

Coal and Clean Coal Report

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Market Intelligence

For the first time China became a net importer of coal last year. Demand from Southern and South Eastern provinces was met by cheaper imports from Indonesia and Australia rather than more expensive coal from the provinces of Shanxi and Inner in the north, due to logistic costs. Furthermore the rail network in China can only transport half of the country's demand, and despite investments in the sector is unlikely to meet demand in the near-term. Domestic supply is also likely to diminish owing to the country's strategy of consolidating the nation's mines to eventually close unsafe and inefficient mines. Consequently China is ensuring security of supply through a mixture of bi-lateral trade agreement and acquisitions of overseas mining assets. One of the most ambitious is China's Coal Geology Engineering Corporation and Wanbei Coal Electricity Group's plan to develop a potential 10 billion tonne coal resource in Queensland, Australia. Bi-lateral trade agreements have been signed with Mongolia, North Korea and Vietnam. Only time will tell whether China will rely more on seaborne or overland imports to meet demand; although, for the latter, improvement's in rail infrastructure will be needed.

A similar situation exists in India, where companies are buying up coal assets overseas, particularly in Australia, and are importing more coal. As domestic coal production is unlikely to meet growing demand even if logistics and operations within the country are substantially improved. Elsewhere, coal demand is expected to grow, but not at the same pace as China and India, due to rising natural gas prices. Traditional coal-fired power plants will continue to be phased out and replaced with modern plants with low emissions and some form of carbon capture and storage. The biggest investors in CCS are and policies covering CCS are starting to emerge. However, to date, the sector is not eligible for carbon credits and very few demonstration projects are in operation. Thus, an alternative to CCS in the short-term could be co-firing power plants with both coal and biomass, as the biomass proportion of the plant may be eligible for subsidies and count towards renewable energy targets.

At the production level, more mines will use methane from both operating and abandoned mines. As the project would both provide revenues from electricity production, methane sales and from any greenhouse gas emission reduction incentives, and improve mine safety. By preventing methane build-up, which is thought to be the cause of Pike River mine accident in New Zealand and numerous mining accidents worldwide. NRG EXPERT expects the use of methane to increase more in the short-term than underground coal gasification, which still has several technical and policy barriers to its deployment. However, if deployed UCG would allow some countries to tap unexploited coal resources. The UK is one of the country's leading the development of the sector with a total of fourteen conditional near offshore UCG licenses awarded to date.

Highlights

In the near and long-term India, China and perhaps Brazil are expected to drive growth for coking coal for the domestic steel sector following projections of strong growth in steel production and consumption in these countries. Demand for coal will be driven more by China than India, in the former coal will be increasingly used to produce a liquid fuel and chemicals such as olefins, a long-chain polymer synthetic fiber, to reduce the country's reliance on imports.

Australia, Indonesia and South Africa are expected to remain as major exporters, with growth in exports from Russia, Mongolia and other countries in the region to meet demand from China and, to a lesser extent, India.

For the US mining sector, operations in the Power River Basin region may increase. But will be balanced out by a reduction in output from the East Appalachian region that mainly uses invasive mountain-top mining operations. Any resurgence in the US coal mining sector will only occur with improved clarity regarding the permitting process, and incentives ensure domestic coal is cheaper than imports.

The switch from underground to surface mining is expected to continue along with the consolidation of mining assets. More mergers and acquisitions involving big players are likely.

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Contents

1. Executive Summary	21
2. Global Overview	22
Coal Production	22
Coal Demand	23
Coal Demand by Country	24
International Coal Trade	29
Coal-fired Power Generation	30
Global Energy Reserves	35
3. Coal Rank	38
Primary Coal	39
Secondary Coal	40
Coke Coal	40
Metallurgical Coal	40
Hard Coal	40
Coal Rank	40
Anthracite	40
Bituminous Coal	40
Sub-bituminous Coal	40
Lignite	40
Steam coal	40
Brown coal	40
Heat Content of Coal or Calorific Value	41
4. International Coal Trade	43
Structure of the International Coal Trade	43
Geographical Distribution of International Coal Production and Trade	43
Development of the Single Global Coal Market	49
The USA	52
Canada	53
Emergence of Australia as the Leading Exporter	53
South Africa	53
New Entrants	54
Regional Markets and Trade Patterns	54
Future Trading Patterns	54
International Coal Prices	56
McCloskey Coal Information Services (MCIS) NWE Steam Coal Marker Price	56
Steam Coal Prices	57
Coking Coal Prices	60
Fossil Fuel Prices	60
Steel Production	61

5.	Shipping and Freight Rates	65
	Freight as a Component of Coal Prices.....	65
	Ocean Freight Rates	65
	Price Indexes	69
	Ocean Vessel Categories	70
	Cape Vessels.....	70
	Panamax Vessels	70
	HandyMax Vessels	70
	Fleet Size	70
6.	New Technologies – Extraction and Environment	71
	Clean Coal Technologies (CCT)	71
	Switch to a cleaner fuel or reduce load to burn less of a ‘dirty’ fuel.....	71
	Efficiency improvement.....	71
	Clean coal technology (CCT).....	73
	Carbon Abatement Technologies	74
	Improvement in Combustion Efficiencies.....	74
	Co-firing with CO ₂ Neutral Biomass Fuels	75
	Carbon Capture and Storage or Carbon Sequestration (CCS)	75
	Cost-benefit of carbon capture and storage (CCS)	78
	Support and prospects for carbon capture and storage (CCS)	78
	Major barriers to the development of carbon capture and storage (CCS).....	85
	New Coal Extraction Technology	93
	Underground Coal Gasification (UCG)	93
	Coal Mine Methane	97
7.	Environment.....	106
	The Kyoto Protocol	108
	Copenhagen Accord.....	108
	The Environmental Legislation of the EU	109
	LCPD - Large Combustion Plant Directive	109
	ETS Emissions Trading Directive	110
	The Environmental Legislation of the US.....	110
	Clean Air Act and Amendments.....	111
	Existing Programmes under the Clean Air Act	111
	Effects of Compliance on Regional Coal Supply and Demand	112
	Clear Skies Act	113
	Japan	114
	China	114
	India.....	115
8.	China.....	116
	Economic Background	116
	Primary Energy.....	116

The Coal Sector	117
Future of Coal.....	119
Coal Quality.....	120
Geographical Distribution of Coal Reserves and Mines in China	120
Production.....	122
Mine safety	123
Chemicals from Coal	124
Coal Companies.....	125
China Shenhua Energy Group CSEC.....	125
China National Coal Group Corporation	127
Datong Coal Mining Group	128
Yanzhou Coal Mining Company Limited.....	128
Shangxi Coke Group.....	128
Steel Industry.....	128
Power Generation.....	129
Imports and Exports of Coal.....	132
Transport	136
Coal Ports	137
Rail.....	138
Inland Waterways	139
The Grand Canal	139
Coal Slurry Pipeline	139
Environmental Impact.....	140
Impact of Coal Combustion.....	140
Carbon Dioxide	140
Sulphur.....	141
Oxides of Nitrogen	142
Low NO _x Burners.....	142
Particulates	142
Coal Preparation	142
Integrated Coal Gasification Combined Cycle (IGCC)	143
9. USA.....	144
Economic Background	144
Primary Energy.....	144
Coal Sector	145
Imports and Exports.....	149
Geographical Distribution of Coal Reserves	151
Coal Quality.....	162
Coal Producers	162
Peabody Energy Corporation.....	165
Arch Coal, Inc	167

Cloud Peak Energy	168
Alpha Natural Resources	169
CONSOL Energy Inc.....	172
Massey Energy Company.....	174
North American Coal Corporation.....	175
Kiewit Mining Group.....	175
Patriot Coal Corporation	176
Alliance Resource Partners	176
Murray Energy Corporation	178
Westmoreland Coal Company.....	178
Other mining companies	179
Coal Mines	180
Power Generation	182
Transport	184
Rail, inland shipping and road	184
Ports.....	185
Environmental Impact	186
Air Pollution.....	187
Energy Use and Carbon Emissions.....	188
Energy and Carbon Intensity	189
10. Australia	190
Economic Background.....	190
Primary Energy.....	190
Coal Sector	190
Coal Quality.....	193
Geographical Distribution of Coal Reserves	194
Coal Producers	207
Anglo Coal Australia (Anglo American Australia)	207
BHP Billiton	209
Rio Tinto.....	211
Xstrata.....	212
Power Generation	215
Transport	219
Rail.....	219
Conveyors.....	220
Road Transport	220
Ports.....	220
Shiploading and Blending.....	223
R&D	223
11. South Africa	224
Economic Background	224

Primary Energy	224
Coal Sector	224
Coal Quality.....	227
Geographical Distribution of Coal Reserves	228
Coal Producers	230
Anglo Operations	231
BHP Billiton	233
Exarro.....	233
Sasol	234
Synthetic Fuels	234
Exports.....	236
Rail infrastructure	237
Environmental Impact	238
12. Poland	239
Economic Background	239
Primary Energy	239
Coal Sector	240
History.....	241
Coal Consumption.....	242
Coal Quality.....	244
Coal Reserves.....	244
Geographical Distribution of Coal Reserves and Mines in Poland.....	244
Coal Producers	245
Power Generation	246
Transport	247
Rail.....	247
Environmental Impact	247
Environmental Conditions and Crises.....	248
Environmental Outlook.....	249
13. Russia	250
Economic Background	250
Primary Energy	250
Coal Sector	251
Coal Industry Restructuring.....	252
Coal Quality.....	253
Coal Reserves.....	253
Geographical Distribution of Coal Reserves and Mines in Russia.....	254
Coal Producers	254
Mine Safety.....	260
Power Generation.....	260
Transport	261

Ports.....	261
Environmental Impact	263
Outlook for Coal	263
14. India.....	264
Economic Background	264
Primary Energy	264
Coal Sector	264
Coal Quality.....	269
Reserves and Geographical Distribution of Mines and Coalfields	270
Coal Producers	272
Major Coal Producers in India.....	273
Coal India Ltd.....	273
Bharat Coking Coal Ltd. (Bihar).....	275
South-Eastern Coalfields Ltd. (Madhya Pradesh)	275
Central Coalfields Ltd. (Bihar).....	275
Mahanadi Coalfields Ltd. (Orissa)	276
Northern Coalfields Ltd., NCL (Madhya Pradesh)	276
Eastern Coalfields Ltd. (West Bengal)	277
Western Coalfields Ltd. (Maharashtra)	277
North-Eastern Coalfields.....	278
Singareni Collieries Company Ltd	278
Neyveli Lignite Corporation Ltd.....	279
Tata Iron Steel Company Ltd.....	279
Power Industry	279
The Coke Industry.....	281
Secondary steel sector	281
Foundries, Chemical Units and Ferro-alloy Operations.....	282
Integrated Steel Plants.....	282
Secondary Steel Sector – Pig-iron Plants.....	282
Cement Industry.....	282
Liberalisation of the Coal Market.....	282
Imports.....	283
Exports.....	283
Transport	283
Water Transport	284
Ports.....	284
Environmental Impact	285
15. Canada.....	286
Economic Background	286
Primary Energy	286
Coal Sector	287

Coal Quality.....	290
Coal Reserves.....	290
Geographical Distribution of Coal Reserves and Mines.....	290
Tar Sands.....	292
Coal Producers	292
Coal Mines	294
Power Generation	295
Transport	297
Environmental Impact	297
Air Pollution.....	298
Energy Use and Carbon Emissions.....	298
Renewable Energy.....	298
Outlook.....	298
16. Indonesia.....	300
Economic Background	300
Primary Energy	300
The Coal Sector	301
Coal Quality.....	304
Coal Reserves.....	304
Geographical Distribution of Coal Reserves and Mines in Indonesia.....	304
Coal Producers	305
Power Generation	308
Exports.....	309
Environmental Impact	311
17. United Kingdom.....	312
Economic Background	312
Primary Energy	312
Coal Sector	313
Coal Reserves.....	315
Coal Production.....	316
Power Generation	319
Future of Coal Power Generation	320
Transport	321
Environmental Impact	321
The Future of Coal.....	322
Methane.....	323
18. Colombia	327
Economic Background	327
Primary Energy	327
Coal Sector	327
Exports.....	329

Coal Quality.....	329
Coal Reserves.....	330
Coal Producers	331
Power Generation.....	332
Outlook	332
19. Venezuela	335
Economic Background	335
Primary Energy	335
Coal Sector	335
Coal Quality.....	337
Geographical Distribution of Coal Reserves and Mines.....	337
Coal Producers	338
Orimulsion	339
Infrastructure.....	339
20. Notes and Sources.....	341
Technical Notes	341
21. Statistics	342
22. Appendix	351
The Greenhouse Effect and Global Climate Change.....	351
Greenhouse Gas Sources and Sinks.....	351
Water Vapour.....	352
Carbon Dioxide	352
Methane	352
Nitrous Oxide	352
Halocarbons and Other Gases (CFCs).....	353
HFCs.....	353
PFCs	353
'Kyoto gases' (HFC, PFC, and SF6).....	354
Other Important Radiative Gases	354
Relative Forcing Effects of Various Gases.....	354
The Kyoto Protocol	355
Differentiated Targets	355
Commitment Period	355
Six Gases.....	355
Demonstrable Progress	356
Land Use and Forestry	356
Flexibility Mechanisms.....	356
Emissions Trading	356
Joint Implementation.....	356
Joint Fulfillment.....	356
Clean Development Mechanism.....	356

Entry into Force.....	356
23. Sources	357

Tables

Table 2-1: The biggest coal producers, Mt

Table 3-1: Qualities of Steam Coal Traded on the World Market

Table 3-2: Qualities of Coking Coal Traded on the World Market

Table 3-3: Major Coal Producers and Heat Value per t

Table 4-1: Development of FOB Prices in US \$ per tonne in Important Supplier Countries

Table 4-2: Largest Steel Makers in the World, Production, Mt, 2009

Table 5-1: Capacities of the Bulk Carrier Fleet Forecast Based on Order Books and Delivery Dates

Table 6-1: Thermal Efficiency of Different Generation Technologies

Table 6-2: CO₂ capture in power plants

Table 6-3: Phase II Large-scale Industrial Carbon Capture and Storage Selections for ARRA funding

Table 6-4: Clean Coal Power Initiative Round III projects

Table 6-5: North American Storage Potential, Giga Tons

Table 6-6: CCS Projects for coal and general carbon storage

Table 6-7: Status of UGC development worldwide

Table 6-8: Coal mine methane projects at various stages of development registered on the Globalmethane.org

Table 7-1: Top 22 CO₂ Emitting Countries, Mt of CO₂ Emitted, 2008

Table 8-1: Coal market in China

Table 8-2: Mining consolidation targets in Shanxi

Table 8-3: Status of coal reserves at Shenhua's mines, Mt, 2009

Table 8-4: Breakdown of CSES's coal production by mine, Mt, 2009

Table 8-5: Chinese companies with an export licence by weight, Mt

Table 8-6: Coking coal imports and their source

Table 8-7: China Coal Imports by source, Mt

Table 8-8: Bilateral Coal Trade between China and Other Countries, Mt

Table 8-9: Export Coal Shipments in China, Mt, 2008 to 2009

Table 8-10: China Coal Imports by Province, Mt, 2009

Table 9-1: Recent and proposed environmental developments affecting the coal industry

Table 9-2: Bilateral Coal Trade between the USA and Other Countries, Mt

Table 9-3: Major US underground coal mines, million short tons, 2009

Table 9-4: Major US surface coal mines, million short tons, 2009

Table 9-5: Major US multi-mine production complexes, million short tons, 2009

Table 9-6: Major Coal Company Asset Acquisitions, Sales and Other Activities in the US in 2009 and 2010

Table 9-7: Major US coal producers by production in Million short tons, 2009

Table 9-8: Peabody Energy Corporation's coal mines

Table 9-9: Arch Coal's active mines, end 2009

Table 9-10: Cloud Peak Energy's coal mines

- Table 9-11: Cloud Peak Energy's coal commitments, 2010 – 2014, Mt or US \$
- Table 9-12: Alpha Natural Resources' organic growth opportunities
- Table 9-13: CONSOL's coal commitments, 2010 – 2014, Mt or US \$
- Table: 9-14 CONSOL Energy's mines
- Table 9-15: North American Coal Corporation's active mines
- Table 9-16: Kiewit Mining Group's coal mines
- Table 9-17: Alliance Resource Partner's coal mines and transfer terminals
- Table 9-18: Westmoreland Coal Company's mines in operation
- Table 9-19: Westmoreland power plants
- Table 9-20: US Coal Production and Number of Mines by State and Mine Type, 2009, 2008, thousand short tons
- Table 9-21: Average cost of natural gas delivered to electric generating plants, US \$ per
- Table 9-22: Non-coal electricity mix in the US and change in generation, %
- Table 9-23: Coal-fired power plants commissioned in the US in 2009
- Table 9-24: Utilisation of Port Capacity in the US, Mt
- Table 10-1: Production by Mining Method and State, Mt, 2008 and 2009
- Table 10-2: Australia's Black Coal Exports by Region, Mt, 2008-9
- Table 10-3: The energy content of solid fuels in Australia
- Table 10-4: Identified insitu resources of black coal, Australia
- Table 10-5: Recoverable economic demonstrated resources (EDR) black coal reserves by basin, end 2008
- Table 10-6: Coal projects under construction or committed in Australia
- Table 10-7: Prices of coal produced by Anglo American, US \$ per tonne, 2009
- Table 10-8: Mines owned by BHP Billiton
- Table 10-9: BHP Billiton Mine Production
- Table 10-10: Coal mining operations fully or partly owned by Rio Tinto
- Table 10-11: Rio Tinto's coal mines
- Table 10-12: Xstrata's coal mines in operation, 2009
- Table 10-13: Coal-fired power plants in operation in Australia, 2008
- Table 10-14: Coal-fired power plants proposed in Australia, 2008
- Table 10-15: Australian Port Expansion Plans, Mt
- Table 10-16: Port Capacity and Export Loadings, 2007/2008 and 2008/2009 (Mt)
- Table 11-1: Consumption of Coal by the Domestic Market in South Africa, Mt
- Table 11-2: Status of Eskom's coal-fired power projects as of April 2009
- Table 11-3: Major Producers in South Africa 2009
- Table 11-4: Anglo Operations' coal assets
- Table 11-5: Anglo Operations' coal mining projects in the pipeline
- Table 11-6: Exarro coal mines
- Table 11-7: Companies and their export capacity at the Richards Bay Coal Terminal, 2010

Table 11-8: Exports through South African Ports

Table 12-1: Coke production capacity projections for Poland

Table 12-2: Aid for Polish Coal Mining According to Council Regulation 1407/2002, € millions

Table 12-3: Largest Hard Coal Producers in Poland, Mt

Table 13-1: Major Coal Producers in Russia, Mt

Table 13-2: Production Output from SUEK's mining regions, 2009

Table 13-3: Recent developments in the Russian coal mining sector

Table 13-4: Bilateral Coal Trade between Russia and Other Countries, Mt

Table 13-5: Shipments at Russian Ports

Table 14-1: Projects sanctioned in India under delegated power in the 2008/2009 tax year

Table 14-2: Estimated Coal Resources in India as of April 2009, Mt

Table 14-3: Estimated Types of Coal Resources in India as of April 2009, Mt

Table 14-4: Central Coalfields' projects in the pipeline

Table 14-5: Details of NCL production included in the tenth plan

Table 14-6: Production output from Western Coalfields from 2000 – 2001, Mt

Table 14-7: Neyveli Lignite Corporation's projects in the pipeline

Table 14-8: Indian anti-dumping taxes on imports of Chinese coke, US \$ per tonne

Table 15-1: Canadian coal mine projects mentioned in the Major Projects Management Office's project list

Table 15-2: Canadian coal mines in operation, 2009

Table 15-3: Coal-fired power plants in operation in Canada, April 2010

Table 15-4: Canadian Port Handling Capacities 2009, Mt per annum

Table 16-1: Indonesian mines in operation in 2009

Table 16-2: The largest hard coal producers in Indonesia

Table 16-3: Structure of Indonesia's export capacity, Mt per annum, 2009

Table 16-4: Port throughput in Indonesia, Mt

Table 17-1: UK coal mines in operation or under development, 2009

Table 17-2: Installed FGD capacity in the UK

Table 17-3: Coal-fired power plants in operation in the UK, May 2010

Table 17-4: Details of opencast coal mines granted planning permission in Great Britain during 2009

Table 17-5: Coal Mine Methane Operators' Activities in the UK

Table 17-6: Benefits of exploiting coalbed methane and coal mine methane in the UK

Table 18-1: Exports from Colombian by Company

Table 18-2: Colombian Port Capacity, Mt

Table 18-3: Major mines in operation in Colombia

Table 18-4: Port infrastructure projects under development in Colombia

Table 19-1: Main coal producers in Venezuela, Mt

Table 19-2: Exports of Coal from Venezuelan Ports

Table 21-1: The Global Coal Leaders Reserves, production, imports, exports, consumption, Mt, 2009

Table 21-2: Coal Reserves, Mt, 2009

Table 21-3: Coal Production, Mt, 1981 to 2009

Table 21-4: Coal Consumption, million tonnes of oil equivalent (Mtoe), 1980 to 2009

Figures

Figure 2-1: Primary Energy Consumption by Fuel, Mtoe, 1965 to 2009

Figure 2-2: World Coal Production, Million Tonnes (Mt) of Coal, 1981 to 2009

Figure 2-3: World Coal Demand, Million Tonnes of Oil Equivalent (Mtoe), 1965 to 2009

Figure 2-4: Coal Demand by Country, Mtoe, 1965 to 2009

Figure 2-5: Coal Consumption in the Major Markets, Mtoe 2000 to 2009

Figure 2-6: Expected growth in global coal demand, Mt, 2007 – 2030

Figure 2-7: Hard Coking Coal Demand Growth Index, 2005 base year

Figure 2-8: Coal Production and Consumption by major producers and exporters, 2009, Mtoe

Figure 2-9: Estimates major Hard Coal Exporters and Importers (Mt of coal) 2009

Figure 2-10: Project and actual installed power capacity worldwide by fuel type, GW, 1990 – 2020

Figure 2-11: Number of years when fuel led annual growth

Figure: 2-12 New global coal power plant generation, GW and Mt, 2010

Figure 2-13: Global coal power plant build-out and coal demand, GW and Mt, 2009 - 2014

Figure 2-14: Electricity generation in China and India, TWh, 2006 – 2030

Figure 2-15: Proven Coal Reserves, Bt, end 2009

Figure 2-16: Top twelve countries in terms of coal reserves, Mt, 2009

Figure 3-1: Coal Types

Figure 3-2: Schematic of Coal Rank

Figure 3-3: The Uses of Coal

Figure 4-1: Regional Distribution of Coal Production, Mt

Figure 4-2: World Coal Production by Principal Producing Countries, Mt

Figure 4-3: Global hard coal and brown coal/lignite production, Mt, 2002 to 2009

Figure 4-4: World Steam and Coking Coal Trade, Mt, 1978 to 2009

Figure 4-5: Development of Steam Coal and Coking Coal Trade, Seaborne and Land, Mt, 1975 to 2009

Figure 4-6: Global Flows of Coal Seaborne Trade, Mt, 2009

Figure 4-7: Seaborne trade thermal coal in the Atlantic and Asia Pacific region, Mt, Q1 2009 and Q1 2010

Figure 4-8: Seaborne trade of coking coal, Mt, Q1 2009 and Q1 2010

Figure 4-9: Trends in seaborne trading patterns

Figure 4-10: Projected seaborne coal demand, Mt, 1990 – 2025

Figure 4-11: Seaborne metallurgic coal supply outlook

Figure 4-12: Selected coal prices, 1987 – 2009, US \$ per tonne

Figure 4-13: Average steam coal prices over the past twelve months in the EU, US \$ per tonne

Figure 4-14: Price projections coal in the European market, US \$ per tonne, 2005 - 2012

Figure 4-15: Thermal Coal Prices, US \$ per ton

Figure 4-16: Chinese FOB Coking Coal Prices, US \$ per tonne

Figure 4-17: Oil, gas and coal prices in the US, US \$ per mmBt, 1995 – 2010

Figure 4-18: Steel production, Mt, 1990 – 2009

- Figure 4-19: Steel Consumption per Capita versus Output per Capita
- Figure 4-20: Global Steel Production, Mt, and Metallurgic Coal Pricing, US \$ per tonne, from 2000
- Figure 5-1: Hard Coal (Steam Coal and Coking Coal) Trade, Mt, 2009
- Figure 5-2: Sea Freight Rates for Hard Coal, 2002 to 2010, US \$ per tonne
- Figure 5-3: Monthly Sea Freight Rates for Hard Coal, Jan 2009 to Jun 2010, US \$ per tonne
- Figure 5-4: New build tanker prices, US \$ million
- Figure 5-5: New build and 5-year Asset Values, US \$ million, 2000 – 2010
- Figure 5-6: Baltic Dry Index 2000 to November 2010
- Figure 6-1: Coal-fired Power Plant Efficiencies
- Figure 6-2: Status of gasification worldwide
- Figure 6-3: Geological storage options for CO₂
- Figure 6-4: Global action on carbon capture and storage (CCS)
- Figure 6-5: 2020 CO₂ avoidance costs for power generation technologies from a macroeconomic perspective in € per tonne of CO₂
- Figure 6-6: Comparison of the global status of CCS projects and proposed ideal portfolio of CCS options, 2009
- Figure 6-7: Spending on CCS
- Figure 6-8: COAL21 National Action Plan phases and impact of COAL21 measures on emissions
- Figure 6-9: CCS projects in Australia at various stages of development
- Figure 6-10: National Atlas of Projected Adequate CO₂ Storage Sites
- Figure 6-11: Current CO₂ Capture Projects
- Figure 6-12: The Clean Coal Technology (CCT) Path of Development
- Figure 6-13: Schematic of UCG Extraction
- Figure 6-14: Coal strata and sites where provisional UCG licences have been awarded
- Figure 7-1: Top Eight Carbon Emission Countries, Mt of CO₂, 1980 to 2008
- Figure 7-2: Top Eight Carbon Emission from Coal Countries, Mt of CO₂, 2008
- Figure 7-3: Global Distribution of Carbon Emissions. Difference between Targeted and Projected Emissions 2010 (Mt of CO₂ equivalents)
- Figure 7-4: Carbon Emission of EU-27 countries, Mt, 2008
- Figure 8-1: Total Primary Energy Consumption in China, Million Tonnes Oil Equivalent (Mtoe), 1965 to 2009
- Figure 8-2: Coal Production and Consumption in China, 1965 to 2009
- Figure 8-3: CR China Thermal Coal Price Index and Forecast Range
- Figure 8-4: Coal Reserves, Coalfields and Ports of Shipment in China
- Figure 8-5: Domestic thermal coal trade flow in China
- Figure 8-6: Breakdown of Production by Mine Type in China, 2009
- Figure 8-7: Gasification potential in China
- Figure 8-8: CSEC's average coal sales price, RMB per tonne, 2005 – 2009
- Figure 8-9: Global steel production
- Figure 8-10: Project and actual installed power capacity in China by fuel type, GW, 1990 – 2020

Figure 8-11: Coal-fired Power Generation Capacity under Construction by Country (GW), 2009

Figure 8-12: Forecast of Unit Coal Consumption and Total Coal Demand for Power Generation

Figure 8-13: Imports into China, Mt, from 2002

Figure 8-14: Imported Coal Prices in China, US \$ per tonne, 2005 – April 2010

Figure 8-15: QHD Coal Ceiling Price Relative to Coal Stock, yuan per tonne

Figure 8-16: China's Coal Consumption Forecast, Mt, 2009 – 2015

Figure 8-17: Schematic of China's major coal transportation infrastructure

Figure 8-18: Dry bulk freight rates from FOB ports to Guangzhou (GZO) port in ChinaCoalArb, US \$ per ton, 2007 – 2010

Figure 9-1: Total Primary Energy Consumption in the US, Mtoe, 1965 to 2010

Figure 9-2: Coal Production and Consumption in the US, 1965 to 2009

Figure 9-3: US historical average weekly coal commodity spot prices, US \$ per ton, November 2007 - 2010

Figure 9-4: Key costs for the US, US \$ per ton, 2002 - 2009

Figure 9-5: US imports and exports of coal, thousand tons, 1949 - 2009

Figure 9-6: Cost of imports and exports of US coal, US \$ per ton

Figure 9-7: The Coal Reserves, Coalfields and Ports of Shipments in the US

Figure 9-8: Top ten owners of coal reserves in the US, million tons, 2008 and 2009

Figure 9-9: Coal production east and west of the Mississippi river, million tons, 1949 - 2009

Figure 9-10: Central Appalachian coal production in secular decline

Figure 9-11: Underground and surface coal mining production, million tons, 1949 - 2009

Figure 9-12: Costs of coal by mine type and mine production range in thousand tons, US \$ per ton, 2009

Figure 9-13: Top five owners of large underground and surface coal mines, million short tons, 2009

Figure 9-14: Peabody's pipeline in China

Figure 9-15: Long-Term International Coal Demand

Figure 9-16: History of Alpha Natural Resources

Figure 9-17: Alpha Natural Resources' business unit and mine locations, December 2009

Figure 9-18: Alpha Natural Resources' announced acquisitions targets

Figure 9-19: CONSOL Energy's coal seams

Figure 9-20: Alliance Resource Partners' coal mines and projects

Figure 9-21: Location of US coal-fired power plants under construction

Figure 9-22: Project and actual installed power capacity in the US by fuel type, GW, 1990 – 2020

Figure 9-23 Projected Eastern US Installed Scrubber Capacity, million tons

Figure 9-24: Development of US seaborne imports and exports, Mt, 2002 – 2009

Figure 10-1: Total Primary Energy Consumption in Australia, Million Tonnes Oil Equivalent (Mtoe), 1965 to 2009

Figure 10-2: Coal Production and Consumption in Australia 1965 to 2009

Figure 10-3: Australia's total recoverable resources of black and brown coal at December 2008

Figure 10-4: Coal Reserves, Coalfields and Ports of Shipment in Australia

- Figure 10-5: Seaborne Thermal Coal Supply Curve, Major Suppliers, 2009
- Figure 10-6: Index of real world energy prices, 2007 – 2008
- Figure 10-7: Advanced mineral and energy projects, April 2010
- Figure 10-8: Prices for Australian thermal coal, US \$ per ounce
- Figure 10-9: Prices for Australian metallurgic coal, US \$ per ounce
- Figure 10-10: Global mining and metals industry, 2010
- Figure 10-11: Project and actual installed power capacity in Australia by fuel type, GW, 1990 to 2020
- Figure 10-12: Capesize Freight Rates to ARA, AUS \$ per tonne
- Figure 11-1: Total Primary Energy Consumption in South Africa, Mtoe, 1965 to 2009
- Figure 11-2: Average coal prices in South Africa, R per tonne, 2002 - 2009
- Figure 11-3: Coal Production and Consumption in South Africa, 1965 to 2009
- Figure 11-4: Project and actual installed power capacity in South Africa by fuel type, GW, 1990 – 2020
- Figure 11-5: Coal Reserves, Coalfields and Ports of Shipment in South Africa
- Figure 11-5: Coal Potential in South Africa
- Figure 12-1: Total Primary Energy Consumption in Poland, Mtoe, 1965 to 2009
- Figure 12-2: Coal Production and Consumption in Poland, 1965 to 2009
- Figure 12-3: The right basis, continuous power plant modernisation or renewal
- Figure 12-4: Projected EU energy import dependence
- Figure 12-5: The Coal Reserves, Coalfields and Ports of Shipment in Poland
- Figure 12-6: Project and actual installed power capacity in Poland by fuel type, GW, 1990 – 2020
- Figure 13-1: Total Primary Energy Consumption in Russia, Million Tonnes of Oil Equivalent(Mtoe) 1965 to 2009
- Figure 13-2: Coal Production and Consumption in Russia, 1965 to 2009
- Figure 13-3: Coal Reserves, Coalfields and Ports of Shipment in Russia
- Figure 13-4: Coal Production Breakdown in Russia, 2009
- Figure 13-5: Breakdown of Coal Exports in Russia, 2009
- Figure 13-6: Project and actual installed power capacity in Russia by fuel type, GW, 1990 – 2020
- Figure 14-1: Total Primary Energy Consumption in India, Million Tonnes of Oil Equivalent (Mtoe) 1965 to 2009
- Figure 14-2: Coal Production and Consumption in India, 1965 to 2009
- Figure 14-3: Major Coalfields and Mining Centres in India
- Figure 14-4: Coal Production by Coal India, Mt, fiscal year 2006 to 2010
- Figure 14-5: Coal production from Western Coalfields' coal mines by mine type, thousand tonnes
- Figure 14-6: Project and actual installed power capacity in India by fuel type, GW, 1990 – 2020
- Figure 14-7: Coal-fired power plants in India, 2009 – 2010 fiscal year
- Figure 15-1: Total Primary Energy Consumption in Canada, 1965 to 2009
- Figure 15-2: Coal Production and Consumption in Canada, 1965 to 2009
- Figure 15-3: Total exports and imports of coal by country for Canada, US \$ million, 2009
- Figure 15-4: Gross Domestic Product of the Canadian Coal Mining and Mineral Manufacturing Industry,

US \$ million, 2000 - 2009

Figure 15-5: The Coal Reserves, Coalfields and Ports of Shipment in Canada

Figure 15-6: Canadian Energy Sources

Figure 15-7: Project and actual installed power capacity in Canada by fuel type, GW, 1990 – 2020

Figure 16-1: Total Primary Energy Consumption in Indonesia, Mtoe, 1965 to 2009

Figure 16-2: Coal Production and Consumption in Indonesia, 1965 to 2009

Figure 16-3: The Coal Reserves, Coalfields and Ports of Shipment in Indonesia

Figure 16-4: Bumi Resource's ownership structure

Figure 16-5: Adaro's coal pit to port integration

Figure 16-6: Market for Environmental Coal 'Envirocoal'

Figure 16-7: Project and actual installed power capacity in Indonesia by fuel type, GW, 1990 to 2020

Figure 17-1: Total Primary Energy Consumption in the UK, million tonnes of oil equivalent (Mtoe) 1965 to 2009

Figure 17-2: Coal Production and Consumption in the UK, 1965 to 2009

Figure 17-3: Imports and exports of coal for the UK, thousand tons, 1970 to 2009

Figure 17-4: Reserves of Coal Available for Exploitation by Underground Coal Gasification (UCG)

Figure 17-5: Production of coal from deep-mined and open cast mines in the UK, million tonnes, 1970 to 2009

Figure 17-6: Deep and open cast mines in operation in the UK, fiscal 1974 to 2009

Figure 17-7: Project and actual installed power capacity in the UK by fuel type, GW, 1990 to 2020

Figure 17-8: Options for methane extraction in the UK

Figure 18-1: Total Primary Energy Consumption in Colombia, Million Tonnes of Oil Equivalent (Mtoe), 1965 to 2009

Figure 18-2: Coal Production and Consumption in Colombia, 1965 to 2006

Figure 18-3: The Coal Reserves, Coalfields and Ports of Shipment in Colombia

Figure 18-4: Project and actual installed power capacity in Colombia by fuel type, GW, 1990 to 2020

Figure 18-5: Central Railroad planned in Colombia

Figure 18-6: Central Railroad planned in Colombia

Figure 19-1: Total Primary Energy Consumption in Venezuela, Mtoe, 1965 to 2009

Figure 19-2: Project and actual installed power capacity in Venezuela by fuel type, GW, 1990 to 2020

Figure 19-3: Coal Production and Consumption in Venezuela, 1965 to 2009

Figure 19-4: The Coal Reserves, Coalfields and Ports of Shipment in Venezuela



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