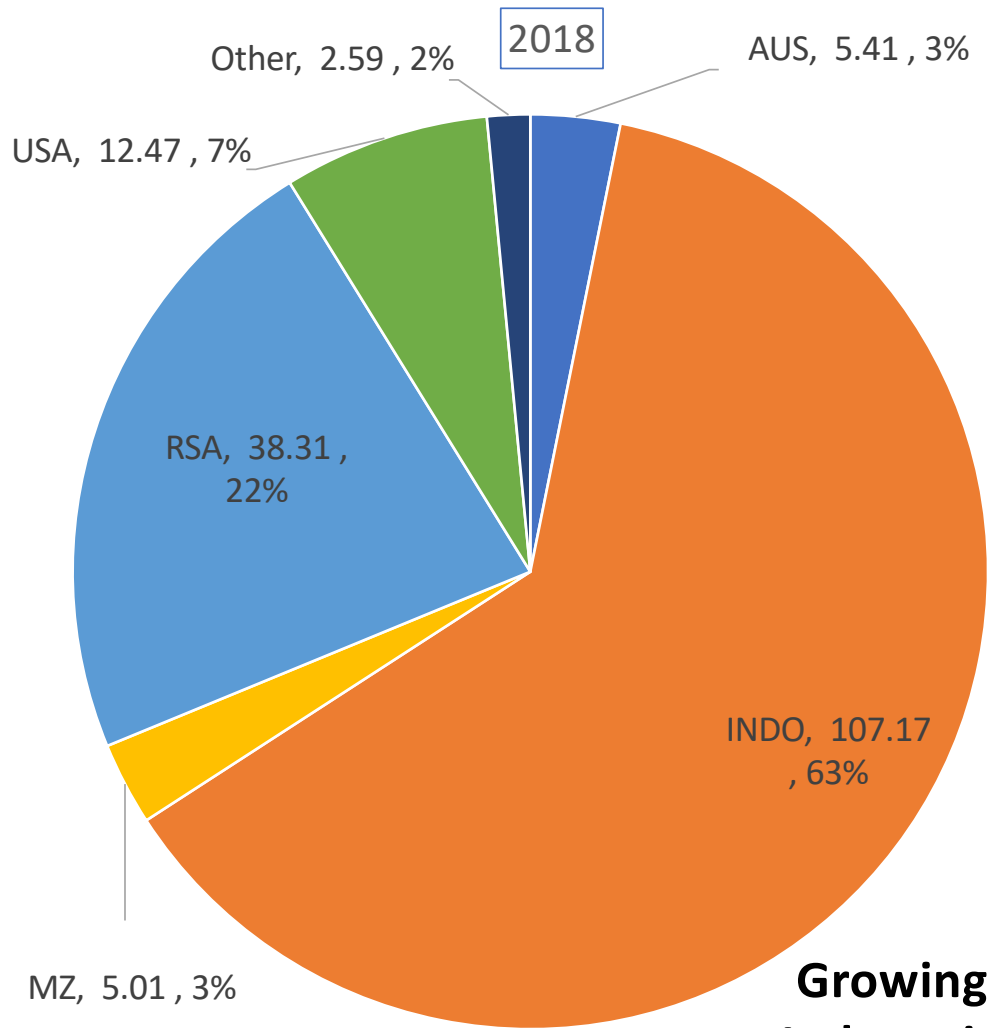
India's Thermal Import (Metric Tons)						
	Jul-19	Jul-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	80,053	591,836	(86.47)%	2,208,303	2,545,427	(13.24)%
COLOMBIA	330,484			330,484	497,035	(33.51)%
INDONESIA	7,328,443	7,266,845	0.85 %	70,492,818	56,901,398	23.89 %
MOZAMBIQUE	237,130	412,750	(42.55)%	1,658,063	2,730,304	(39.27)%
PHILIPPINES				54,550	55,000	(0.82)%
RUSSIA	480,467	135,133	255.55 %	2,117,539	1,309,425	61.72 %
SOUTH AFRICA	2,983,141	3,467,726	(13.97)%	24,449,022	22,402,942	9.13 %
USA	687,301	1,513,324	(54.58)%	6,026,602	8,588,470	(29.83)%
TOTAL	12,127,019	13,387,614	(9.42)%	107,337,381	95,030,001	12.95 %

Power generation companies have imported Australian origin coal in 2018 and Russian origin coal in 2019

The Indian Cement industry has shifted to Pet Coke use after Hon'ble Supreme Court passed judgement on petcoke in Oct 2018. This effects import of US Coal imports

India's Coal Imports (MMT)

Data Format
Origin, Quantity, Share

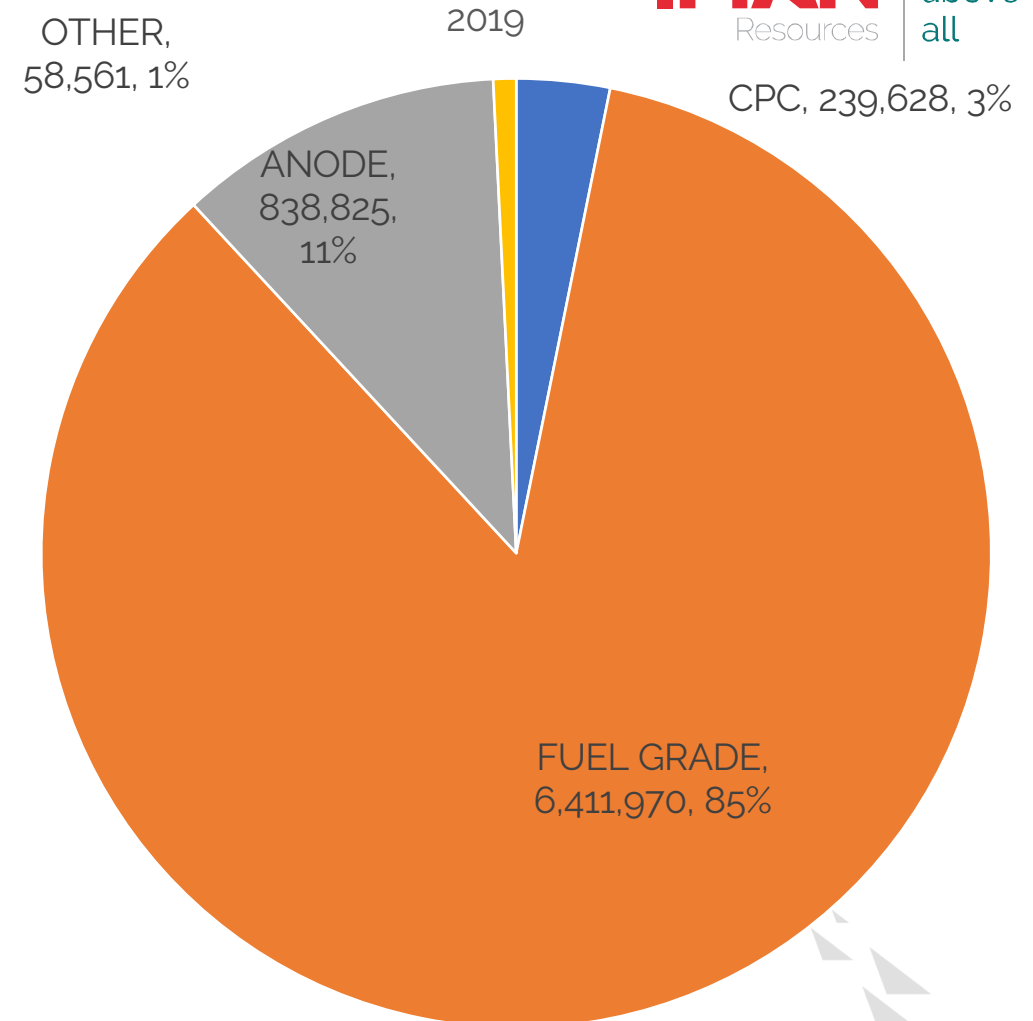
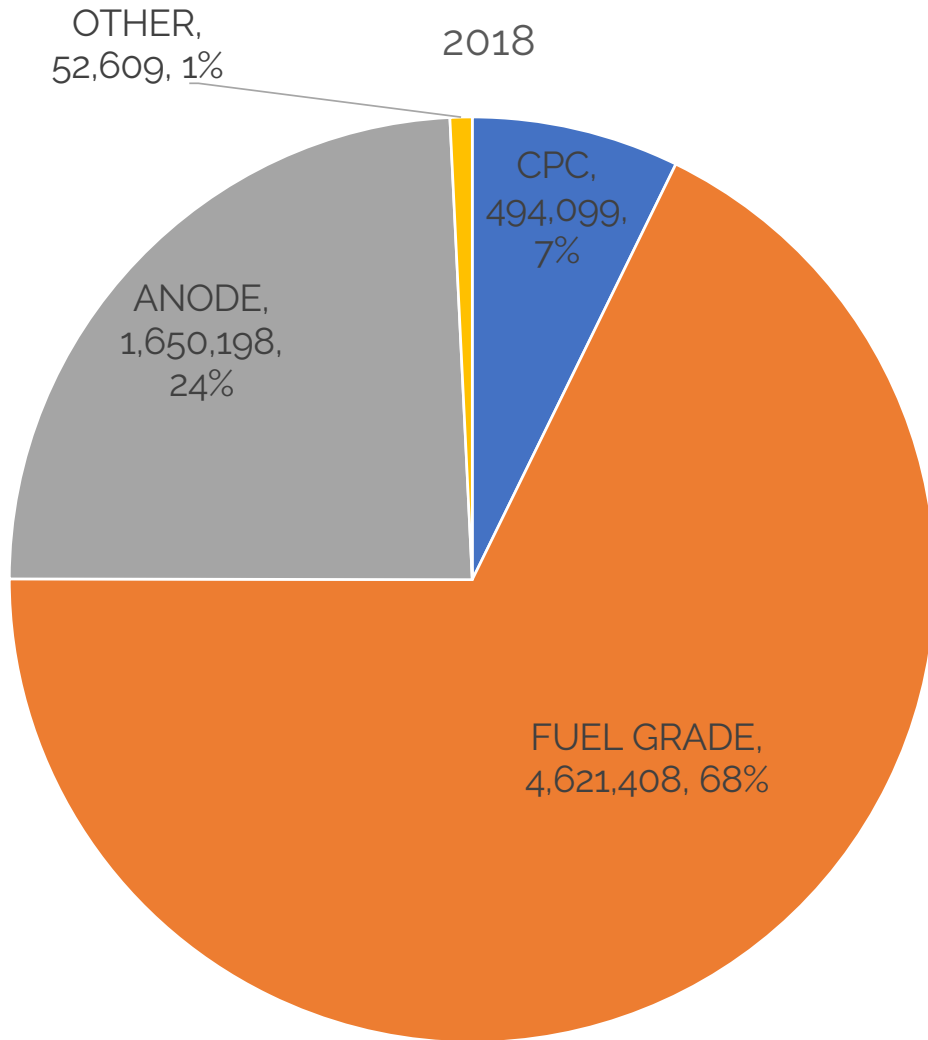


**Growing market share -
Indonesia & South Africa**

India's Pet Coke Imports (MoM)

India's Pet Coke Import (Metric Tons)						
	Jul-19	Jul-18	% Change	YTD 2019	YTD 2018	% Change
USA	307,304	229,176	34.09 %	3,821,933	2,172,877	75.89 %
SAUDI ARABIA	272,687	110,000	147.90 %	2,412,512	1,397,756	72.60 %
CHINA	67,708	35,146	92.65 %	517,991	494,167	4.82 %
KUWAIT		31,090	(100.00)%	78,351	181,221	(56.76)%
INDONESIA	36,462	42,036	(13.26)%	93,137	143,607	(35.14)%
OMAN	23,000	27,500	(16.36)%	216,490	27,500	687.24 %
CANADA				149,439		
Other	28,323	62,625	(54.77)%	259,135	203,009	27.65 %
TOTAL	735,484	537,573	36.82 %	7,548,987	4,620,137	63.39 %

India's Pet Coke Imports (Grade Wise)





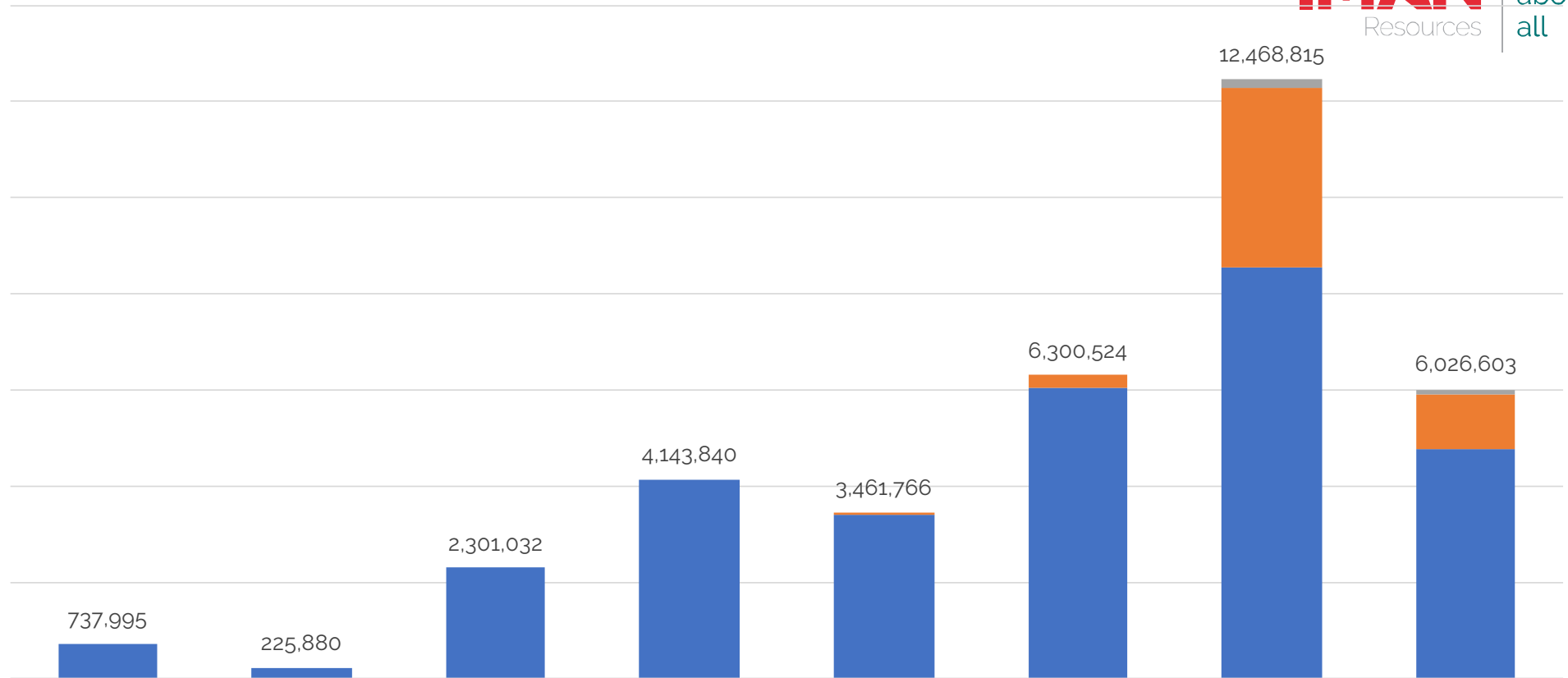
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US Thermal Coal - Imports Overview



US Thermal Coal Imports – Quality Wise

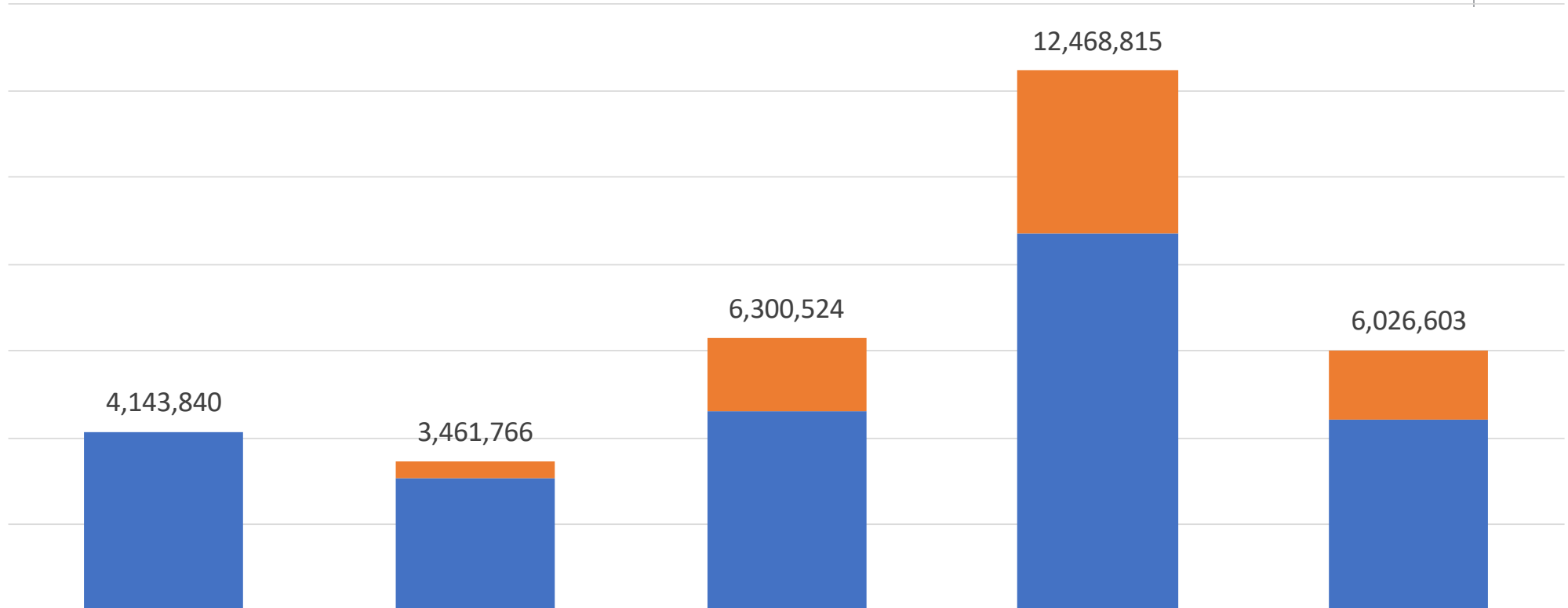
(Data based on Arrival of Vessels at Discharge port / in MT)



	2012	2013	2014	2015	2016	2017	2018	2019 (31st Jul)
■ PRB/Utah							162,224	107,465
■ ILB					77,067	237,380	3,740,334	1129,299
■ NAPP	737,995	225,880	2,301,032	4,143,840	3,384,699	6,063,144	8,566,257	4,789,839
Total	737,995	225,880	2,301,032	4,143,840	3,461,766	6,300,524	12,468,815	6,026,603

US Thermal Coal Imports – ECI/WCI Wise

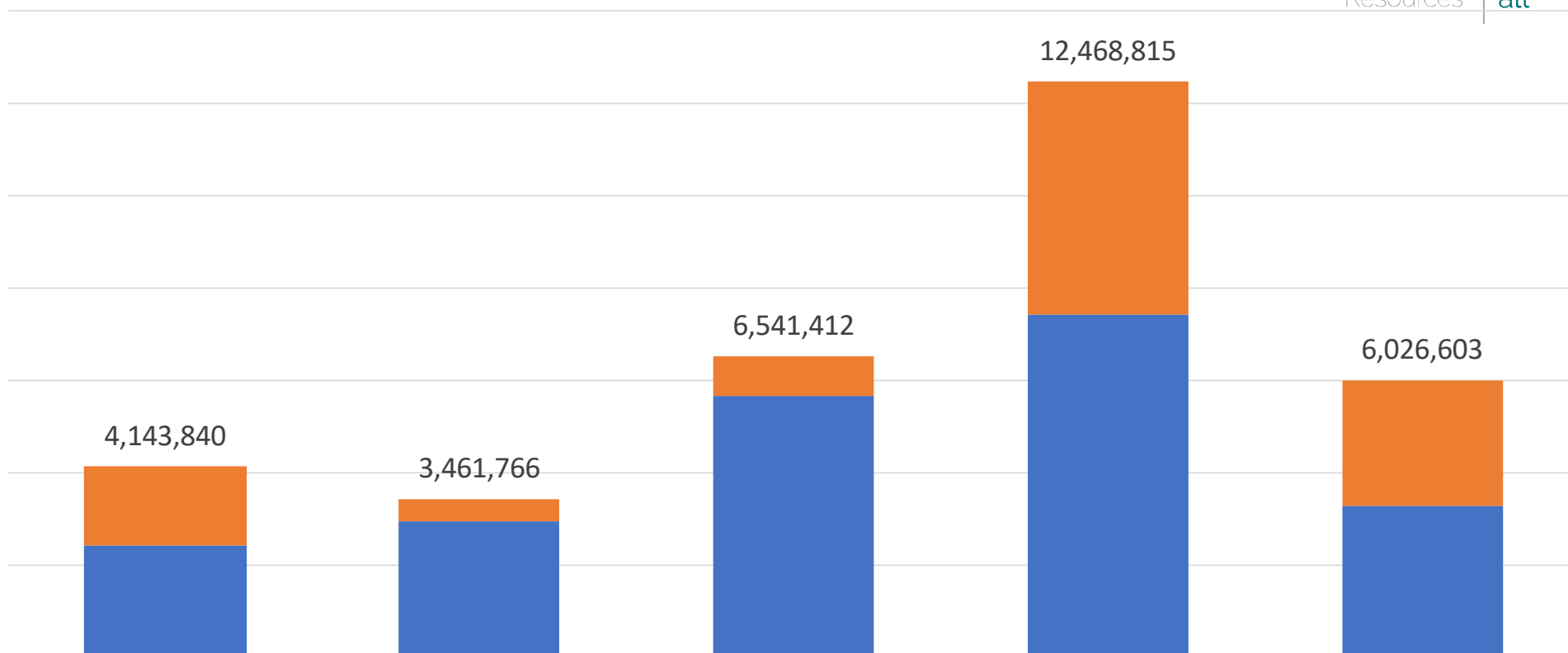
(Data based on Arrival of Vessels at Discharge port / in MT)



	2015	2016	2017	2018	2019 (31st Jul)
ECI	-	390,326	1,707,703	3,775,412	1,627,867
WCI	4,143,840	3,071,440	4,592,821	8,693,403	4,398,736
Total	4,143,840	3,461,766	6,300,524	12,468,815	6,026,603

US Thermal Coal Imports – Segment Wise

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



	2015	2016	2017	2018	2019 (31st Jul)
End Users	1,696,725	516,014	871,747	5,028,271	2,719,409
Traders	2,447,115	2,945,752	5,669,665	7,440,543	3,307,194
Total	4,143,840	3,461,766	6,541,412	12,468,815	6,026,603

US Thermal Coal Imports (by Consumer)



	2018	2019 (Up to 31 Jul)
Cement	4,185,084	2,595,893
SHREE CEMENT LIMITED	1,387,895	434,262
ULTRATECH CEMENT LIMITED	939,531	1,060,846
THE INDIA CEMENTS LIMITED	734,173	468,516
OTHER	1,123,485	631,230
Power	843,187	124,550
VEDANTA LIMITED	407,694	124,550
NAYARA ENERGY	162,224	
TATA POWER	151,634	
JINDAL STEEL & POWER LIMITED	121,635	
Traders	7,440,543	3,307,194



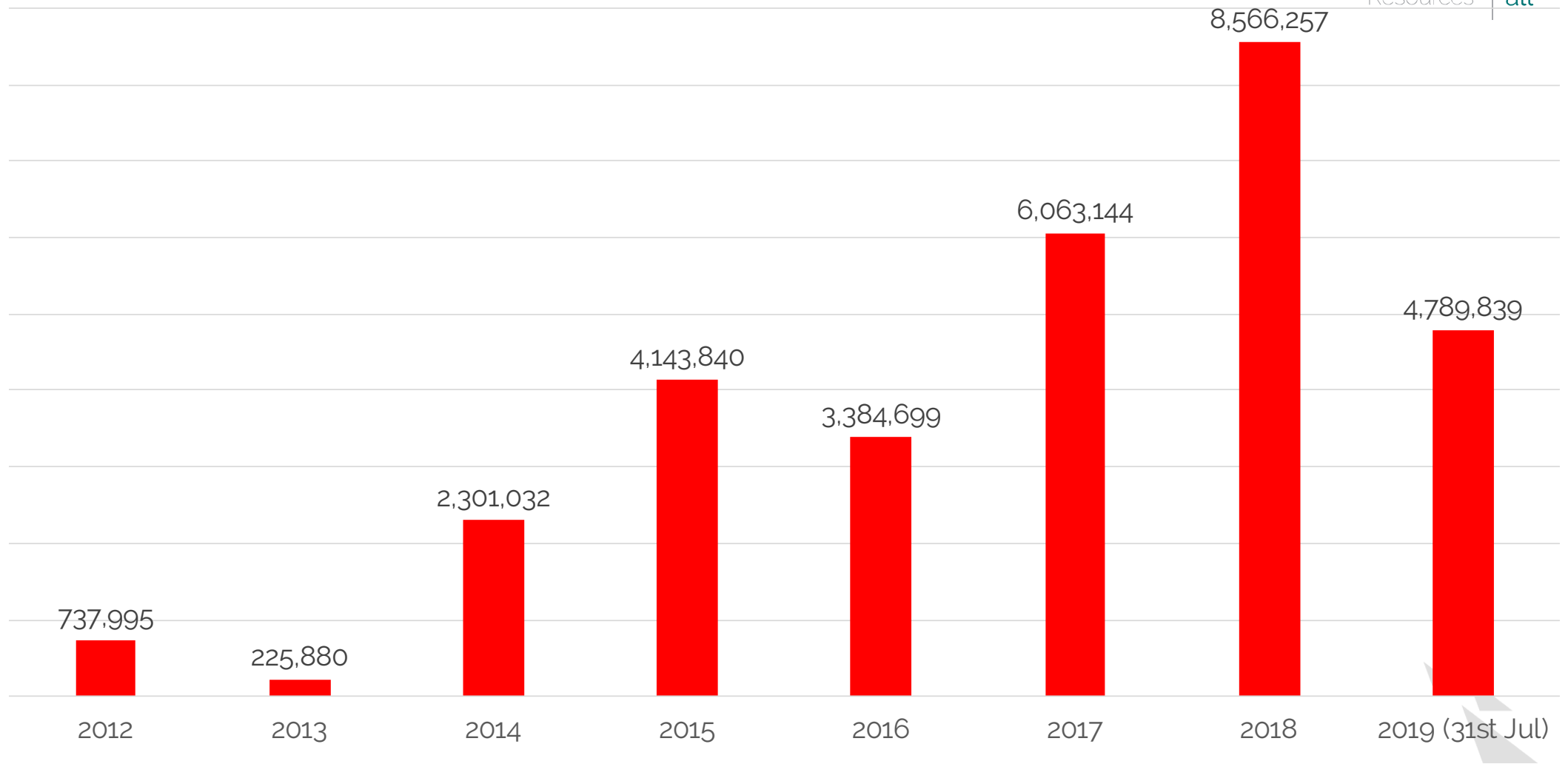
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US NAPP Coal - Imports Overview



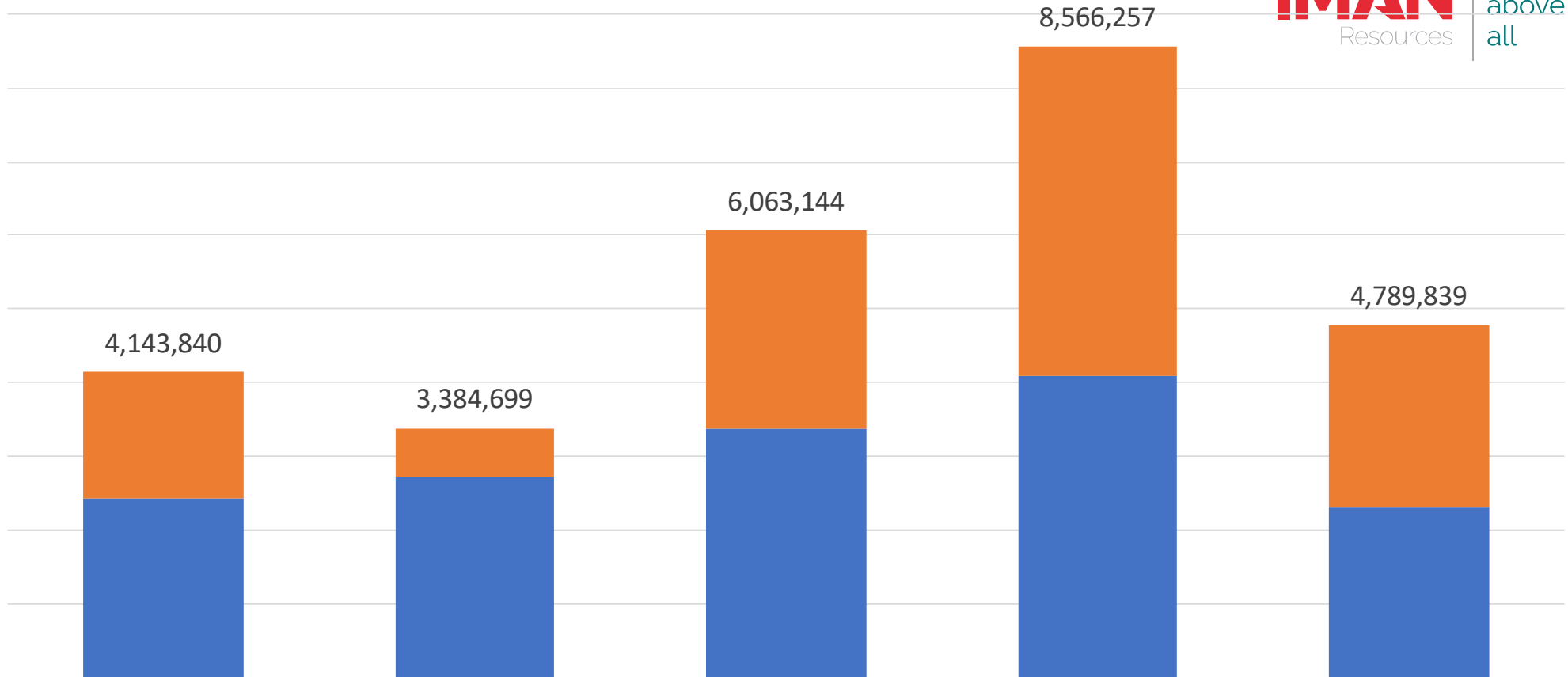
Total NAPP Coal Imports to India

(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 (31st Jul)
Industry	1,701,074	666,345	2,674,872	4,459,602	2,456,294
Retail	2,442,766	2,718,354	3,388,272	4,106,655	2,333,545
Total	4,143,840	3,384,699	6,063,144	8,566,257	4,789,839



Section - 5

Coking Coal - Imports Overview



India's Coking Coal Imports (MoM)



India's Coking Import (Metric Tons)

	Jul-19	Jul-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	3,733,240	3,657,619	2.07 %	20,856,142	23,410,413	(10.91)%
CANADA	576,843	608,210	(5.16)%	3,096,477	2,788,811	11.03 %
COLOMBIA	16,870			16,870	11,500	46.70 %
INDONESIA	73,518			757,377	334,334	126.53 %
MOZAMBIQUE	154,432	212,999	(27.50)%	1,195,973	881,721	35.64 %
NEW ZEALAND	47,712	60,706	(21.40)%	103,724	177,905	(41.70)%
RUSSIA		22,000	(100.00)%	219,120	265,720	(17.54)%
USA	249,271	276,037	(9.70)%	2,733,106	2,852,953	(4.20)%
TOTAL	4,851,886	4,837,571	0.30 %	28,978,788	30,723,358	(5.68)%



Section - 6

PCI - Imports Overview



India's PCI Imports (MoM)



India's PCI Import (Metric Tons)						
	Jul-19	Jul-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	698,075	462,691	50.87 %	5,444,929	3,532,387	54.14 %
CANADA	32,021			130,320	100,081	30.21 %
RUSSIA	335,135	262,404	27.72 %	2,246,230	1,278,032	75.76 %
TOTAL	1,065,231	725,095	46.91 %	7,821,480	4,910,500	59.28 %



India's PCI Imports (Brand Wise)



India's PCI Import (Metric Tons)						
	Jul-19	Jul-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	698,075	462,691	50.87 %	5,444,929	3,532,387	54.14 %
BHP 17% VM PCI COAL	37,741			57,228		
BHP 19% VM PCI COAL				91,111		
CAPRICORN PCI COAL				491,120	70,362	
CENTURY PCI COAL		108,548		102,904	339,714	
CURRAGH 10 PCT ASH PCI COAL		54,600		121,753	73,617	
EMERALD PCI COAL IN BULK					52,274	
JELLINBAH PCI COAL	292,376	159,799		1,388,169	1,041,773	
LAKE VERMONT PCI COAL	119,900	32,764		512,677	324,419	
LOW ASH PCI COAL (TSL PCI 8)	78,834			653,097	267,933	
MIDDLEMOUNT PCI COAL				203,798		
PCI COAL IN BULK	89,600			336,003	157,320	
PEAK DOWNS NORTH PCI COAL				70,448	114,136	
POITREL PCI COAL		78,980		852,454	760,431	
SOUTH WALKER PCI COAL	79,624			388,960	201,430	
WERRIS CREEK LOW ASH PCI				157,272	78,960	
YARRABEE PCI COAL		28,000		17,935	50,018	

India's PCI Imports (Brand Wise)



India's PCI Import (Metric Tons)						
	Jul-19	Jul-18	% Change	YTD 2019	YTD 2018	% Change
CANADA	32,021			130,320	100,081	30.21 %
TECK CRO SOFT PCI COAL	32,021			130,320	20,581	
BRULE LV PCI COAL					79,500	
RUSSIA	335,135	262,404	27.72 %	2,246,230	1,278,032	75.76 %
KRASNY BROD PCI COAL	84,704			653,865	230,786	
PCI COAL IN BULK	142,951	116,364		1,484,885	829,184	
BEREZOVSKY PCI COAL		75,200			101,932	
MV PCI COAL (12 to 18 % VM)	96,080	36,300		96,080	81,590	
HV PCI COAL (Above 25% VM)	11,400	34,540		11,400	34,540	





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