



IMAN Report

India's Import – Coal & Coke



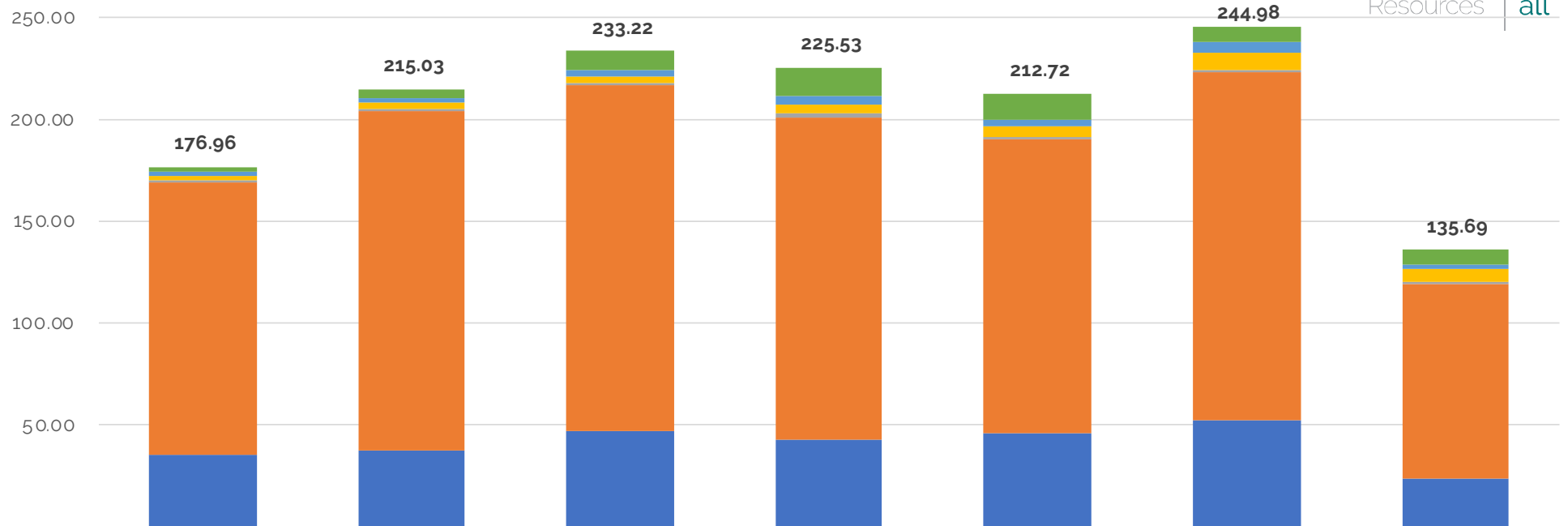


Section - 1

India – Total Imports Overview



India's Imports – Coal & Coke (MMT)



	CY 2013	CY 2014	CY 2015	CY 2016	CY 2017	CY 2018	CY 2019 (up to June)
PET COKE	2.78	4.36	9.19	14.59	12.42	6.82	6.87
MET COKE	2.39	2.75	3.09	3.69	3.45	5.46	1.94
PCI COAL	1.89	2.37	3.24	4.79	5.18	8.05	6.73
ANTHRACITE	0.75	1.41	1.18	1.18	1.28	1.67	1.10
THERMAL COAL	133.54	166.59	169.58	158.57	144.45	170.97	95.15
CO KING COAL	35.62	37.55	46.93	42.72	45.93	52.01	23.90
Total Coal & COKE	176.96	215.03	233.22	225.53	212.72	244.98	135.69

- India's Import of fuel has started rising again after fall in 2 consecutive calendar years.

India's Imports – Coal & Coke (MoM)



India's Coal & Coke Import (Million Metric Tons)						
	Jun-19	Jun-18	% Change	YTD 2019	YTD 2018	% Change
COKING COAL	4.797	4.224	13.56 %	23.899	26.355	(9.32)%
THERMAL COAL	13.995	14.842	(5.71)%	95.154	81.435	16.85 %
ANTHRACITE	0.190	0.144	32.03 %	1.096	0.809	35.43 %
PCI COAL	1.183	0.788	50.13 %	6.730	3.924	71.50 %
MET COKE	0.255	0.418	(38.97)%	1.937	2.695	(28.11)%
PET COKE	1.018	0.763	33.34 %	6.870	4.074	68.65 %
TOTAL	21.438	21.180	1.22 %	135.686	119.291	13.74 %



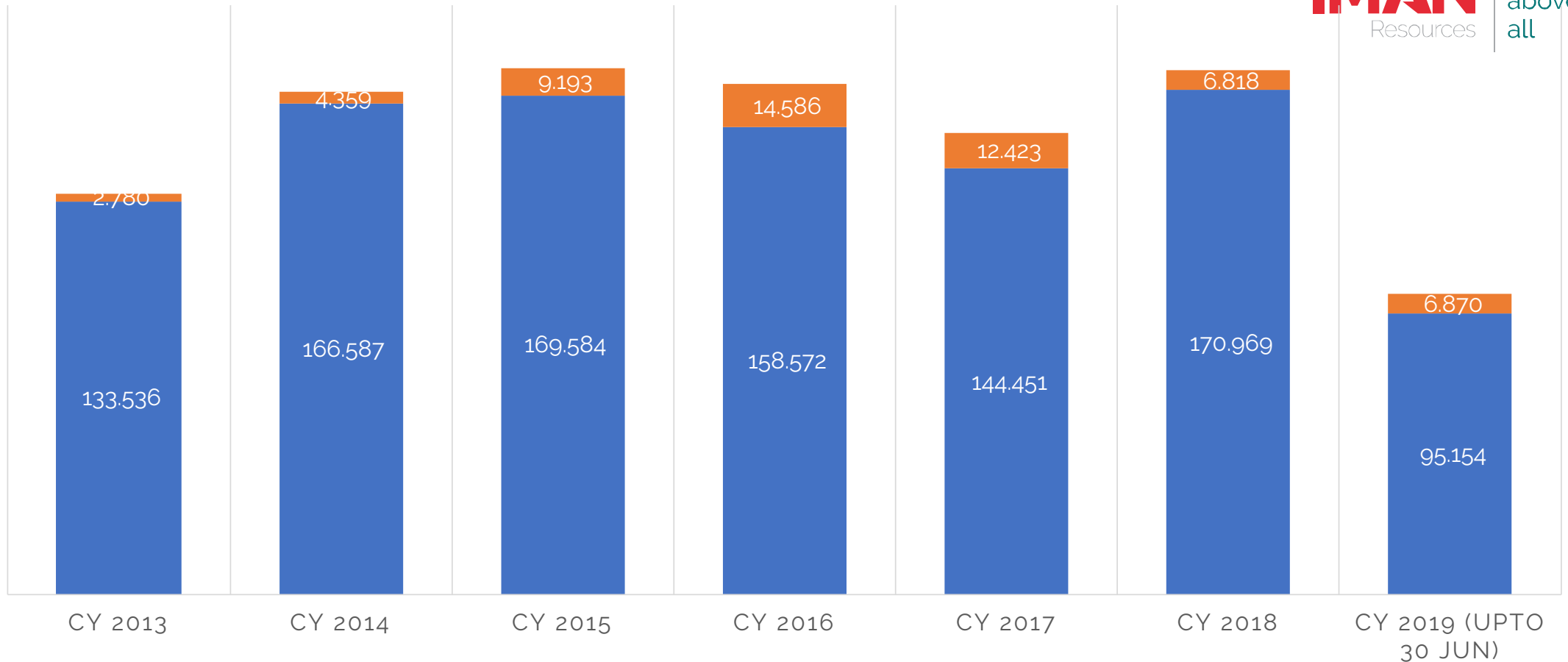


Section - 2

Solid Fuels - Imports Overview



India's Solid Fuel Imports (MMT)



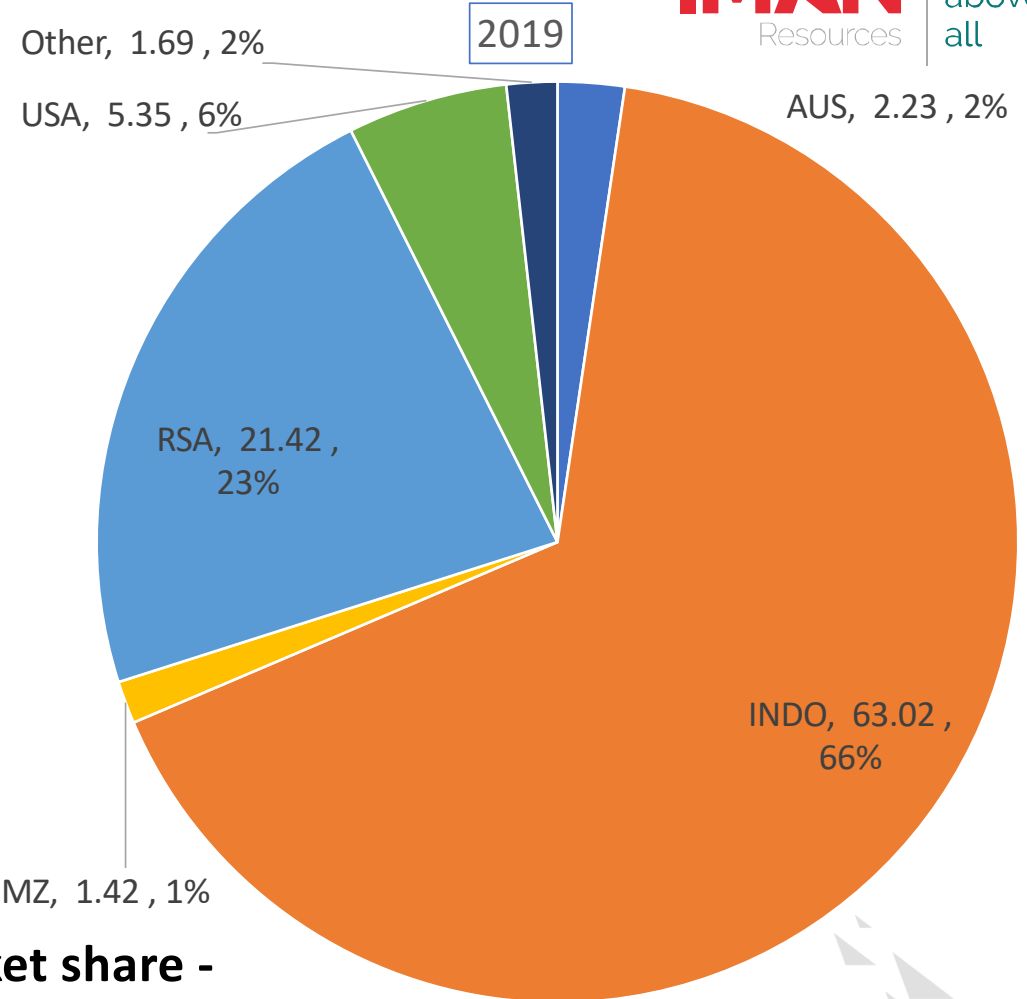
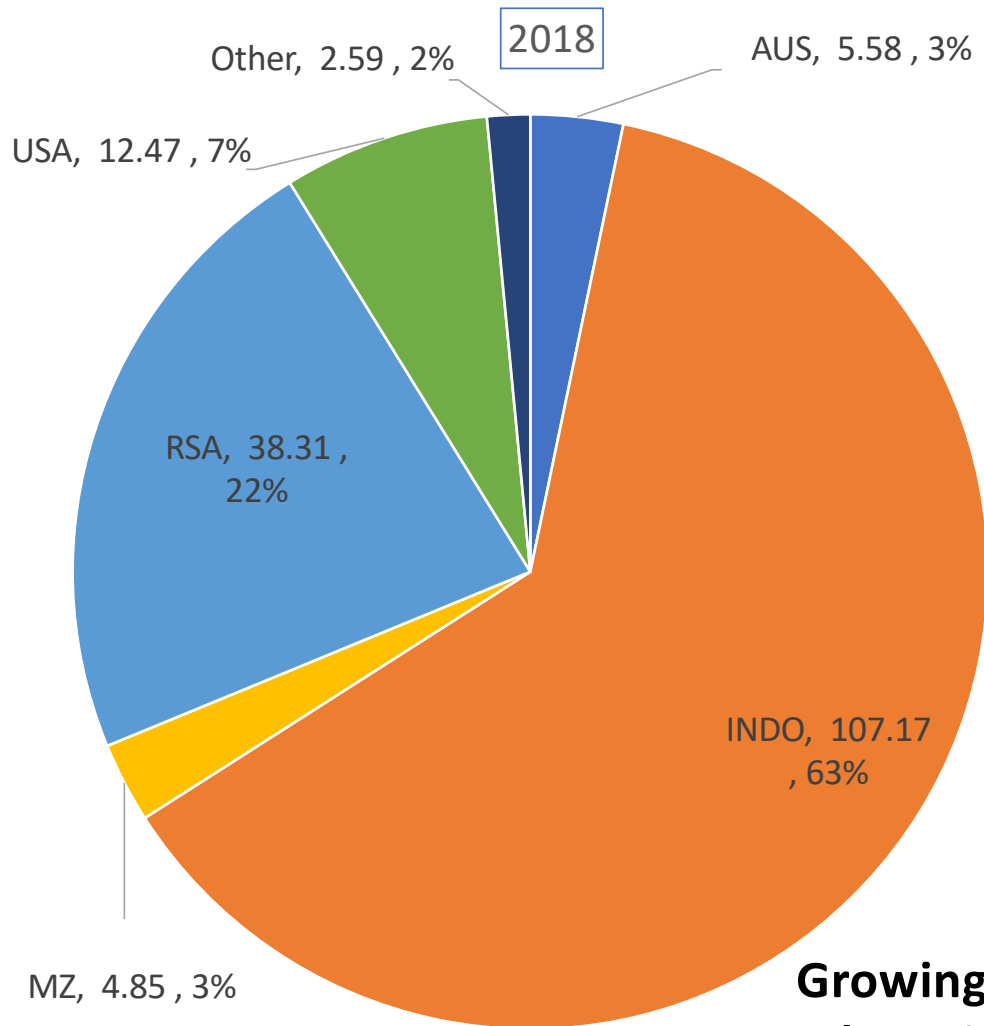
- India's Import of solid fuel has started rising again after fall in 2 consecutive calendar years.
- In 2019, for the first six months, fuel imports scaled all time high and may reach an annualized total of 190 MMT.

India's Thermal Coal Imports (MoM)

India's Thermal Import (Metric Tons)						
	Jun-19	Jun-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	501,130	5,21,575	(3.92)%	2,237,522	1,916,030	16.78 %
COLOMBIA		3,32,175	(100.00)%		497,035	(100.00)%
INDONESIA	7,596,289	90,91,496	(16.45)%	63,023,835	49,634,553	26.98 %
MOZAMBIQUE	164,270	3,35,441	(51.03)%	1,428,833	2,147,534	(33.47)%
PHILIPPINES				54,550	55,000	(0.82)%
RUSSIA	392,757	42,850	816.58 %	1,637,066	1,174,292	39.41 %
SOUTH AFRICA	4,175,465	32,23,234	29.54 %	21,427,434	18,935,216	13.16 %
USA	1,165,409	12,95,713	(10.06)%	5,344,301	7,075,147	(24.46)%
TOTAL	13,995,320	1,48,42,484	(5.71)%	95,153,541	81,434,807	16.85 %

India's Coal Imports (MMT)

Data Format
Origin, Quantity, Share



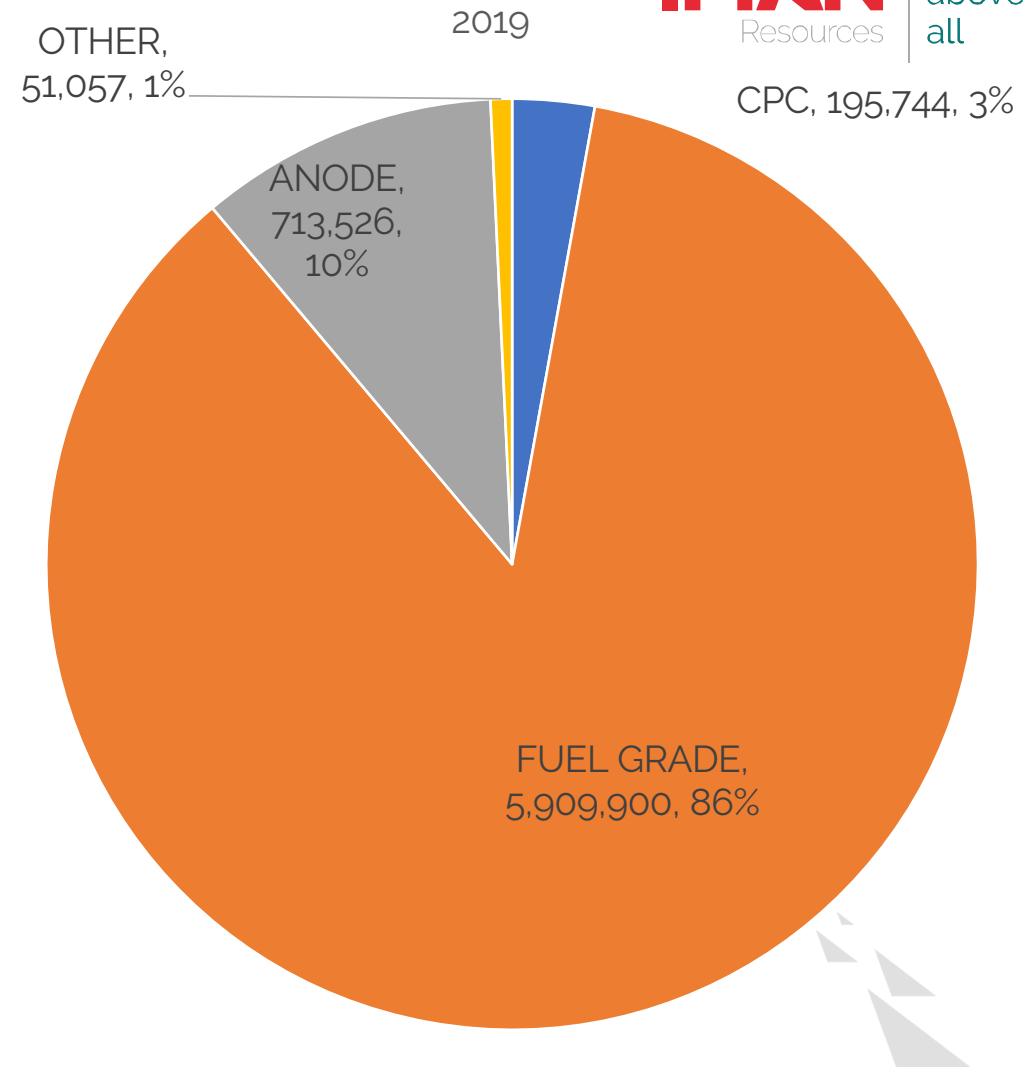
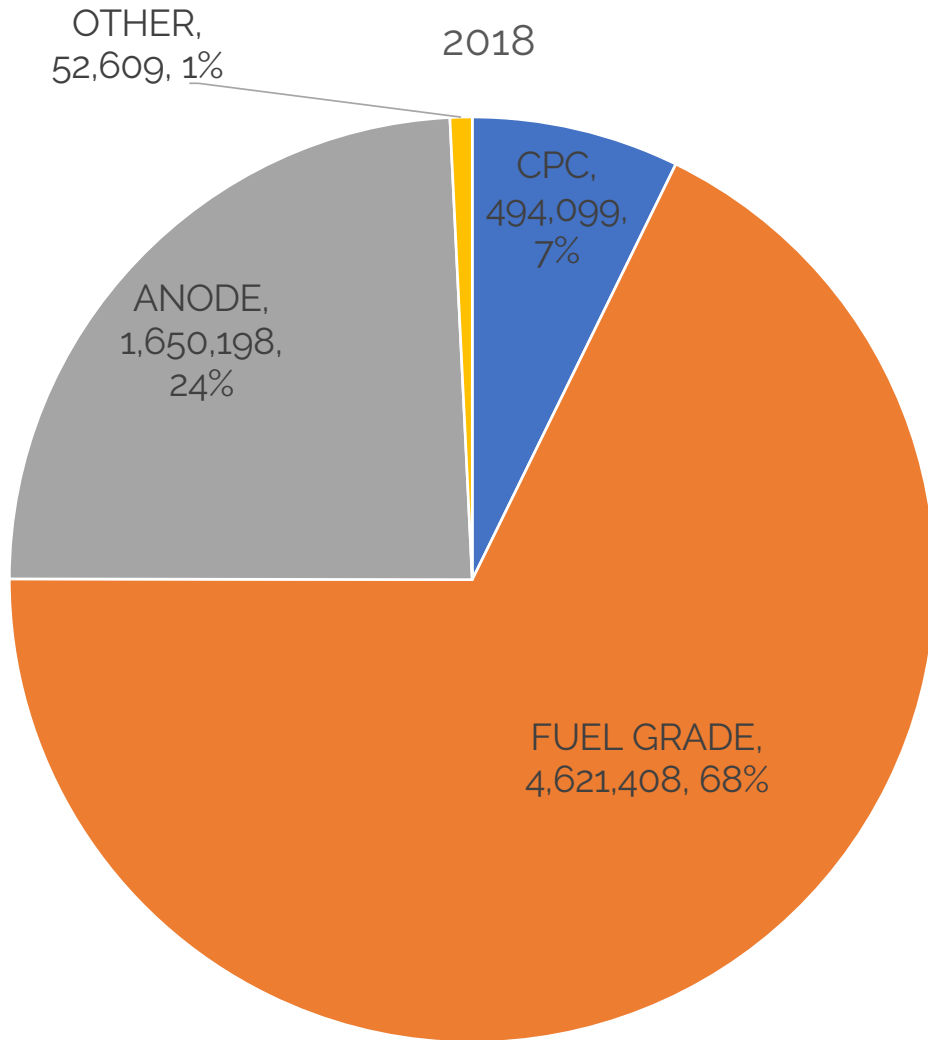
**Growing market share -
Indonesia & South Africa**

India's Pet Coke Imports (MoM)

India's Pet Coke Import (Metric Tons)

	Jun-19	Jun-18	% Change	YTD 2019	YTD 2018	% Change
USA	398,545	363,016	9.79 %	3,571,354	1,934,751	84.59 %
SAUDI ARABIA	433,026	281,155	54.02 %	2,139,825	1,287,756	66.17 %
CHINA	49,945	96,467	(48.23)%	450,283	459,021	(1.90)%
KUWAIT				78,351	150,131	(47.81)%
INDONESIA		21,444	(100.00)%	56,675	101,571	(44.20)%
OMAN	47,790			193,490		
CANADA				149,439		
Other	88,303	1,090	8,002.81 %	230,811	140,384	64.41 %
TOTAL	1,017,609	763,172	33.34 %	6,870,228	4,073,613	68.65 %

India's Pet Coke Imports (Grade Wise)





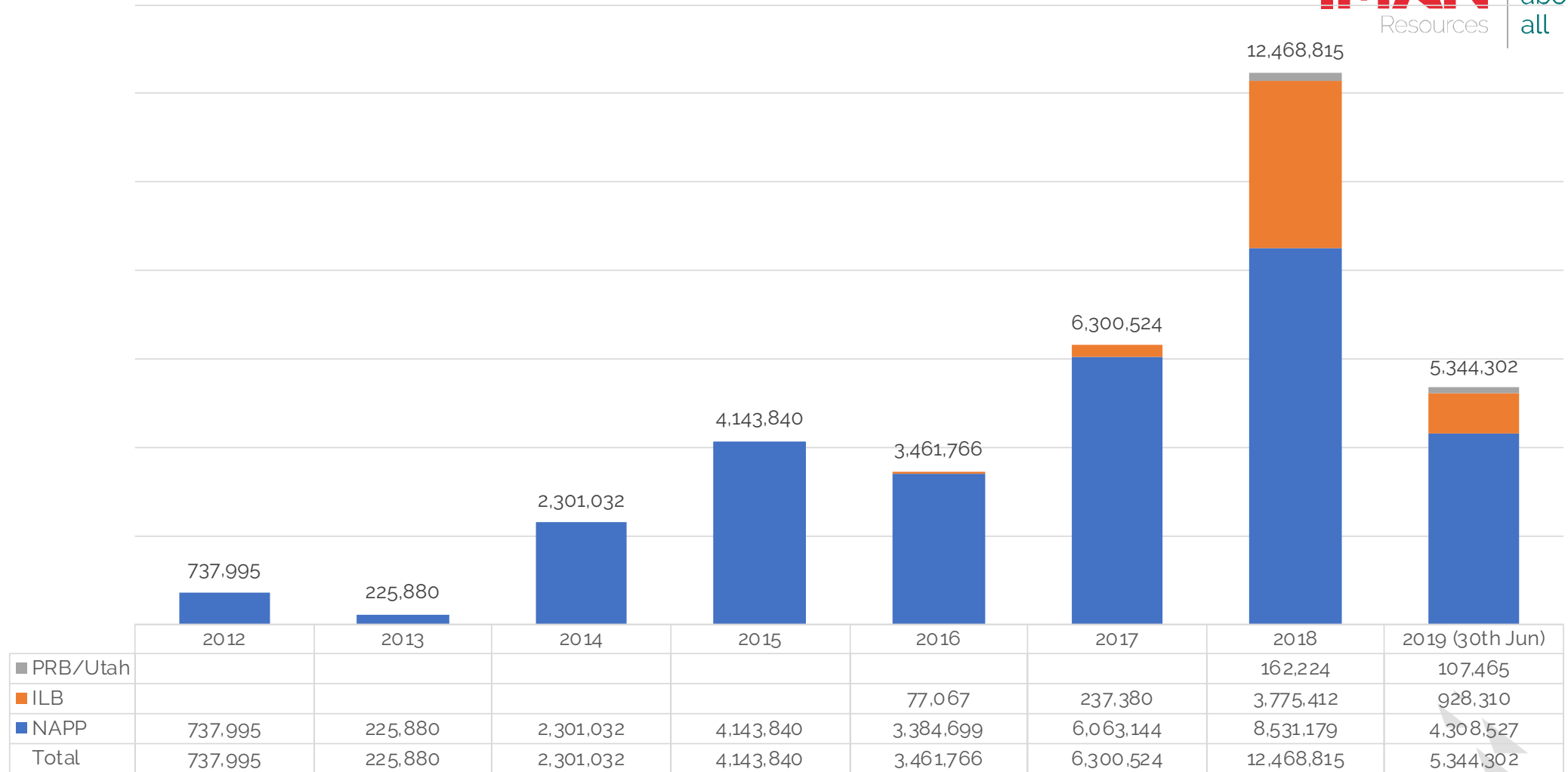
Section - 3

US Thermal Coal - Imports Overview



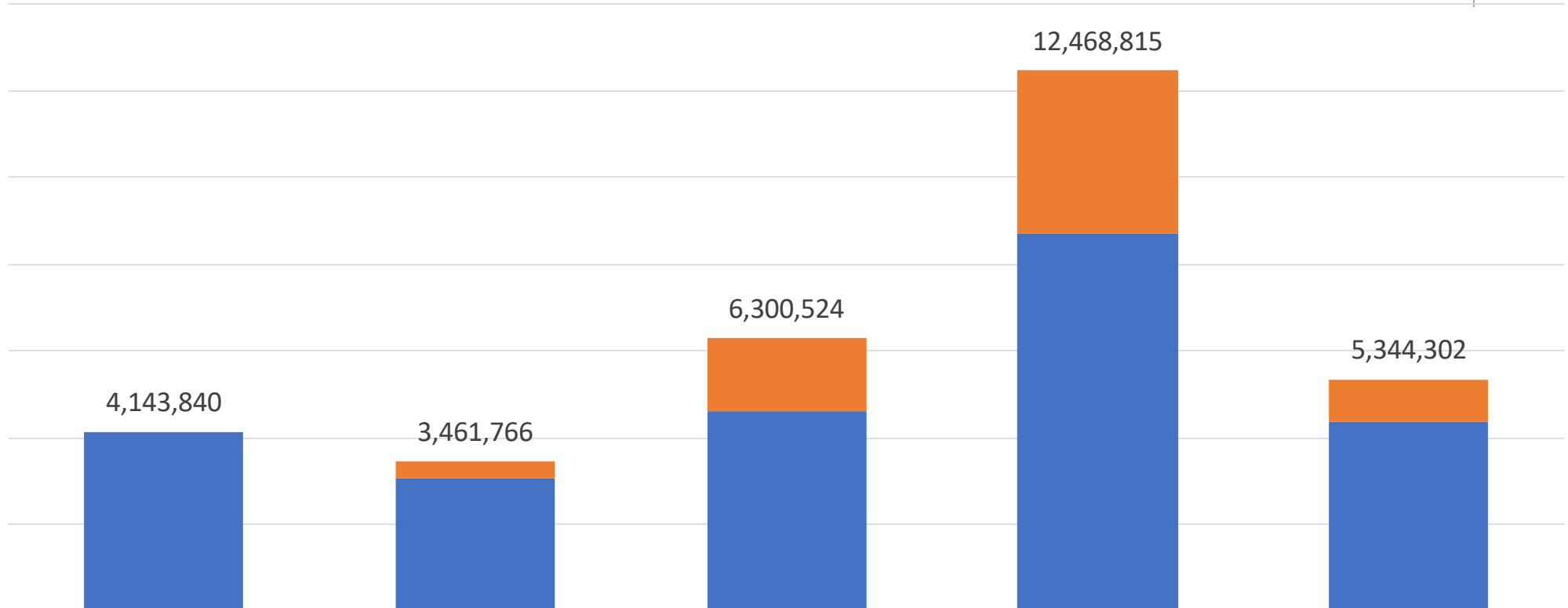
US Thermal Coal Imports – Quality Wise

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



US Thermal Coal Imports – ECI/WCI Wise

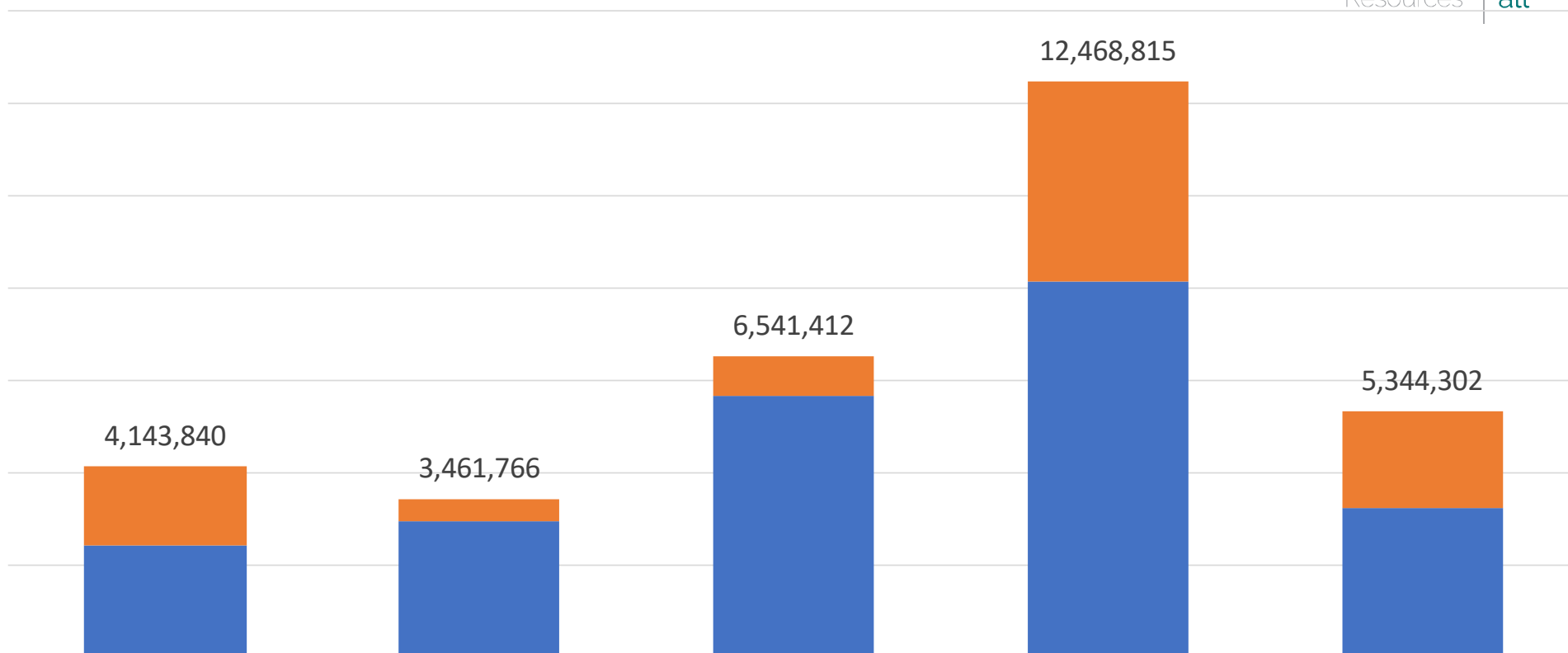
(Data based on Arrival of Vessels at Discharge port / in MT)



	2015	2016	2017	2018	2019 (30th Jun)
ECI	-	390,326	1,707,703	3,775,412	982,200
WCI	4,143,840	3,071,440	4,592,821	8,693,403	4,362,102
Total	4,143,840	3,461,766	6,300,524	12,468,815	5,344,302

US Thermal Coal Imports – Segment Wise

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



	2015	2016	2017	2018	2019 (30th Jun)
End Users	1,696,725	516,014	871,747	4,297,302	2,073,192
Traders	2,447,115	2,945,752	5,669,665	8,171,513	3,271,110
Total	4,143,840	3,461,766	6,541,412	12,468,815	5,344,302

US Thermal Coal Imports (by Consumer)



	2018	2019 (Upto 30 Jun)
Cement	4,185,084	2,076,875
SHREE CEMENT LIMITED	1,387,895	434,262
ULTRATECH CEMENT LIMITED	939,531	939,318
THE INDIA CEMENTS LIMITED	734,173	367,089
OTHER	1,123,485	336,206
Power	843,187	
VEDANTA LIMITED	407,694	
NAYARA ENERGY	162,224	
TATA POWER	151,634	
JINDAL STEEL & POWER LIMITED	121,635	
Traders	7,440,543	3,267,426



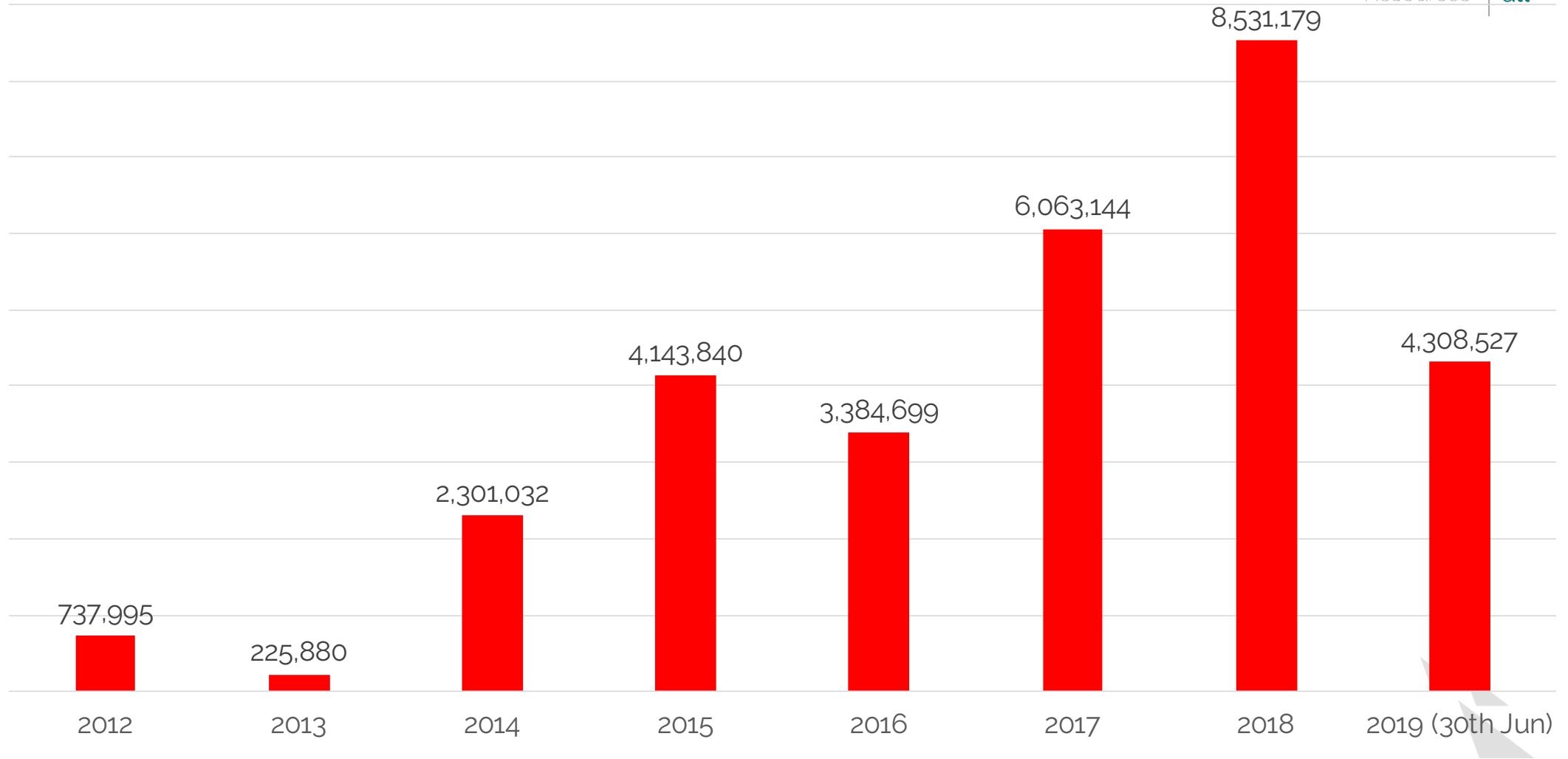
Section - 4

US NAPP Coal - Imports Overview



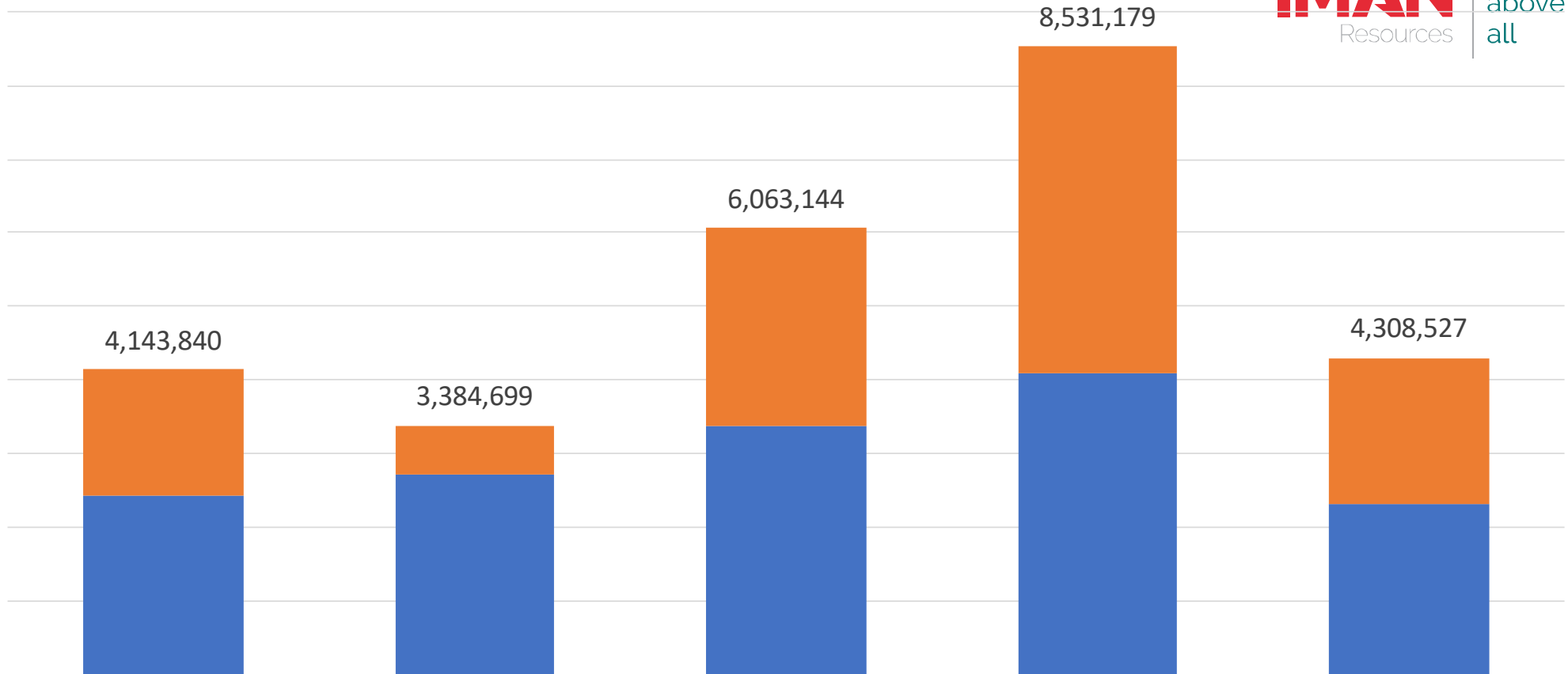
Total NAPP Coal Imports to India

(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 (30th Jun)
Industry	1,701,074	666,345	2,674,872	4,424,524	1,976,982
Retail	2,442,766	2,718,354	3,388,272	4,106,655	2,331,545
Total	4,143,840	3,384,699	6,063,144	8,531,179	4,308,527



Section - 5

Coking Coal - Imports Overview



India's Coking Coal Imports (MoM)

India's Coking Import (Metric Tons)

	Jun-19	Jun-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	3,250,763	3,026,657	7.40 %	16,860,609	19,996,080	(15.68)%
CANADA	462,539	567,380	(18.48)%	2,545,005	2,180,601	16.71 %
COLOMBIA					11,500	(100.00)%
INDONESIA	55,000			683,859	334,334	104.54 %
MOZAMBIQUE	290,100	212,213	36.70 %	1,088,771	838,742	29.81 %
NEW ZEALAND	35,500			91,512	117,199	(21.92)%
RUSSIA	99,000	82,090	20.60 %	219,120	299,206	(26.77)%
USA	627,837	336,138	86.78 %	2,484,043	2,576,916	(3.60)%
TOTAL	4,820,739	4,224,478	14.11 %	23,972,920	26,354,579	(9.04)%