



IMAN Report

India's Import – Coal & Coke

Nov 2019



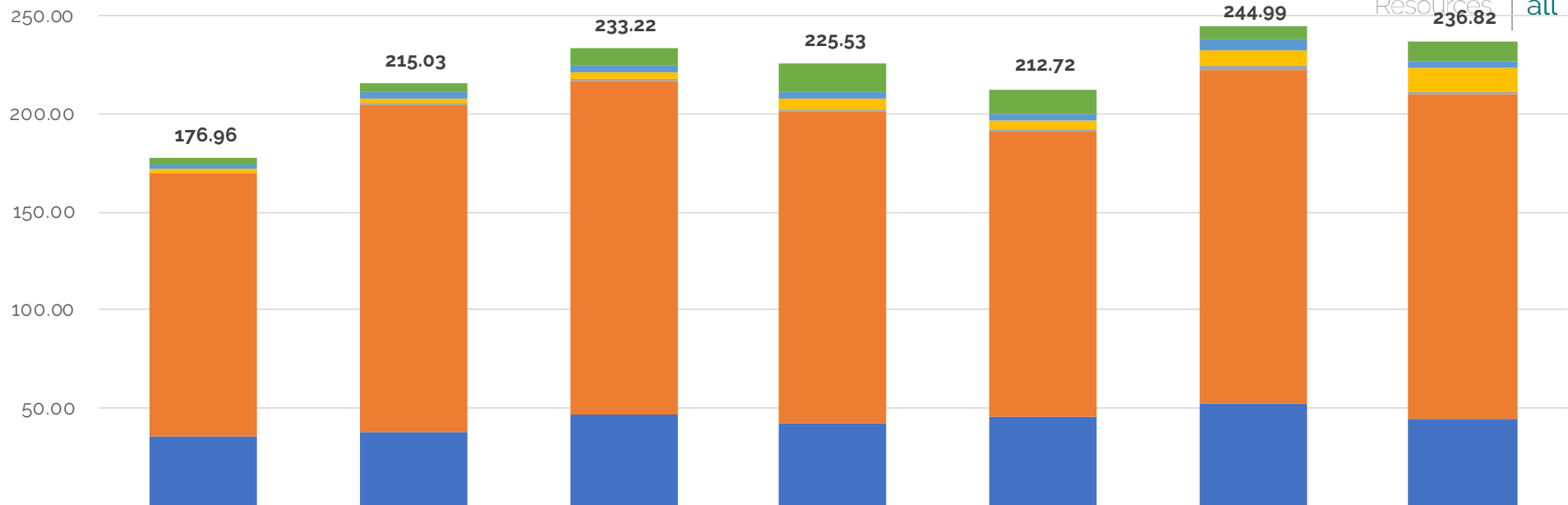


Section - 1

India – Total Imports Overview



India's Imports – Coal & Coke (MMT)



	CY 2013	CY 2014	CY 2015	CY 2016	CY 2017	CY 2018	CY 2019 (upto 30th Nov)
PET COKE	2.78	4.36	9.19	14.59	12.42	6.83	10.66
MET COKE	2.39	2.75	3.09	3.69	3.45	5.46	3.08
PCI COAL	1.89	2.37	3.24	4.79	5.18	8.48	11.58
ANTHRACITE	0.75	1.41	1.18	1.18	1.28	1.67	1.86
THERMAL COAL	133.54	166.59	169.58	158.57	144.45	170.53	165.55
COKING COAL	35.62	37.55	46.93	42.72	45.93	52.03	44.09
Total Coal & COKE	176.96	215.03	233.22	225.53	212.72	244.99	236.82

- India's import of fuels continues to grow after 2 years continuous fall in CY 2016 and CY2017

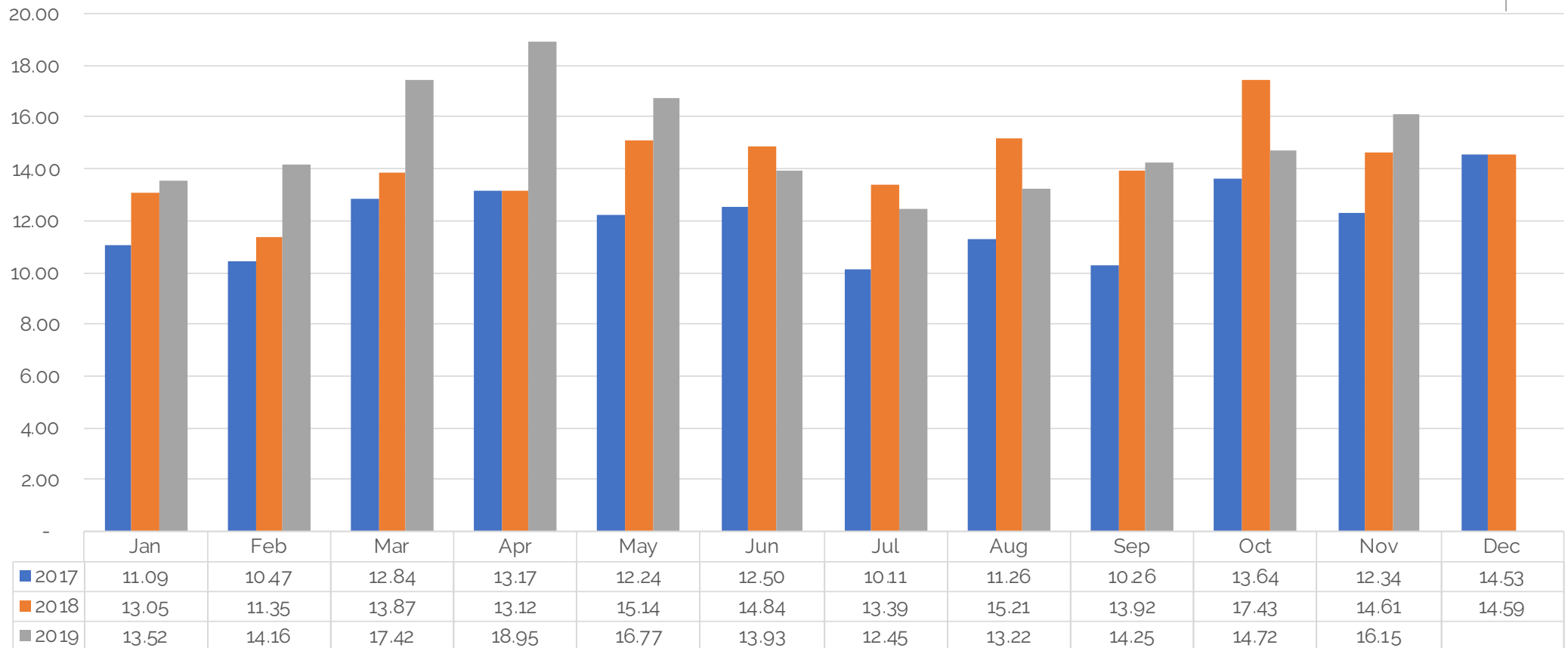
India's Imports – Coal & Coke (MoM)



India's Coal & Coke Import (Million Metric Tons)						
	Nov-19	Nov-18	% Change	YTD 2019	YTD 2018	% Change
COKING COAL	3.61	4.22	(14.52)%	44.09	46.46	(5.11)%
THERMAL COAL	16.15	14.63	10.34 %	165.55	156.23	5.96 %
ANTHRACITE	0.06	0.17	(62.85)%	1.86	1.55	20.61 %
PCI COAL	1.00	0.45	119.93 %	11.58	7.76	49.26 %
MET COKE	0.22	0.39	(43.19)%	3.08	5.09	(39.55)%
PET COKE	0.94	0.49	90.25 %	10.66	6.14	73.70 %
TOTAL	21.98	20.36	7.93 %	236.82	223.22	6.09 %

- ❖ 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)

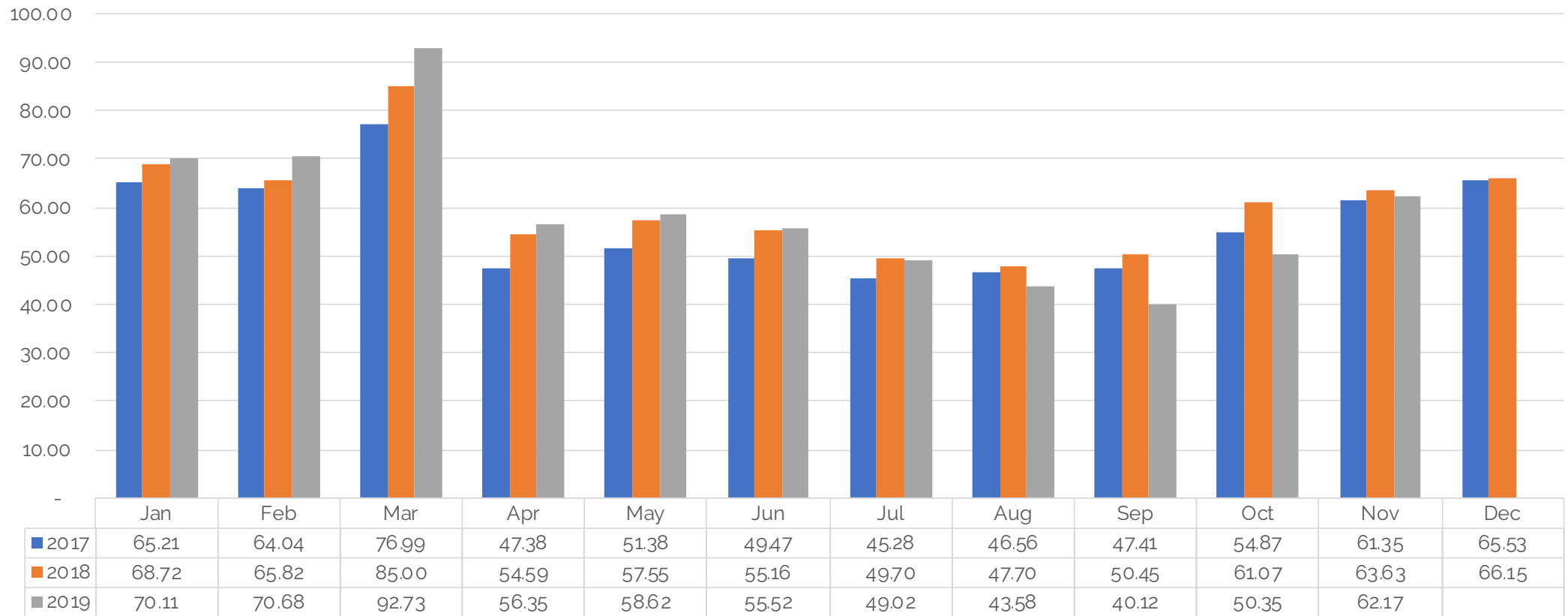


- ❖ In 1H CY 2019 thermal coal imports grew strongly but momentum lost pace from June
- ❖ November imports show a modest revival in import growth.



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.

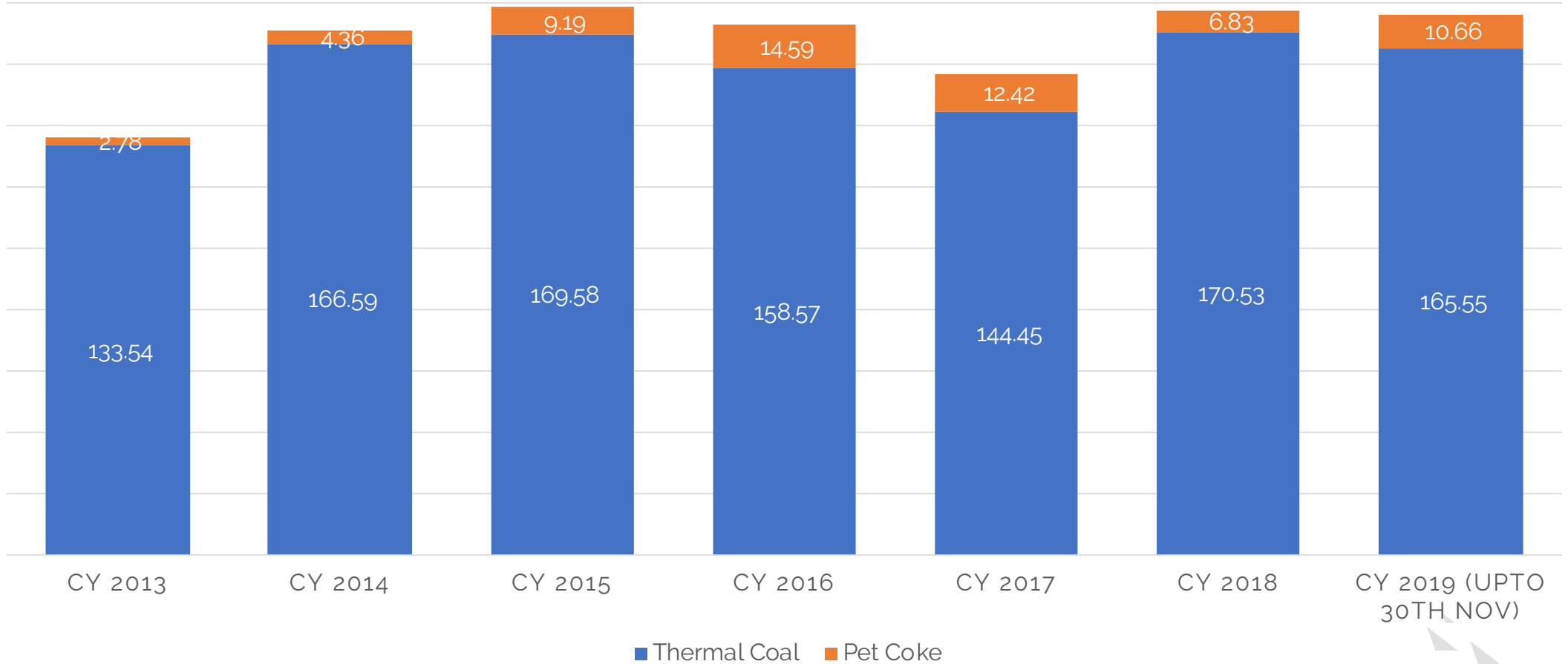


Section - 2

Solid Fuels - Imports Overview



India's Solid Fuel Imports (MMT)



India's Thermal Coal Imports (MoM)

India's Thermal Import (Metric Tons)						
	Nov-19	Nov-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	385,000	538,527	(28.51)%	3,323,055	5,055,188	(34.26)%
COLOMBIA				672,212	497,035	35.24 %
INDONESIA	11,067,040	10,221,811	8.27 %	110,445,544	97,479,239	13.30 %
MOZAMBIQUE	321,630	345,598	(6.94)%	2,650,455	4,449,049	(40.43)%
PHILIPPINES				54,550	55,000	(0.82)%
RUSSIA	143,120			2,511,703	1,754,822	43.13 %
SOUTH AFRICA	3,478,989	2,568,281	35.46 %	37,838,621	34,908,778	8.39 %
USA	752,233	960,554	(21.69)%	8,052,902	12,031,277	(33.07)%
TOTAL	16,148,012	14,634,771	10.34 %	165,549,042	156,230,389	5.96 %

- ❖ 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.

India's Thermal Coal Imports (Nov 2019)

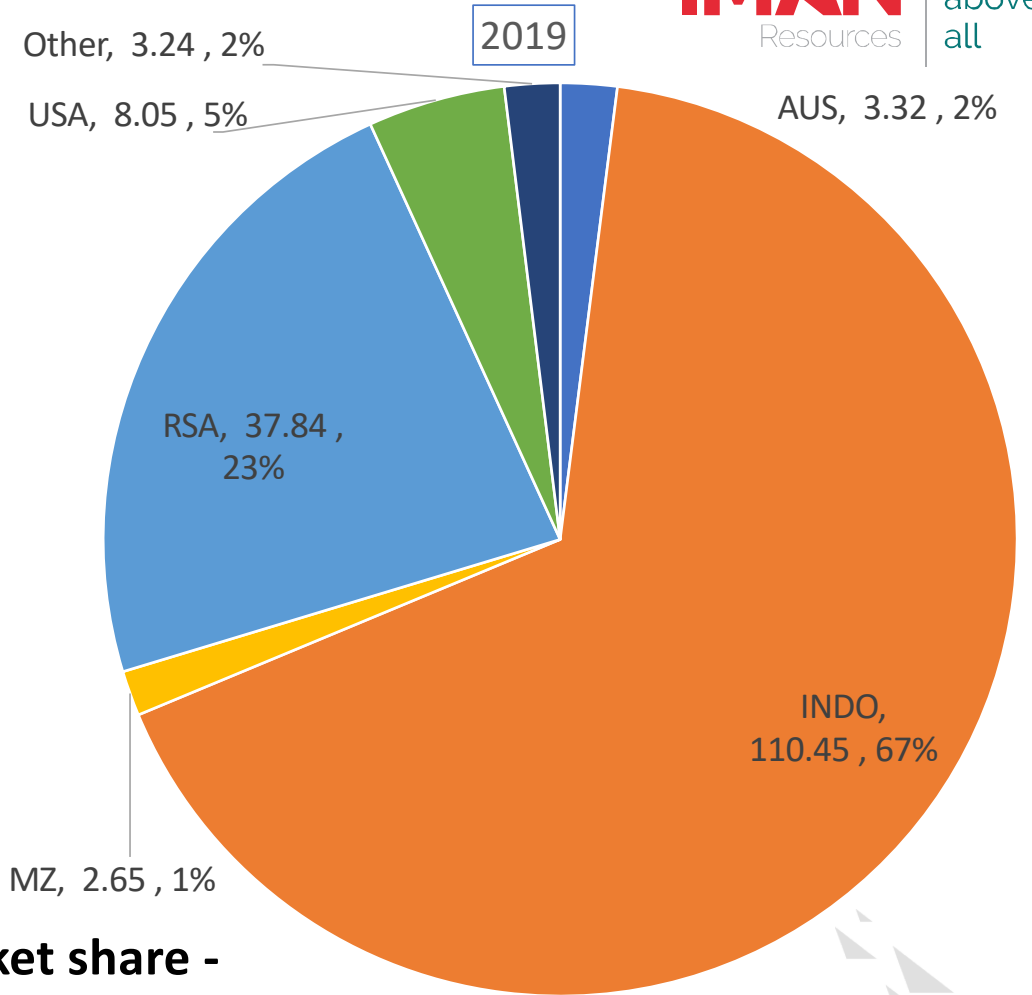
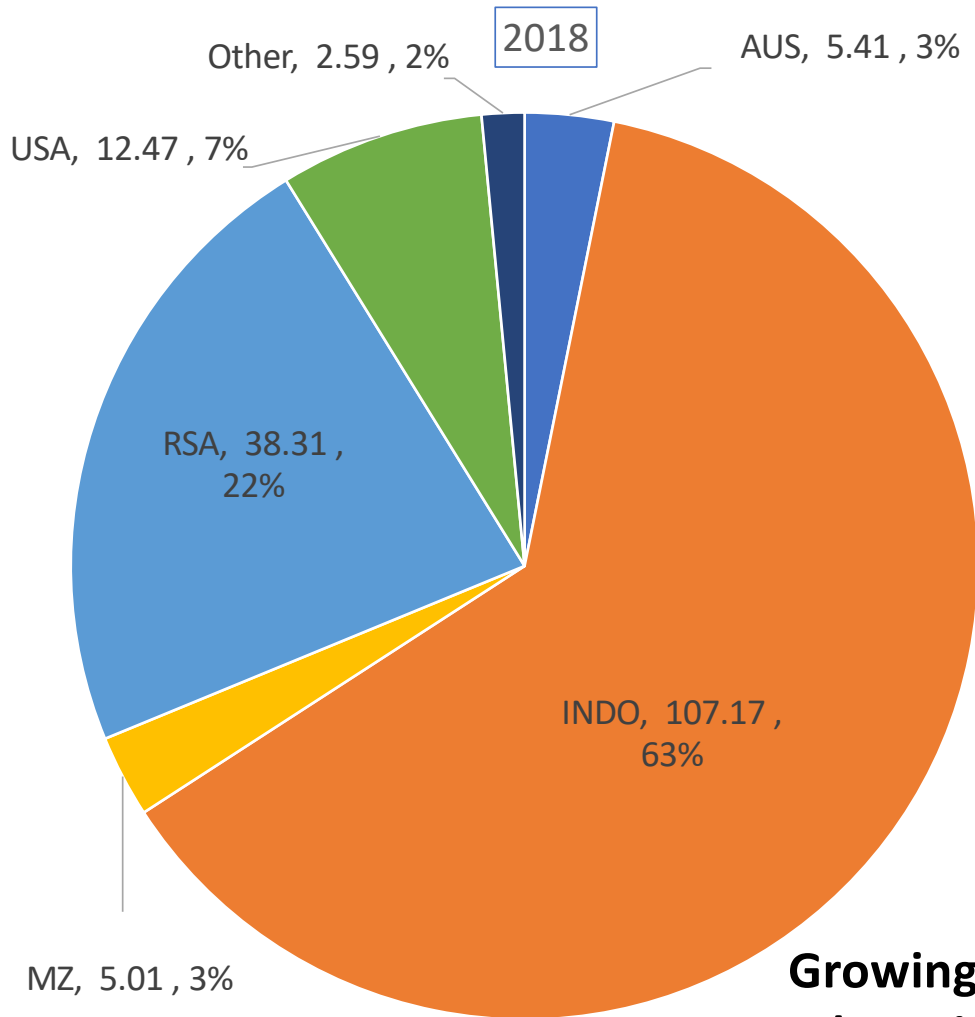
Importing Port with Coal Origin



Port	AUSTRALIA	INDONESIA	MOZAMBIQUE	RUSSIA	SOUTH AFRICA	USA	Grand Total
DAHANU		52,360					52,360
DAHEJ	152,500	382,337			141,826		676,663
DHAMRA		131,554			328,405		459,959
DHARAMTAR		367,662					367,662
ENNORE		573,719					573,719
GANGAVARAM	82,500	81,331	38,550		831,739		1,034,120
GOPALPUR					45,636		45,636
HALDIA / KOLKATA	55,000	161,838			235,651		452,489
HAZIRA / MAGDALLA / SURAT		968,004		59,820	103,626		1,131,450
JAIGARH		42,600	165,000		158,624		366,224
JAKHAU			63,080				63,080
KAKINADA		234,034			51,250		285,284
KANDLA / Tuna		463,680			329,760	668,025	1,461,465
KARAIKAL		429,821					429,821
KRISHNAPATNAM		709,470			476,791		1,186,261
MANGALORE		123,150			60,741		183,891
MORMUGAO		36,000		83,300	108,987		228,287
MUMBAI		63,401					63,401
MUNDRA	95,000	3,202,714			161,902		3,459,616
NAVLAKHI		715,230					715,230
OKHA		56,120					56,120
PARADIP		240,474			141,467		381,941
PIPAVAV		60,500	55,000				115,500
REVDANDA		87,850					87,850
SALAYA		486,237			150,000		636,237
TUTICORIN		749,702					749,702
VIZAG		647,252			152,584	84,208	884,044
Grand Total	385,000	11,067,040	321,630	143,120	3,478,989	752,233	16,148,012

India's Coal Imports (MMT)

Data Format
Origin, Quantity, Share

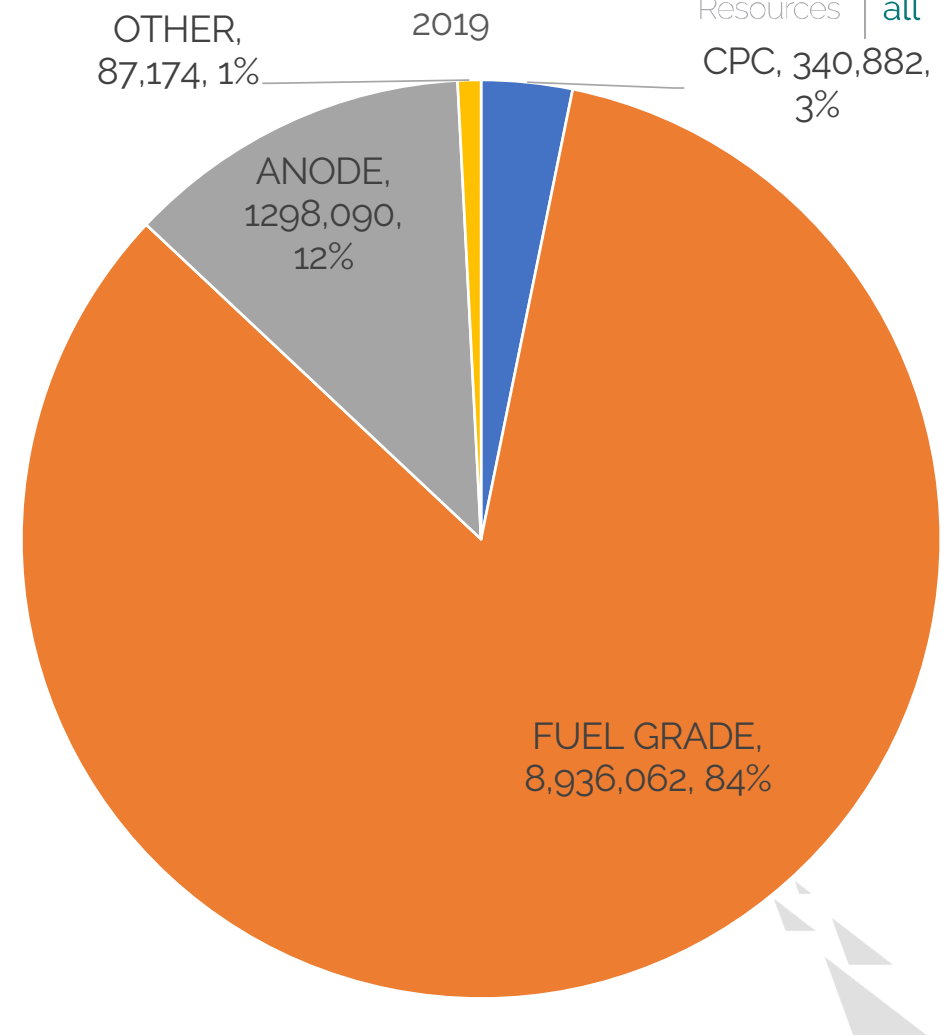
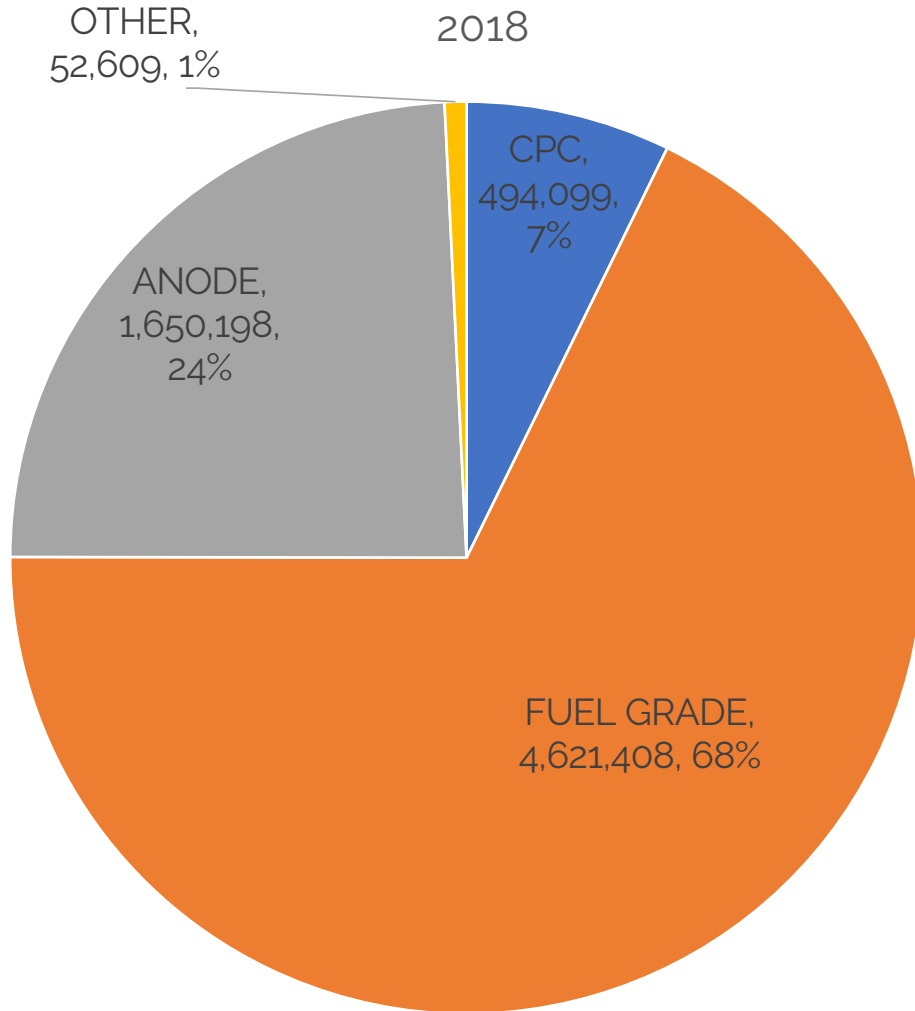


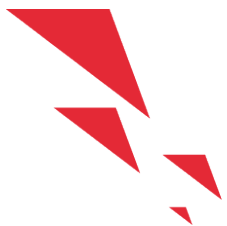
**Growing market share -
Indonesia & South Africa**

India's Pet Coke Imports (MoM)

India's Pet Coke Import (Metric Tons)						
	Nov-19	Nov-18	% Change	YTD 2019	YTD 2018	% Change
USA	598,526	102,778	482.35 %	5,452,503	2,782,830	95.93 %
SAUDI ARABIA	160,973	188,951	(14.81)%	3,349,308	1,945,204	72.18 %
CHINA	39,697	89,039	(55.42)%	661,360	645,424	2.47 %
OMAN	9,500	27,500	(65.45)%	302,402	55,000	449.82 %
CANADA				149,439		
KUWAIT	32,998			141,599	181,221	(21.86)%
INDONESIA		43,060		115,167	208,396	(44.74)%
Other	94,986	41,005	131.64 %	490,431	319,993	53.26 %
TOTAL	936,680	492,333	90.25 %	10,662,209	6,138,068	73.71 %

India's Pet Coke Imports (Grade Wise)





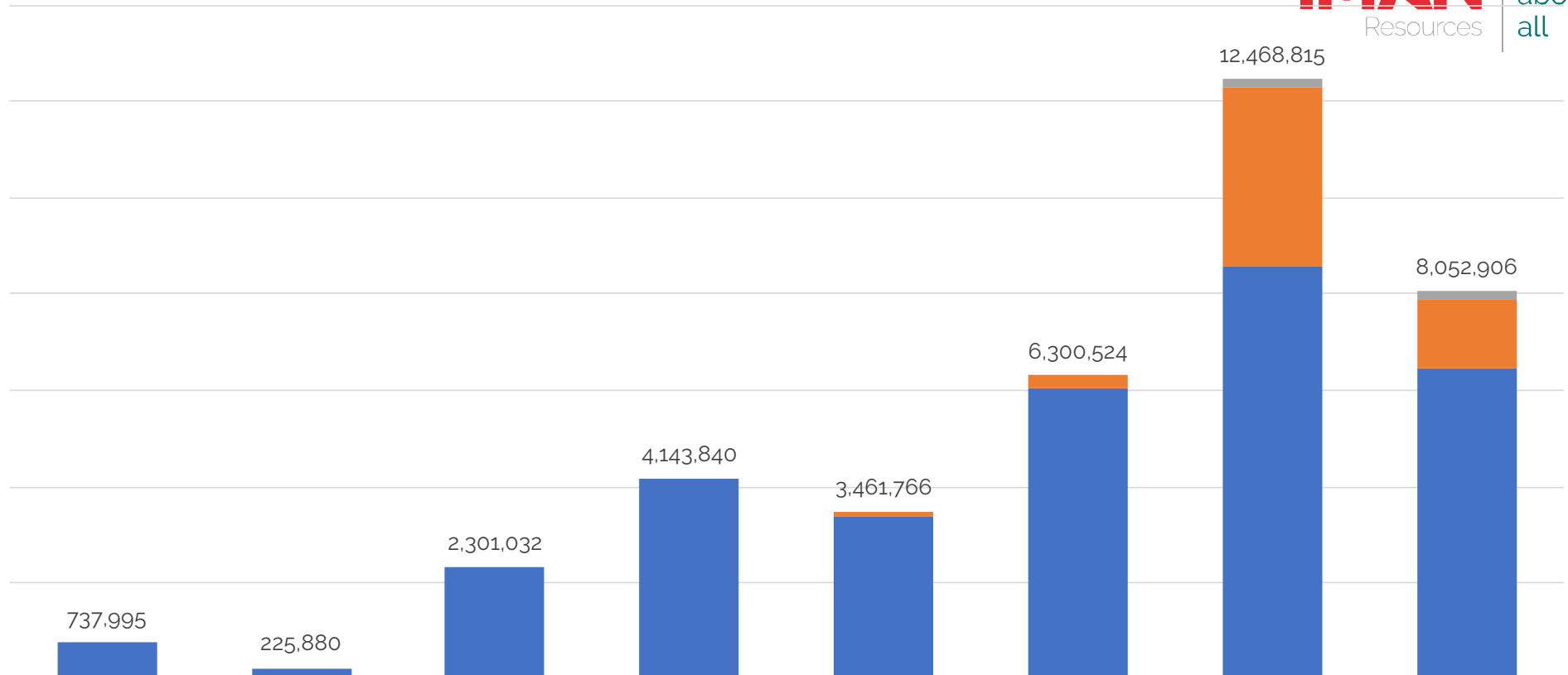
Section - 3

US Thermal Coal - Imports Overview



US Thermal Coal Imports – Quality Wise

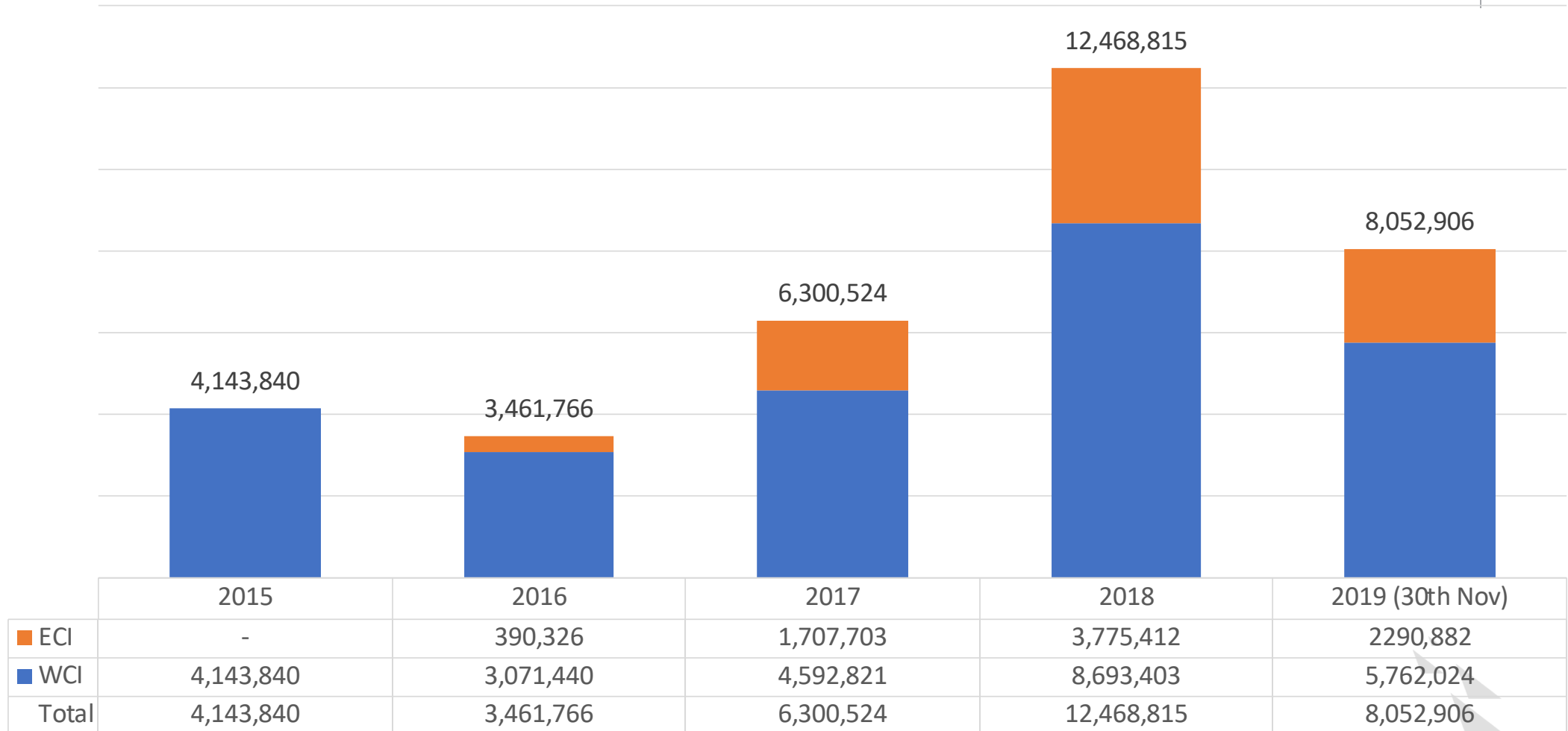
(Data based on Arrival of Vessels at Discharge port / in MT)



	2012	2013	2014	2015	2016	2017	2018	2019 (30th Nov)
■ PRB/Utah							162,224	160,405
■ ILB					77,067	237,380	3,740,334	1434,255
■ NAPP	737,995	225,880	2,301,032	4,143,840	3,384,699	6,063,144	8,566,257	6,458,246
Total	737,995	225,880	2,301,032	4,143,840	3,461,766	6,300,524	12,468,815	8,052,906

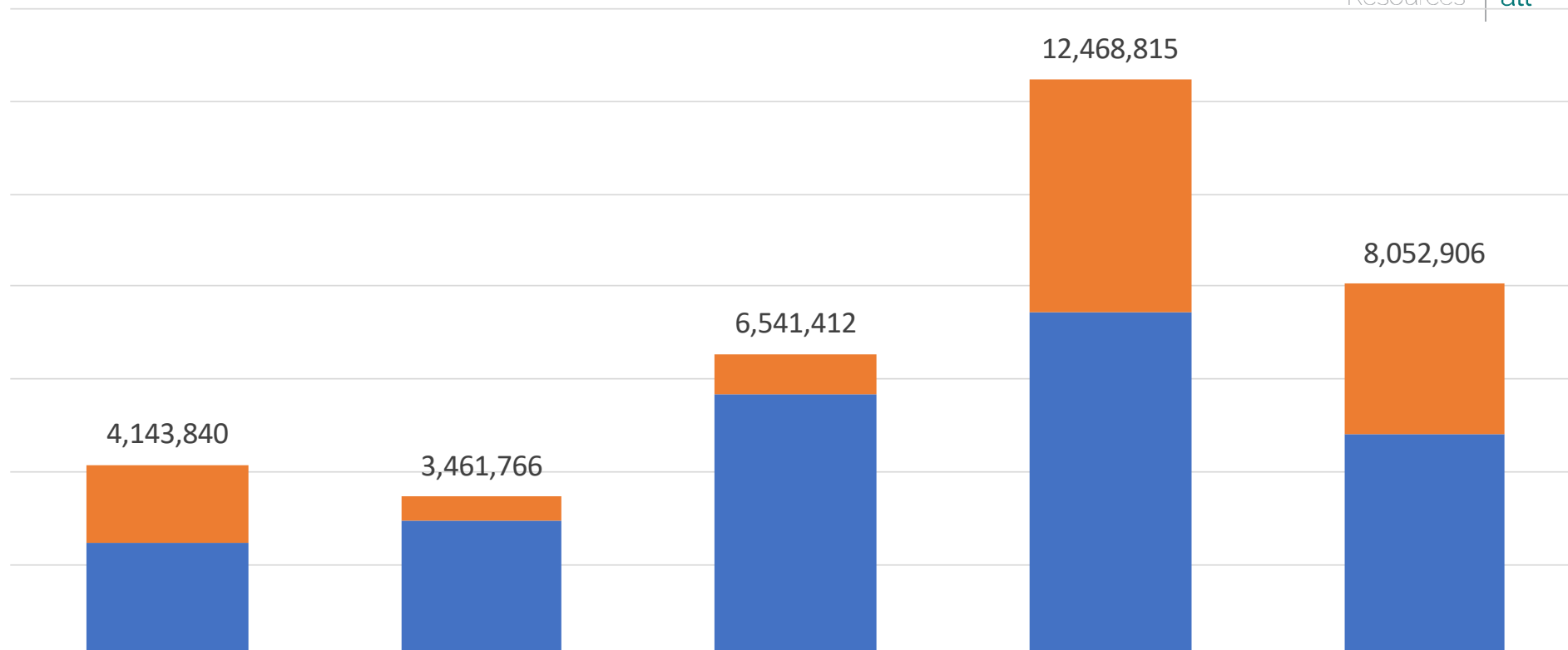
US Thermal Coal Imports – ECI/WCI Wise

(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 (30th Nov)
End Users	1,696,725	516,014	871,747	5,028,271	3,225,053
Traders	2,447,115	2,945,752	5,669,665	7,440,543	4,827,853
Total	4,143,840	3,461,766	6,541,412	12,468,815	8,052,906

US Thermal Coal Imports (by Consumer)

	2018	2019 (Upto 30 Nov)
Cement	4,185,084	3,295,705
SHREE CEMENT LIMITED	1,387,895	434,262
ULTRATECH CEMENT LIMITED	939,531	1,334,881
THE INDIA CEMENTS LIMITED	734,173	660,694
OTHER	1,123,485	865,868
Power	843,187	285,258
VEDANTA LIMITED	407,694	285,258
NAYARA ENERGY	162,224	
TATA POWER	151,634	
JINDAL STEEL & POWER LIMITED	121,635	
Traders	7,440,543	4,471,941



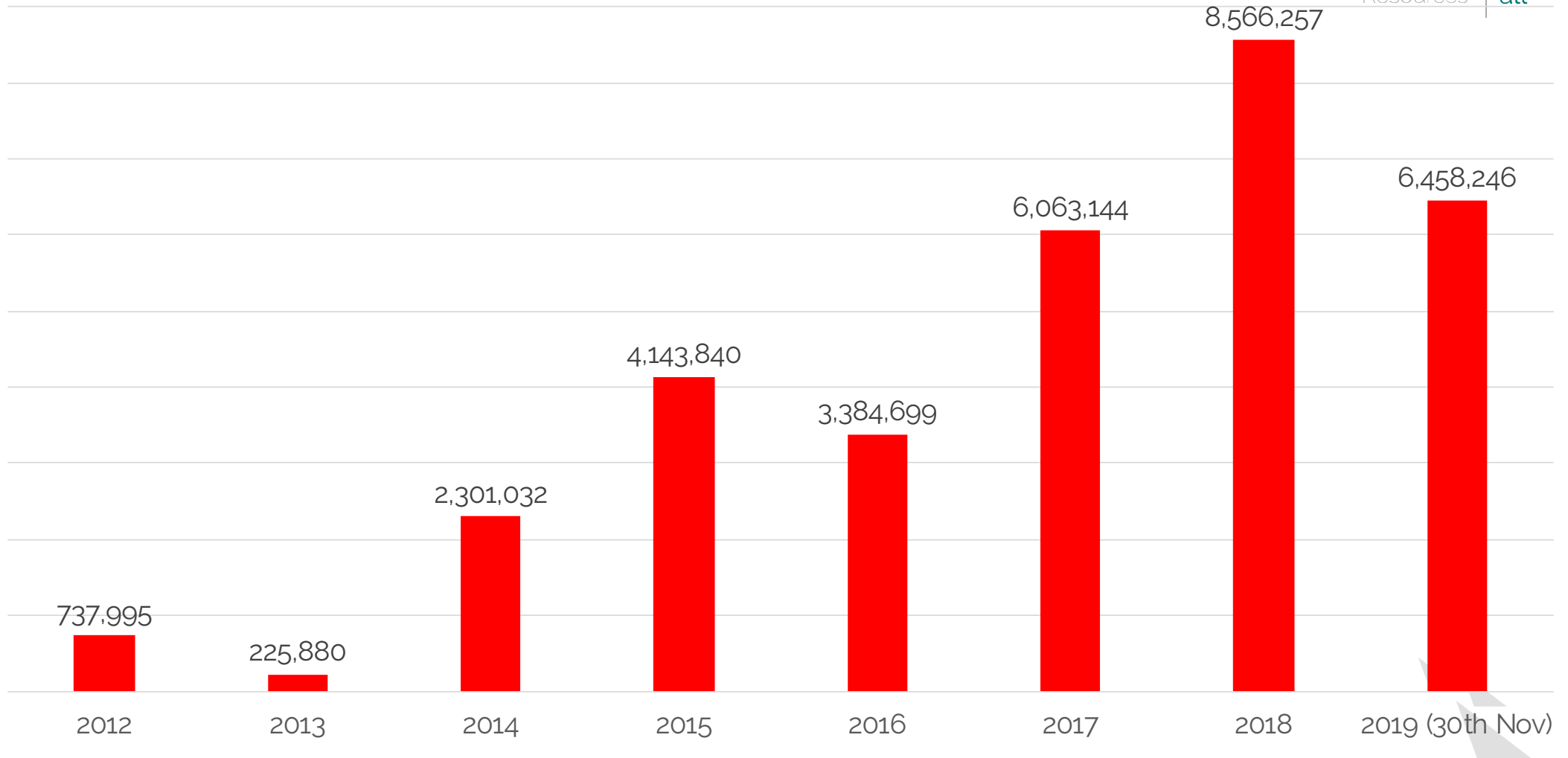
Section - 4

US NAPP Coal - Imports Overview



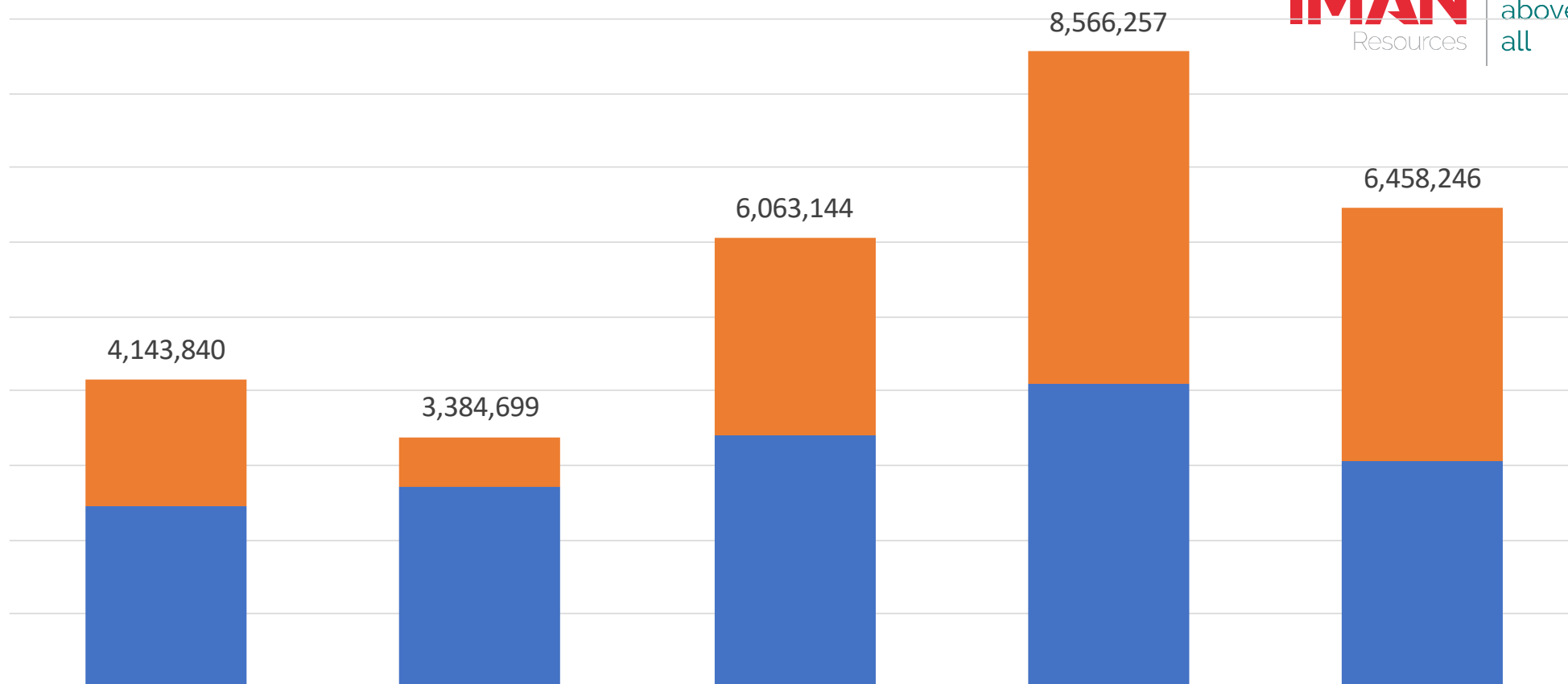
Total NAPP Coal Imports to India

(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 Nov)
Industry	1,701,074	666,345	2,674,872	4,459,602	3,407,029
Retail	2,442,766	2,718,354	3,388,272	4,106,655	3,051,217
Total	4,143,840	3,384,699	6,063,144	8,566,257	6,458,246



Section - 5

Coking Coal - Imports Overview



India's Coking Coal Imports (MoM)

India's Coking Coal Import (Metric Tons)

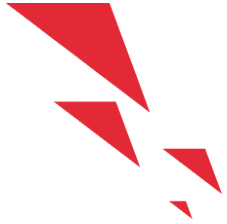
	Nov-19	Nov-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	2,491,236	3,481,031	(28.43)%	32,184,496	35,766,446	(10.01)%
CANADA	540,928	435,687	24.16 %	4,633,853	4,034,349	14.86 %
COLOMBIA				16,870	11,500	46.70 %
INDONESIA	78,000			1,091,327	466,874	133.75 %
MOZAMBIQUE	151,754	79,410	91.10 %	1,837,152	1,438,896	27.68 %
NEW ZEALAND	94,105			269,744	239,455	12.65 %
RUSSIA	60,500	20,000	202.50 %	300,820	364,434	(17.46)%
USA	189,957	202,859	(6.36)%	3,752,260	4,136,944	(9.30)%
TOTAL	3,606,480	4,218,987	(14.52)%	44,086,522	46,458,898	(5.11)%

India's Coking Coal Imports (Nov 2019)

Importing Port with Coal Origin



Port	AUSTRALIA	CANADA	INDONESIA	MOZAMBIQUE	NEW ZEALAND	RUSSIA	USA	Total
DHAMRA	683,371				21,872	33,000	45,000	783,243
ENNORE	103,700							103,700
GANGAVARAM	323,415		78,000	38,763			78,750	518,928
HALDIA / KOLKATA	212,132	25,000		53,073	18,000		33,207	341,412
JAIGARH	145,168	158,194						303,362
KANDLA / Tuna						27,500		27,500
KRISHNAPATNAM	73,059							73,059
MORMUGAO	353,518	167,419						520,937
PARADIP	399,205	125,313		14,000	54,233		33,000	625,751
VIZAG	197,668	65,002		45,918				308,588
Total	2,491,236	540,928	78,000	151,754	94,105	60,500	189,957	3,606,480



Section - 6

PCI - Imports Overview



India's PCI Imports (MoM)

India's PCI Import (Metric Tons)

	Nov-19	Nov-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	762,142	302,838	151.67 %	8,036,203	5,868,475	36.94 %
CANADA	11,901			263,096	100,081	162.88 %
RUSSIA	225,960	151,842	48.81 %	3,403,927	1,791,868	89.97 %
TOTAL	1,000,003	454,680	119.94 %	11,703,225	7,760,424	50.81 %



India's PCI Imports (Brand Wise)



India's PCI Import (Metric Tons)						
	Nov-19	Nov-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	762,142	302,838	151.67 %	8,036,203	5,868,475	36.94 %
BHP 17% VM PCI COAL				57,228	33,530	
BHP 19% VM PCI COAL	24,980			158,004		
CAPRICORN PCI COAL	87,962			654,082	264,233	
CENTURY PCI COAL		74,897		102,904	561,577	
CURRAGH 10 PCT ASH PCI COAL	32,645	9,811		234,944	103,710	
EMERALD PCI COAL					52,274	
JELLINBAH PCI COAL	210,664	40,829		2,048,707	1,860,521	
LAKE VERMONT PCI COAL	36,769	40,470		716,609	505,014	
LOW ASH PCI COAL (TSL PCI 8)	80,180	82,171		891,927	430,597	
MIDDLEMOUNT PCI COAL	89,600			366,753		
NARRABRI PCI COAL IN BULK				78,629		
PCI COAL IN BULK				431,593	259,152	
PEAK DOWNS NORTH PCI COAL				70,448	299,701	
PEGASUS PCI COAL	76,838			76,838		
POITREL PCI COAL	122,504	54,660		1,334,129	1,028,508	
SOUTH WALKER PCI COAL				552,125	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)						
	Nov-19	Nov-18	% Change	YTD 2019	YTD 2018	% Change
CANADA	11,901			263,096	100,081	162.88 %
BRULE LV PCI COAL					79,500	
PCI COAL IN BULK				74,185		
TECK CRO PCI SOFT COKING COAL	11,901			188,911	20,581	
RUSSIA	225,960	151,842	48.81 %	3,403,927	1,791,868	89.97 %
BEREZOVSKY PCI COAL					101,932	
HV PCI COAL IN BULK (Baove 25 VM)				11,400	34,540	
KRASNY BROD PCI COAL	76,860	79,490		891,331	310,276	
MV PCI COAL IN BULK (12 to 18 % VM)				96,080	156,807	
PCI COAL IN BULK	149,100	72,352		2,405,116	1,188,313	





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