



IMAN Report

India's Import – Coal & Coke

Oct 2019



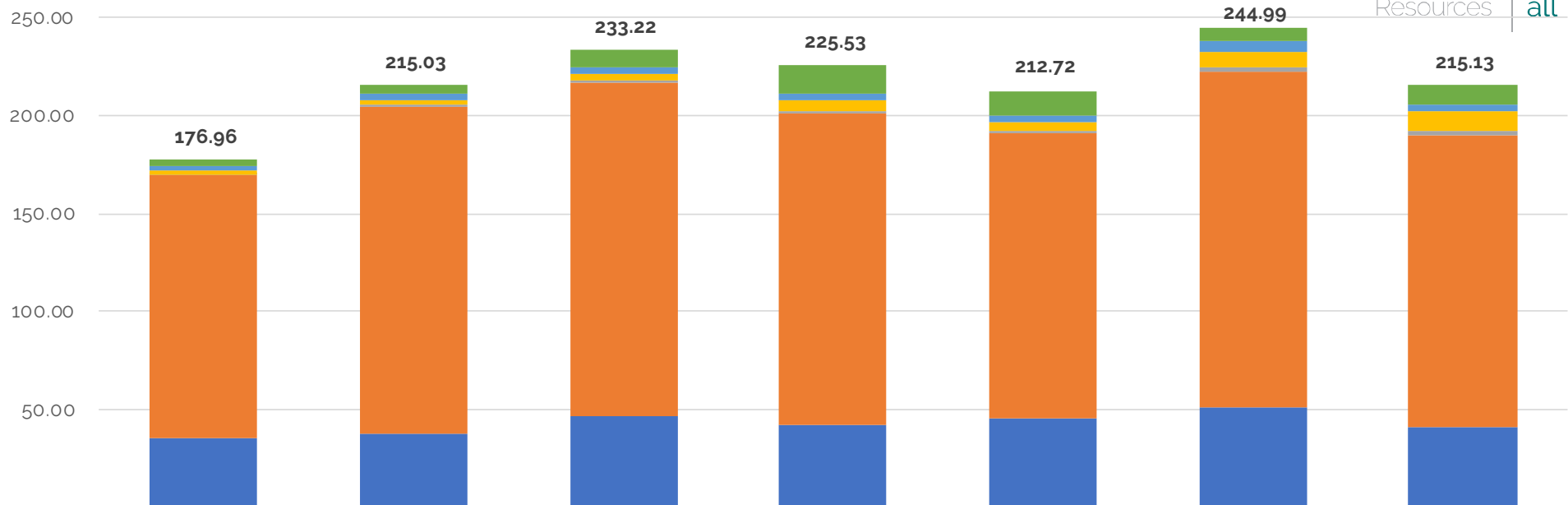


Section - 1

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 31st Oct)
PET COKE	2.78	4.36	9.19	14.59	12.42	6.83	9.73
MET COKE	2.39	2.75	3.09	3.69	3.45	5.46	2.85
PCI COAL	1.89	2.37	3.24	4.79	5.18	8.48	10.58
ANTHRACITE	0.75	1.41	1.18	1.18	1.28	1.67	1.80
THERMAL COAL	133.54	166.59	169.58	158.57	144.45	170.97	149.43
COKING COAL	35.62	37.55	46.93	42.72	45.93	51.58	40.74
Total Coal & COKE	176.96	215.03	233.22	225.53	212.72	244.99	215.13

- 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)						
	Oct-19	Oct-18	% Change	YTD 2019	YTD 2018	% Change
COKING COAL	2.990	4.091	(26.92)%	40.738	42.239	(3.55)%
THERMAL COAL	14.710	17.434	(15.62)%	149.430	141.596	5.53 %
ANTHRACITE	0.231	0.183	26.41 %	1.801	1.376	30.90 %
PCI COAL	0.732	1.135	(35.52)%	10.583	7.306	44.85 %
MET COKE	0.314	0.599	(47.64)%	2.855	4.699	(39.25)%
PET COKE	0.809	0.174	364.37 %	9.726	5.646	72.26 %
TOTAL	19.786	23.616	(16.22)%	215.133	202.861	6.05 %

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

In Oct 2018, Honorable Supreme Court issued order to clearly the restriction on Petcoke. After clarification, Cement industry has started importing high amount of Fuel Grade PetCoke

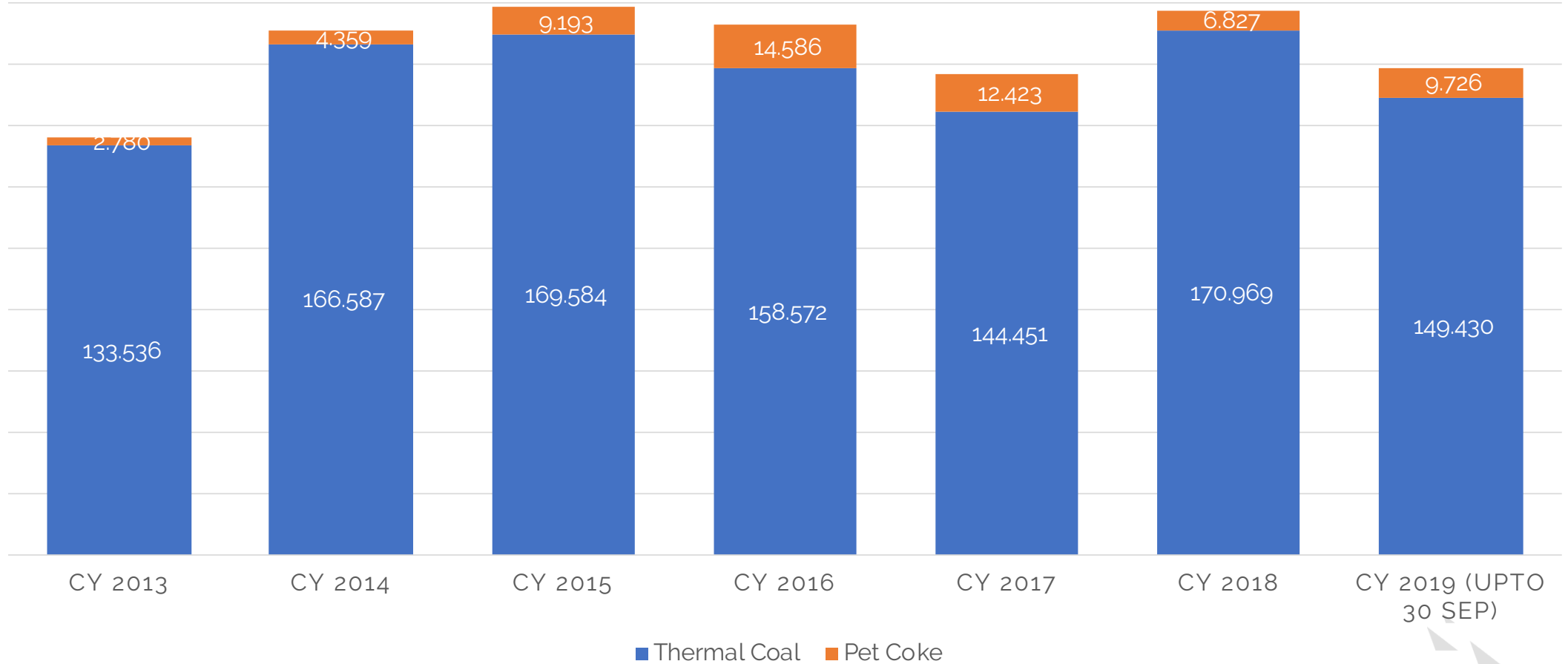


Section - 2

Solid Fuels - Imports Overview



India's Solid Fuel Imports (MMT)



India's Thermal Coal Imports (MoM)



India's Thermal Import (Metric Tons)						
	Oct-19	Oct-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	293,296	570,228	(48.57)%	2,938,055	4,516,661	(34.95)%
COLOMBIA				672,212	497,035	35.24 %
INDONESIA	10,665,905	11,895,982	(10.34)%	99,373,504	87,257,428	13.89 %
MOZAMBIQUE	243,565	443,573	(45.09)%	2,328,825	4,103,451	(43.25)%
PHILIPPINES				54,550	55,000	(0.82)%
RUSSIA		128,800	(100.00)%	2,368,583	1,754,822	34.98 %
SOUTH AFRICA	3,066,302	3,410,502	(10.09)%	34,393,602	32,340,497	6.35 %
USA	440,996	984,915	(55.22)%	7,300,669	11,070,724	(34.05)%
TOTAL	14,710,064	17,434,000	(15.62)%	149,430,000	141,595,618	5.53 %

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. This adversely affected import of US Origin Coals.

India's Thermal Coal Imports

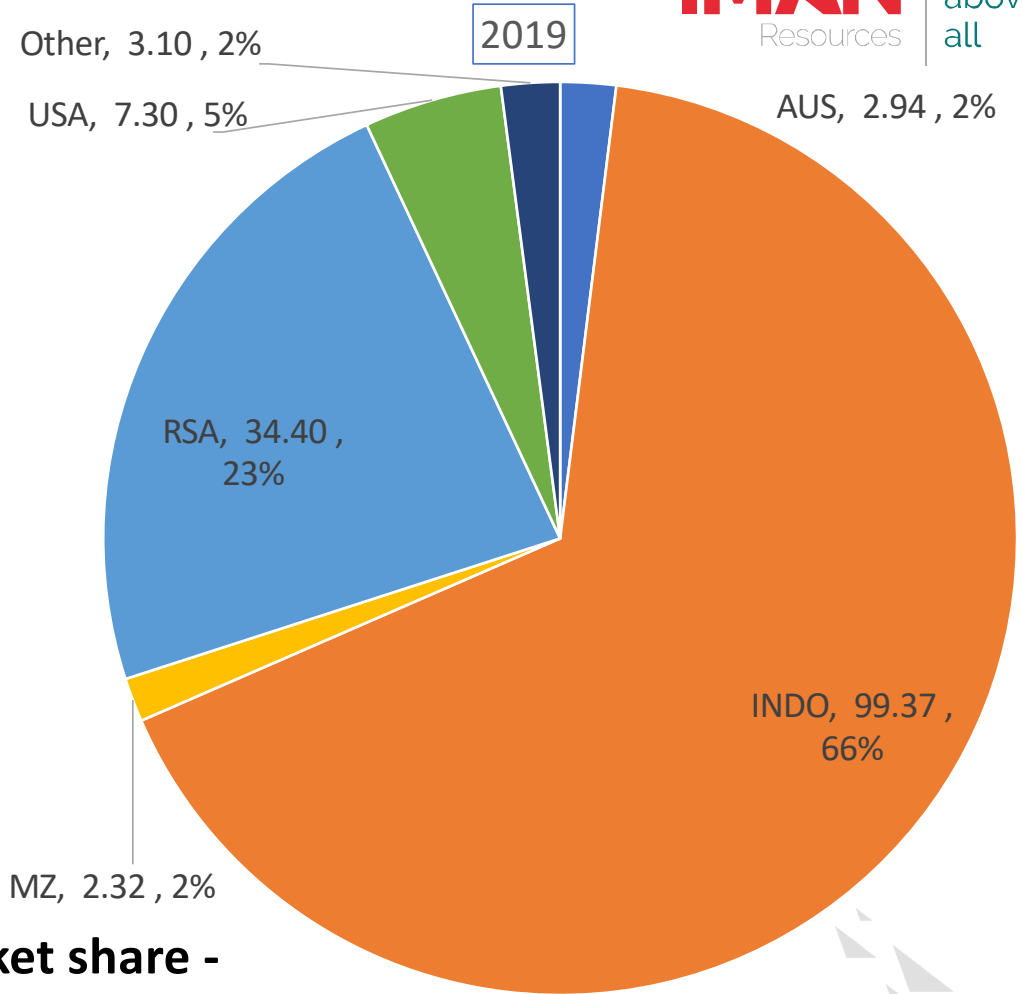
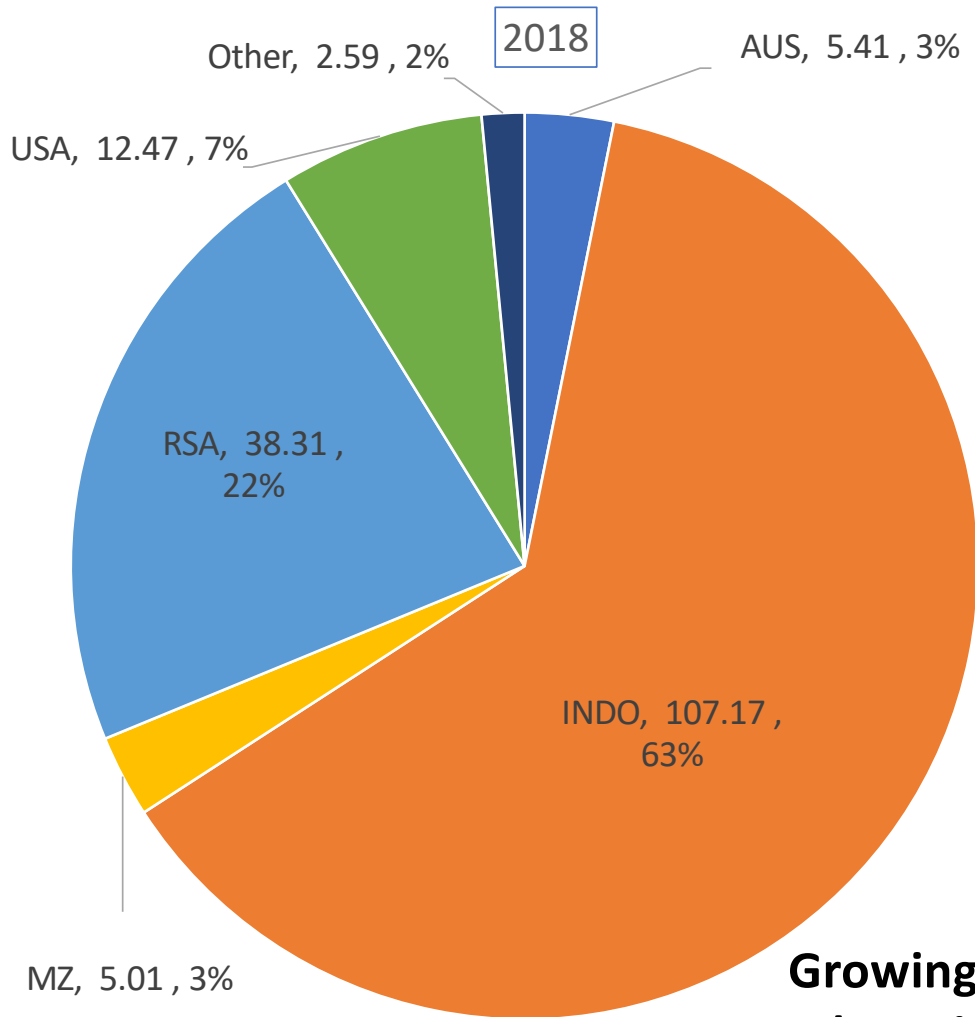
Importing Port with Coal Origin



Port	AUSTRALIA	INDONESIA	MOZAMBIQUE	SOUTH AFRICA	USA	Grand Total
BHAVNAGAR		130,109				130,109
DAHEJ		151,684		70,499		222,183
DHAMRA				217,043		217,043
DHANU		174,000				174,000
DHARAMTAR		383,615				383,615
ENNORE		964,241				964,241
GANGAVARAM		219,594		747,141		966,735
HALDIA / KOLKATA		141,982		97,265		239,247
HAZIRA / MAGDALLA / SURAT		826,353		279,421		1,105,774
JAIGARH		87,250	80,150			167,400
KAKINADA		54,950		37,000		91,950
KANDLA / TUNA		769,227		268,409	293,595	1,331,231
KARAIKAL	75,867	435,537				511,404
KRISHNAPATNAM		773,361		643,147	70,901	1,487,409
MANGALORE		66,340		55,950		122,290
MORMUGAO				55,000		55,000
MULDWARKA		52,570				52,570
MUMBAI		334,896				334,896
MUNDRA	164,929	2,353,432	163,415	162,863		2,844,639
NAVLAKHI	52,500	696,775				749,275
OKHA		56,700				56,700
PARADIP		187,950		157,499		345,449
PORBANDAR				33,000		33,000
REVDANDA		208,950				208,950
SALAYA		374,501				374,501
TUTICORIN		744,538				744,538
VIZAG		477,350		242,065	76,500	795,915
Grand Total	293,296	10,665,905	243,565	3,066,302	440,996	14,710,064

India's Coal Imports (MMT)

Data Format
Origin, Quantity, Share

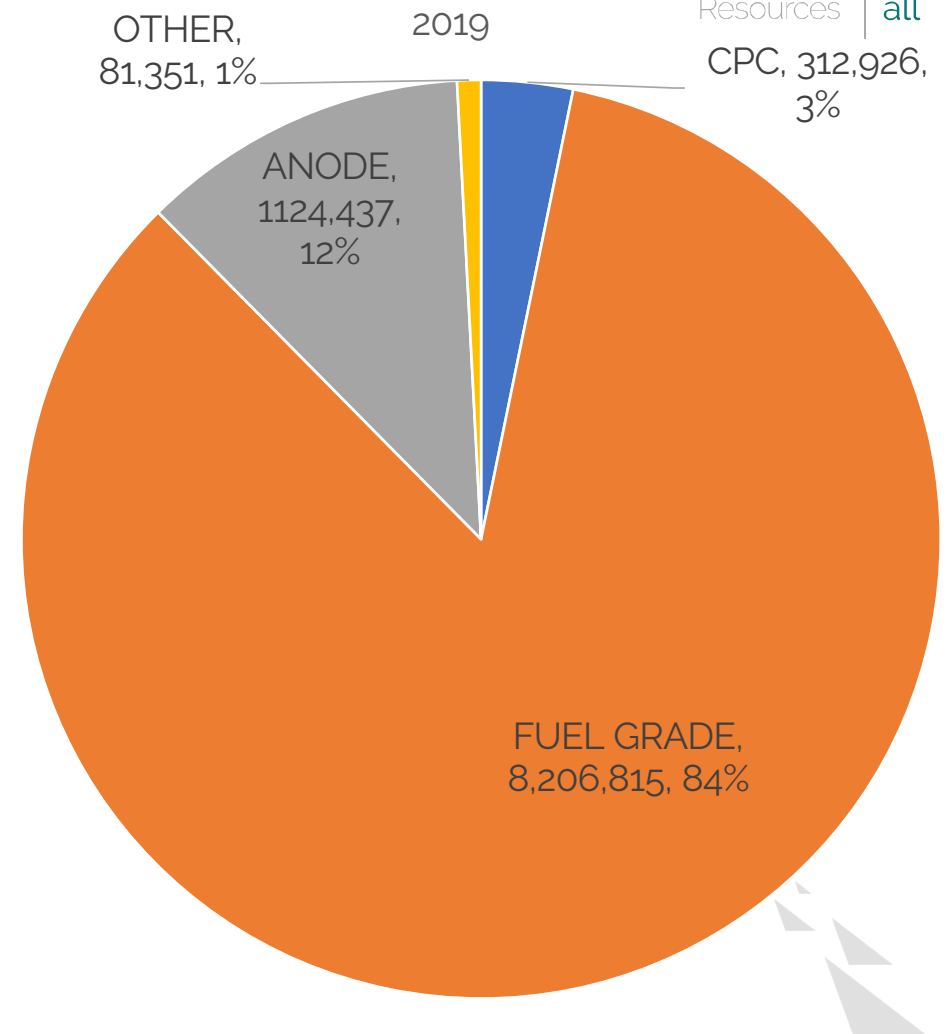
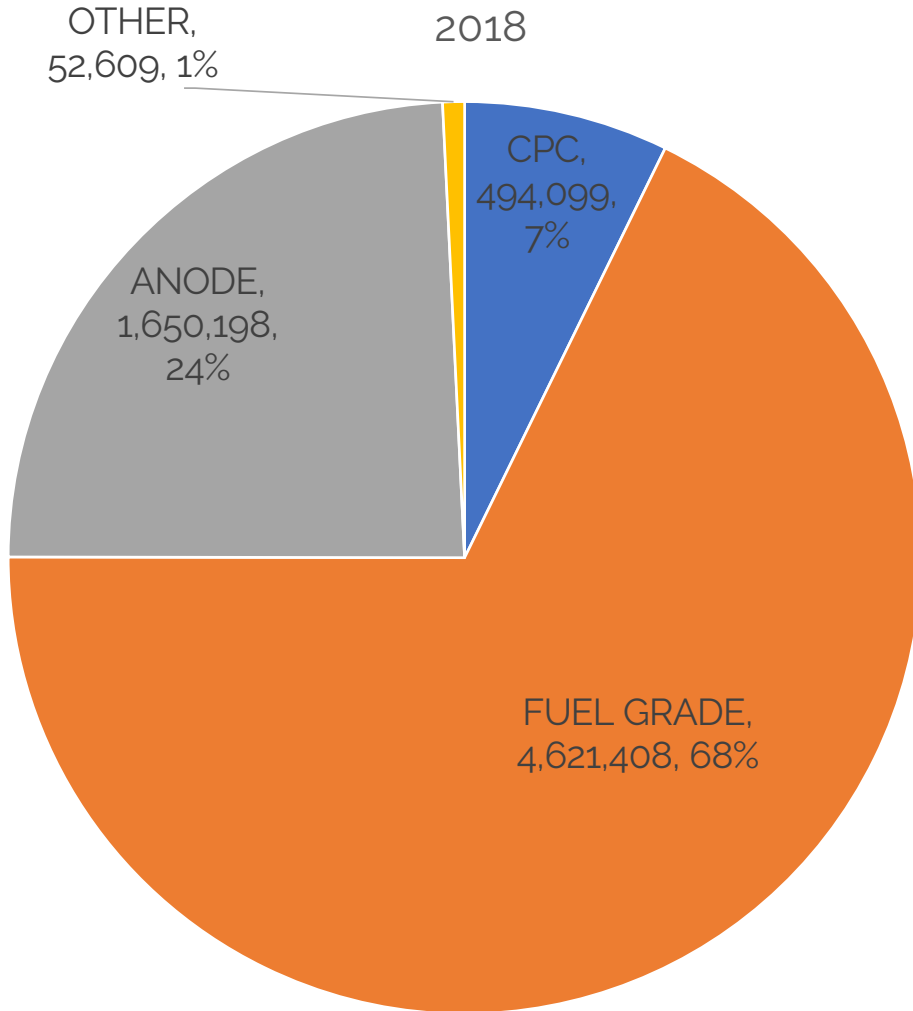


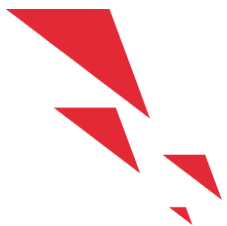
**Growing market share -
Indonesia & South Africa**

India's Pet Coke Imports (MoM)

India's Pet Coke Import (Metric Tons)						
	Oct-19	Oct-18	% Change	YTD 2019	YTD 2018	% Change
USA	3,71,820	77,213	381.55 %	48,53,977	26,80,052	81.12 %
SAUDI ARABIA	2,95,542	96,901	204.99 %	31,88,335	17,56,253	81.54 %
CHINA	31,934	39		6,21,663	5,56,386	11.73 %
KUWAIT				1,08,601	1,81,221	(40.07)%
INDONESIA				1,15,167	1,65,336	(30.34)%
OMAN	37,932			2,92,902	27,500	965.10 %
CANADA				1,49,439		
Other	72,169	147		3,95,445	2,78,987	41.74 %
TOTAL	8,09,397	1,74,300	364.37 %	97,25,530	56,45,735	72.26 %

India's Pet Coke Imports (Grade Wise)





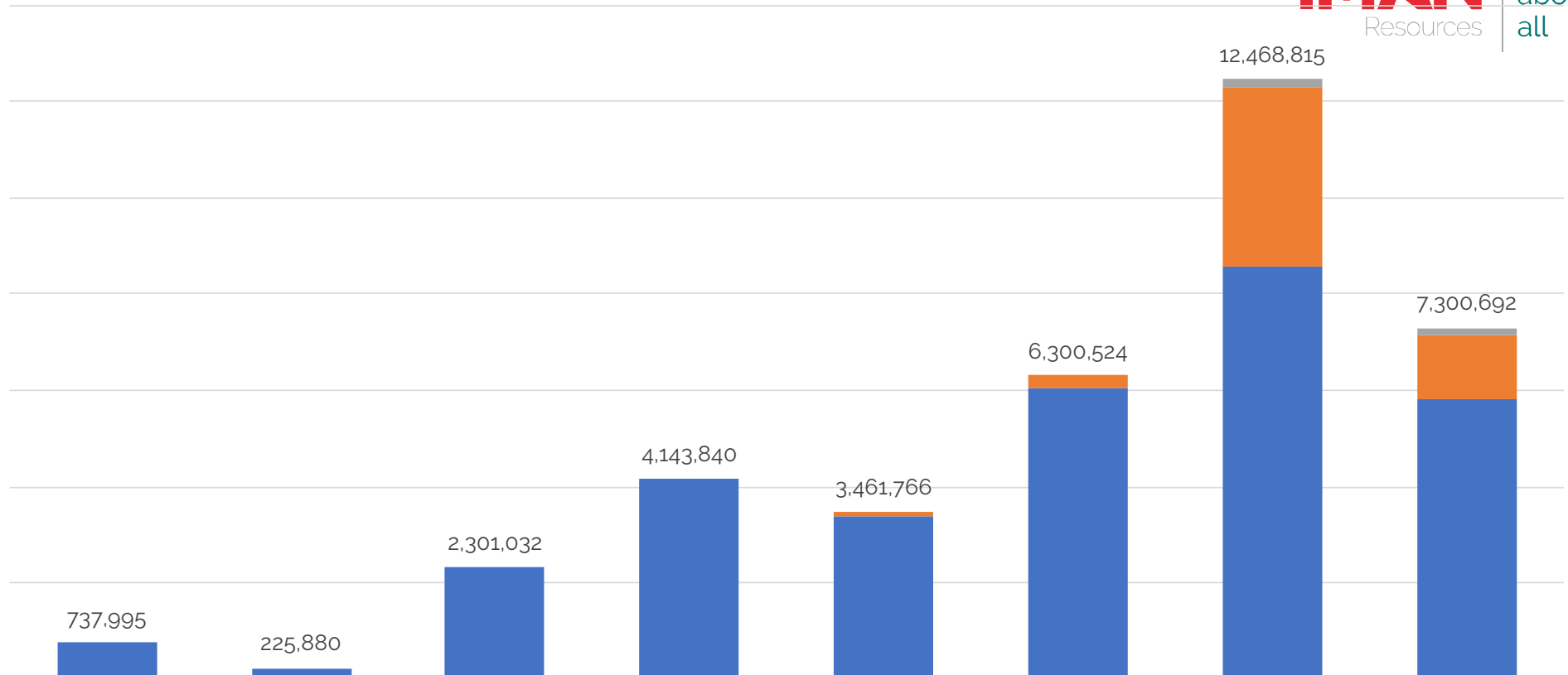
Section - 3

US Thermal Coal - Imports Overview



US Thermal Coal Imports – Quality Wise

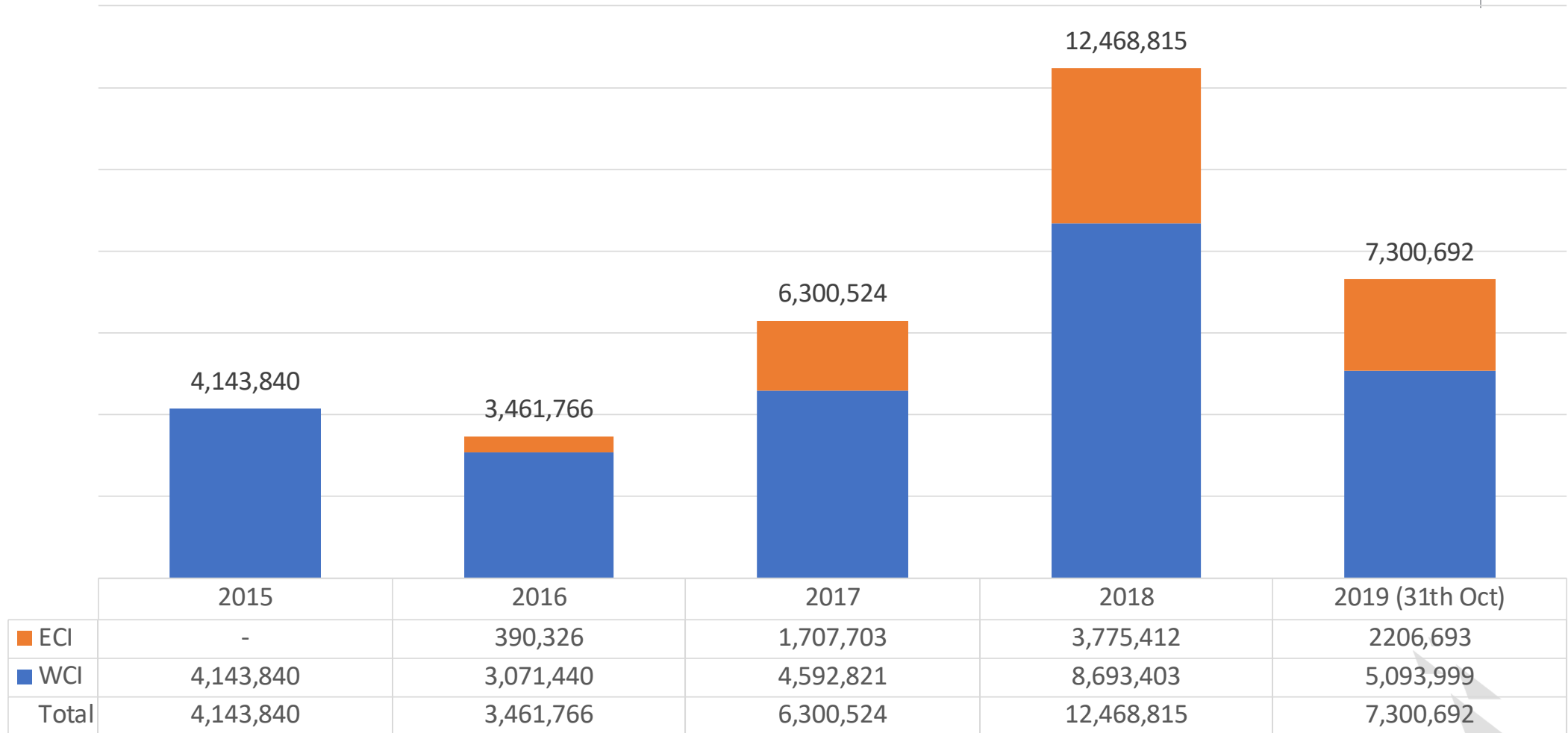
(Data based on Arrival of Vessels at Discharge port / in MT)



	2012	2013	2014	2015	2016	2017	2018	2019 (31th Oct)
■ PRB/Utah							162,224	160,405
■ ILB					77,067	237,380	3,740,334	1344,549
■ NAPP	737,995	225,880	2,301,032	4,143,840	3,384,699	6,063,144	8,566,257	5,795,738
Total	737,995	225,880	2,301,032	4,143,840	3,461,766	6,300,524	12,468,815	7,300,692

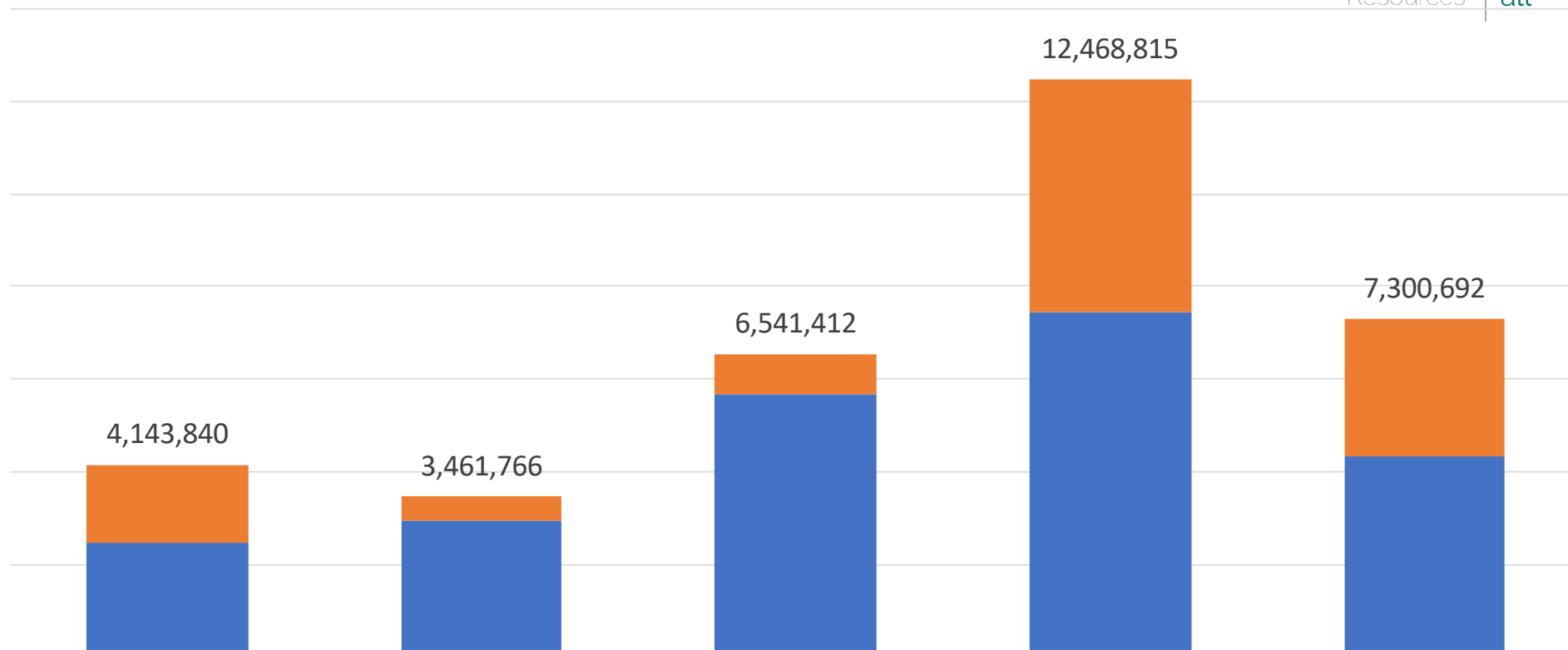
US Thermal Coal Imports – ECI/WCI Wise

(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 (31th Oct)
End Users	1,696,725	516,014	871,747	5,028,271	2,990,317
Traders	2,447,115	2,945,752	5,669,665	7,440,543	4,310,375
Total	4,143,840	3,461,766	6,541,412	12,468,815	7,300,692

US Thermal Coal Imports (by Consumer)



	2018	2019 (Upto 31 Oct)
Cement	4,185,084	3,283,764
SHREE CEMENT LIMITED	1,387,895	434,262
ULTRATECH CEMENT LIMITED	939,531	1,184,334
THE INDIA CEMENTS LIMITED	734,173	629,194
OTHER	1,123,485	1,035,974
Power	843,187	201,069
VEDANTA LIMITED	407,694	201,069
NAYARA ENERGY	162,224	
TATA POWER	151,634	
JINDAL STEEL & POWER LIMITED	121,635	
Traders	7,440,543	3,815,855



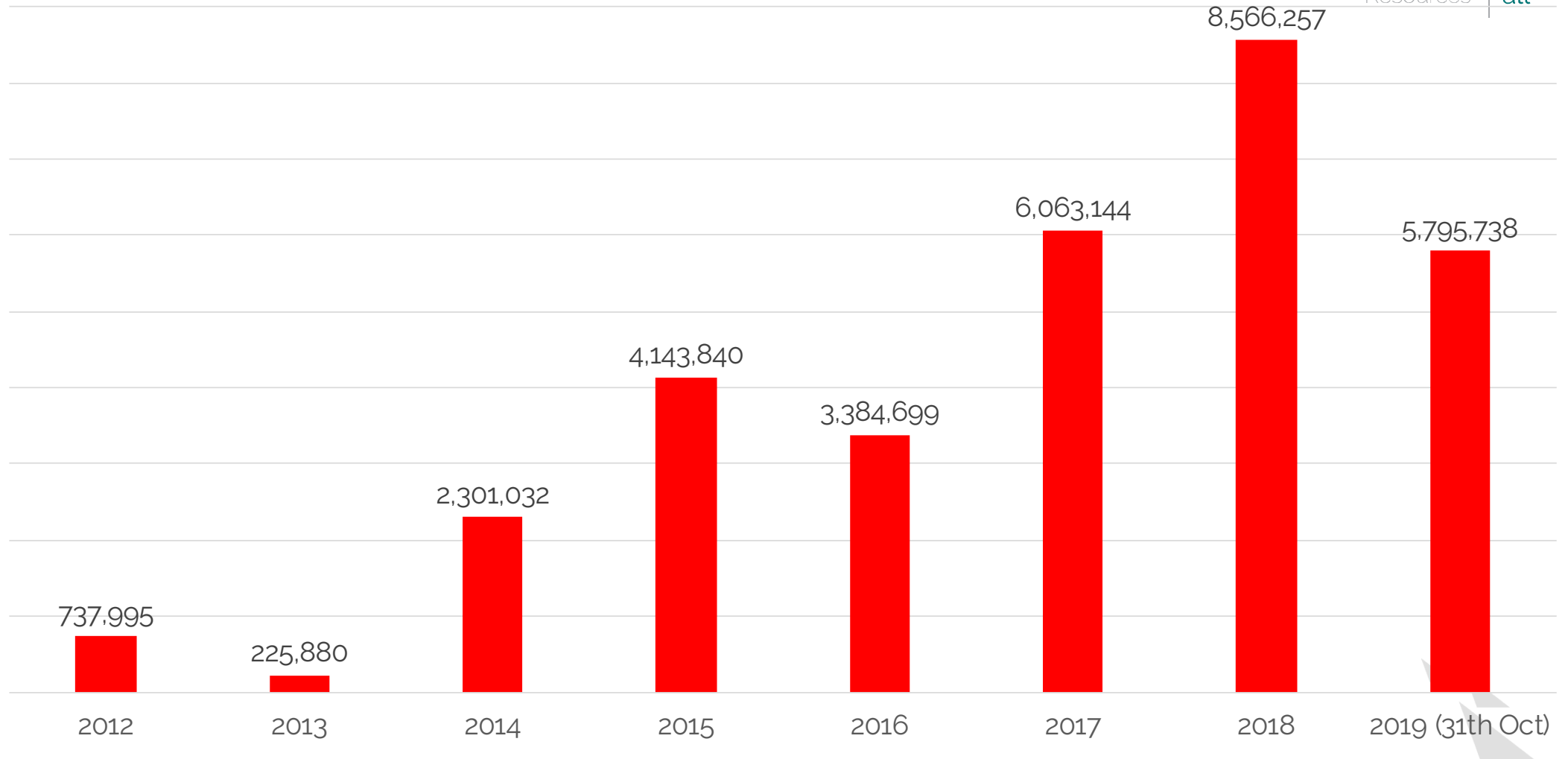
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US NAPP Coal - Imports Overview



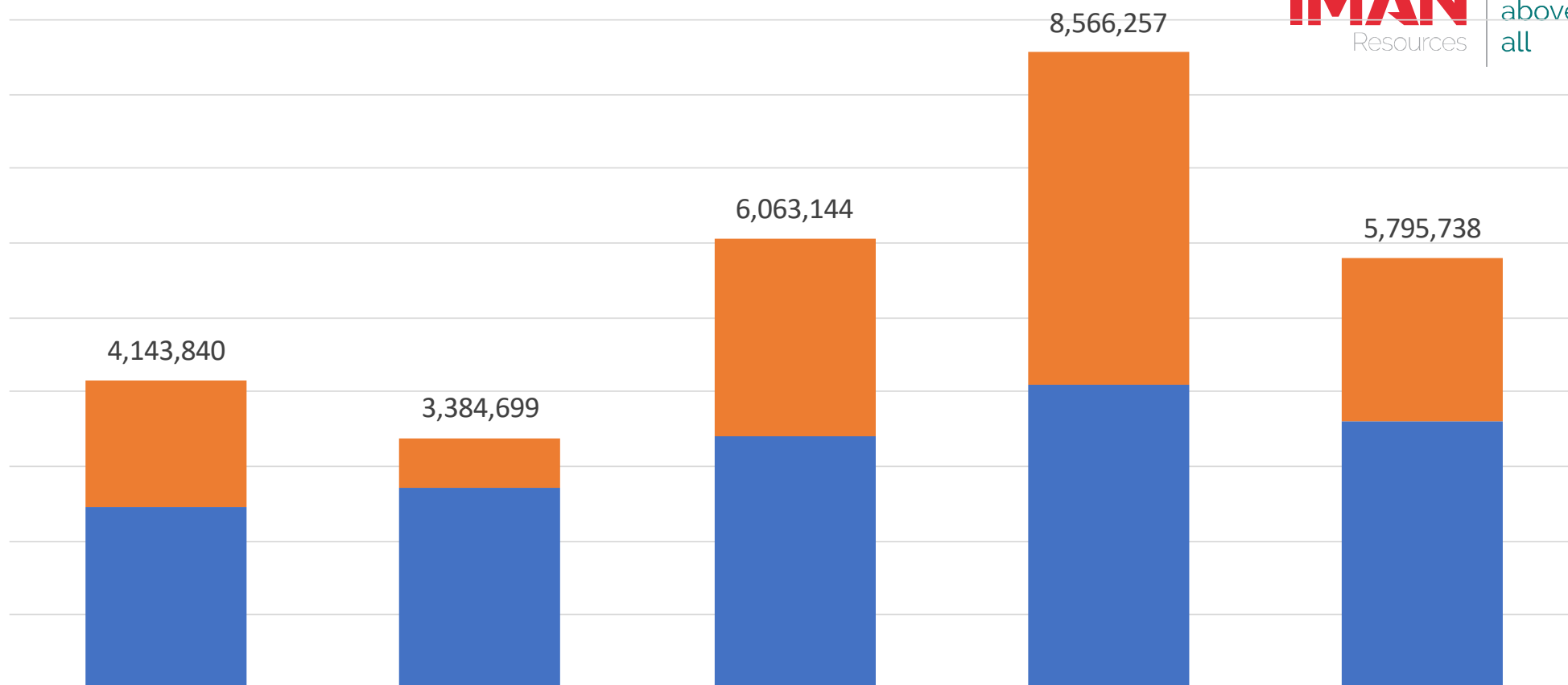
Total NAPP Coal Imports to India

(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 (31th Oct)
Industry	1,701,074	666,345	2,674,872	4,459,602	2,197,758
Retail	2,442,766	2,718,354	3,388,272	4,106,655	3,597,980
Total	4,143,840	3,384,699	6,063,144	8,566,257	5,795,738



Section - 5

Coking Coal - Imports Overview



India's Coking Coal Imports (MoM)



India's Coking Coal Import (Metric Tons)

	Oct-19	Oct-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	2,378,153	3,072,131	(22.59)%	29,964,365	32,285,415	(7.19)%
CANADA	164,130	358,041	(54.16)%	4,092,925	3,598,662	13.73 %
COLOMBIA				16,870	11,500	46.70 %
INDONESIA		91,555	(100.00)%	1,013,327	466,874	117.05 %
MOZAMBIQUE	193,961	202,408	(4.17)%	1,685,398	1,359,486	23.97 %
NEW ZEALAND				141,789	239,455	(40.79)%
RUSSIA	25,700	30,414	(15.50)%	266,020	344,434	(22.77)%
USA	228,152	336,711	(32.24)%	3,562,303	3,934,085	(9.45)%
TOTAL	2,990,096	4,091,260	(26.92)%	40,742,997	42,239,911	(3.54)%



Section - 6

PCI - Imports Overview



India's PCI Imports (MoM)



India's PCI Import (Metric Tons)

	Oct-19	Oct-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	455,126	871,228	(47.76)%	7180,022	5565,637	29.01 %
CANADA	74,185			251,194	100,081	150.99 %
RUSSIA	203,022	264,000	(23.10)%	3152,267	1640,026	92.21 %
TOTAL	732,333	1135,228	(35.49)%	10,583,483	7,305,744	44.87 %



India's PCI Imports (Brand Wise)



India's PCI Import (Metric Tons)						
	Oct-19	Oct-18	% Change	YTD 2019	YTD 2018	% Change
AUSTRALIA	495,840	871,228	(43.09)%	7,180,022	5,565,637	29.01 %
BHP 17% VM PCI COAL		33,530		57,228	33,530	
BHP 19% VM PCI COAL				133,024		
CAPRICORN PCI COAL		72,970		566,120	264,233	
CENTURY PCI COAL		73,966		102,904	486,680	
CURRAGH 10 PCT ASH PCI COAL	70,396	9,304		202,299	93,899	
EMERALD PCI COAL	109,798				52,274	
JELLINBAH PCI COAL	115,578	437,889		1755,739	1819,692	
LAKE VERMONT PCI COAL	76,150	32,926		679,840	464,544	
LOW ASH PCI COAL (TSL PCI 8)		80,493		811,747	348,426	
MIDDLEMOUNT PCI COAL				277,153		
NARRABRI PCI COAL IN BULK				78,629		
PCI COAL IN BULK	76,918	24,400		424,593	259,152	
PEAK DOWNS NORTH PCI COAL				70,448	299,701	
POITREL PCI COAL		27,000		1211,625	973,848	
SOUTH WALKER PCI COAL				552,125	201,430	
WERRIS CREEK LOW ASH PCI COAL		78,750		228,465	157,710	
YARRABEE PCI COAL	47,000			28,083	110,518	

India's PCI Imports (Brand Wise)



India's PCI Import (Metric Tons)						
	Oct-19	Oct-18	% Change	YTD 2019	YTD 2018	% Change
CANADA	74,185	,000		251,194	100,081	150.99 %
BRULE LV PCI COAL					79,500	
PCI COAL IN BULK	74,185			74,185		
TECK CRO PCI SOFT COKING COAL				177,009	20,581	
RUSSIA	203,022	264,000	(23.10)%	3,152,267	1,640,026	92.21 %
BEREZOVSKY PCI COAL					101,932	
HV PCI COAL IN BULK (Baove 25 VM)				11,400	34,540	
KRASNY BROD PCI COAL	75,070			814,471	230,786	
MV PCI COAL IN BULK (12 to 18 % VM)				96,080	156,807	





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