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Update 21

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## Market Overview And Trends

Highlights

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# COAL TRAFFIC AT INDIAN PORTS



## COAL &amp; COKE TRAFFIC AT INDIAN PORTS (QTY IN MILLION TONNES)

PORT NAME	Apr- Sep - 21	Apr- Sep - 20	VARIANCE
BEDI	0.387	0.91	-0.523
BHAVNAGAR	1.019	0.836	0.183
DAHEJ	3.161	2.245	0.916
DHAMRA	9.167	6.497	2.671
DHARAMTAR	1.496	1.028	0.468
ENNORE	10.811	6.774	4.038
GANGAVARAM	8.846	7.143	1.703
GOPALPUR	0.604	0.038	0.567
HALDIA	5.717	5.101	0.615
HAZIRA	6.051	3.508	2.543
JAIGAD	3.375	3.636	-0.261
KAKINADA	0.834	0.814	0.02
KANDLA	5.51	5.552	-0.042
KARAIKAL	1.659	3.549	-1.89
KOLKATA	0.002	0	0.002
KRISHNAPATNAM	13.879	12.336	1.543
MAGDALLA	1.338	1.249	0.089
MANGALORE	2.219	1.41	0.809
MORMUGAO	4.575	4.286	0.289
MUMBAI	1.33	0.728	0.602
MUNDRA	10.888	12.799	-1.911
NAVLAKHI	3.838	2.907	0.931
OKHA	0.462	0.428	0.034
PARADIP	20.241	15.744	4.496
PIPAVAV	0.758	0.694	0.064
PORBANDAR	0.102	0.137	-0.035
SAGAR ROADS	0.267	0.019	0.248
SALAYA	1.053	1.598	-0.545
TUNA	2.964	1.697	1.267
TUTICORIN	6.585	6.696	-0.111
VIJAYDURG	0.139	0	0.139
VISAKHAPATNAM	7.691	5.684	2.007
GRAND TOTAL	136.97	116.192	20.778

## MAJOR COAL &amp; COKE IMPORTERS - OCTOBER 2021 (QTY IN MILLION TONNES)

IMPORTERS	CARGO	QTY
ADANI COAL TRDG. CORPN.	COAL	0.056
	COKING COAL	0.081
	R.P. COKE	0.011
ADANI ENTERPRISES LTD.	COAL	0.497
	NON COKING COAL	0.436
	STEAMING COAL	0.468
ADANI EXPORT LTD.	NON COKING COAL	0.077
ADANI POWER LTD.	STEAMING COAL	0.145
AGARWAL COAL CORPN.	COAL	0.39
	STEAMING COAL	0.086
AGARWAL CORPN. PVT. LTD.	STEAMING COAL	0.055
AGRAKANCHI CEMENT CO.	COAL	0.158
ARCELOR MITTAL NIPPON STEEL INDIA LTD.	ANTHRACITE COAL	0.061
	COAL	0.075
	MET COKE	0.07
	STEAMING COAL	0.077
AT TRADE OVERSEAS PVT. LTD.	COAL	0.059
BENGAL ENERGY CO. LTD.	COKING COAL	0.153
BHUSAN POWER & STEEL LTD.	BLUE WATER COKING	0.078
BHUSHAN POWER AND STEEL LTD.	COKING COAL	0.078
	STEAMING COAL	0.165
CHEMPLAST CUDDALORE VINYLs LTD.	COAL	0.073
CHETTINAD CEMENT CORPN. LTD.	COAL	0.126
DALMIA CEMENTS LTD.	PET COKE	0.055
DHAR COAL LTD.	INDUSTRIAL COAL	0.055
ELECTRO CASTING LTD.	ANTHRACITE COAL	0.01
	COKING COAL	0.027
GANDHAR COAL AND MINERALS	INDUSTRIAL COAL	0.061

	STEAMING COAL	0.073
GLOBAL COAL AND MINING PVT. LTD.	INDUSTRIAL COAL	0.056
GOA CARBON	R.P. COKE	0.009
GREEN GOLD GLOBAL RESOURCES PVT. LTD.	COAL	0.132
GUJARAT HEAVY CHEMICAL LTD.	ANTHRACITE COAL	0.021
HINDALCO INDUSTRIES LTD.	COAL	0.06
IMR METALLURGICAL RESOURCES AG	STEAMING COAL	0.051
IMR RESOURCES	STEAMING COAL	0.055
INDIA COKE AND POWER PVT. LTD.	COAL	0.183
	COKE BREEZE	0.018
	STEAMING COAL	0.154
INDIA COKE PVT. LTD.	COAL	0.207
	COKING COAL	0.058
INTERTEX PVT. LTD.	STEAMING COAL	0.063
JAYASWAL NECO	COKING COAL	0.033
JINDAL STEEL AND POWER LTD.	COKING COAL	0.221
	PCI COAL	0.153
	STEAMING COAL	0.164
JINDAL STEEL WORKS LTD.	COKING COAL	0.696
JSW STEEL LTD.	ANTHRACITE COAL	0.08
	COAL	0.141
	COKING COAL	0.336
	STEAMING COAL	0.295
KALYANI STEEL LTD.	MET COKE	0.022
MAHALAXMI CO. LTD.	STEAMING COAL	0.075
MAHENDRA SPONGE PVT/ LTD.	STEAMING COAL	0.05
NEO CARBONS PVT. LTD.	PET COKE	0.012
NIRMA LTD.	COAL	0.055
OPG POWER GENERATION PVT. LTD.	STEAMING COAL	0.077
RAIN CII CARBON (I) LTD.	PET COKE	0.031
RAMCO CEMENTS LTD.	COAL	0.088

RASHTRIYA CHEMICAL AND FERTILIZER LTD.	COKING COAL	0.083
RASHTRIYA ISPAT NIGAM LTD.	COKING COAL	0.277
	NON COKING COAL	0.131
RAWMET CO.	COKING COAL	0.038
RAWMET COMMODITIES PVT. LTD.	COAL	0.049
	PCI COAL	0.043
RELIANCE INDUS. LTD.	COAL	0.161
	PET COKE	0.078
ROYAL ENERGY LTD.	COAL	0.05
RSPL LTD.	COAL	0.056
SANVIRA INDUS. LTD.,	CALCINED PET COKE	0.042
SARAOGI UDYOG PVT. LTD.	STEAMING COAL	0.031
SAURASTHRA FUELS PVT. LTD.	COKING COAL	0.08
SEMBCORP ENERGY INDIA LTD.	COAL	0.501
	STEAMING COAL	0.073
SHIVAM CEMENTS AND COAL LTD.	COAL	0.029
SRI KALAHASTI PIPES	COAL	0.03
SRL STEEL LTD.	COKING COAL	0.015
STEEL AUTHORITY OF INDIA LTD.	COAL	0.139
	COKING COAL	0.86
	PCI COAL	0.032
SWISS SINGAPORE INDIA PVT. LTD.	COAL	0.127
	STEAMING COAL	0.09
TATA CHEMICALS LTD.	COAL	0.165
TATA INTL. LTD.	COKING COAL	0.044
	STEAMING COAL	0.075
TATA METALLICKS LTD.	ANTHRACITE COAL	0.01
TATA POWER CO. LTD.	COAL	0.113
	STEAMING COAL	0.229
TATA STEEL BSL LTD.	ANTHRACITE COAL	0.078
	COKING COAL	0.294



	PCI COAL	0.05
	STEAMING COAL	0.104
TATA STEEL LONG PRODUCTS LTD.	STEAMING COAL	0.03
TATA STEEL LTD.	ANTHRACITE COAL	0.059
	COKING COAL	0.751
	MET COKE	0.009
	PCI COAL	0.322
	STEAM NON COKING	0.164
TORRENT POWER LTD.	COAL	0.08
TRIDENT CHEMPHAR LTD.	STEAMING COAL	0.061
TURNREST RESOURCES PVT. LTD.	COAL	0.07
UDUPI POWER CORPN. LTD.	STEAMING COAL	0.07
ULTRATECH CEMENT LTD.	COAL	0.124
	NON COKING COAL	0.244
	PET COKE	0.02
	THERMAL COAL	0.161
UTTAM GALVA METALLICS LTD.	COAL	0.033
UTTAM GALVA STEEL LTD.	COAL	0.034
VARIOUS RECEIVERS	STEAMING COAL	0.028
	THERMAL COAL	0.024
VEDANTA ALUMINIUM LTD.	CALCINED PET COKE	0.024
	COAL	0.078
VIMAL COAL PVT. LTD.	LAM COKE	0.017
VISA MINMATE LTD.	COKING COAL	0.056
	MET COKE	0.016
ZUARI CEMENTS LTD.	PET COKE	0.055

## MAJOR COAL &amp; COKE ORIGIN COUNTRY WISE IMPORTS (QTY IN MILLION TONNES)

COUNTRIES	OCT-21	QTY
AUSTRALIA	BLUE WATER COKING COAL	0.078
	COAL	1.032
	COKING COAL	2.878
	PCI COAL	0.477
	STEAMING COAL	0.485
CHINA	CALCINED PET COKE	0.024
	COAL	0.272
	COKING COAL	0.106
	NON COKING COAL	0.19
	PET COKE	0.02
	STEAMING COAL	0.148
EGYPT	ANTHRACITE COAL	0.059
	COKE BREEZE	0.018
	MET COKE	0.009
GIBRALTAR	COAL	0.124
INDONESIA	COAL	2.083
	COKING COAL	0.079
	INDUSTRIAL COAL	0.172
	LAM COKE	0.017
	STEAMING COAL	1.256
JAPAN	MET COKE	0.022
	STEAMING COAL	0.077
MOZAMBIQUE	COKING COAL	0.099
	THERMAL COAL	0.161

RUSSIA	ANTHRACITE COAL	0.259
	MET COKE	0.07
	PCI COAL	0.124
SAUDI ARABIA	PET COKE	0.11
SINGAPORE	R.P. COKE	0.016
SOUTH AFRICA	COAL	0.443
	COKING COAL	0.061
	NON COKING COAL	0.404
	PET COKE	0.078
	STEAM NON COKING COAL	0.164
	STEAMING COAL	0.681
SRI LANKA	MET COKE	0.016
TAIWAN	NON COKING COAL	0.083
THAILAND	STEAMING COAL	0.05
U.A.E.	COKING COAL	0.054
	PET COKE	0.031
UNITED KINGDOM	COKING COAL	0.055
UNITED STATES	CALCINED PET COKE	0.042
	COAL	0.077
	COKING COAL	0.08
	THERMAL COAL	0.024
	COKING COAL	67553
	NON COKING COAL	122850
	PET COKE	27058
	STEAMING COAL	176955
VIETNAM	COAL	60500
VIRGINIA	COKING COAL	30000



# HIGHLIGHTS

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## 01

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India's coal import rises 13% to 107 MT in April-September

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India, Indonesia and Philippines join coal transition programme

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Coal India, other production units set to ramp up output as imports decline



## 04

Substantial Reduction Noted In India's Import of Non Coking Coal

## 05

Coal imports by power units slide to 7 year-low



## India's coal import rises 13% to 107 MT in April-September

India's coal import rose by 12.6% to 107.34 million tonnes in the first six months of 2021-22. - The country had imported 95.30 million tonnes (MT) of the coal in April-September 2020-21, according to provisional data compiled by mjunction services, based on monitoring of vessels' positions and data received from shipping companies. Mjunction – a joint venture between Tata Steel and SAIL--is a B2B e-commerce company and also publishes research reports on coal and steel verticals. However, the country's coal import dropped to 14.85 MT in September, against 19.04 MT in the corresponding month of previous fiscal, it said. "Coal imports in September 2021 were also down by 21.97% over September 2020 when imports stood at 19.04 MT," it

said. "The substantial drop in import volumes in September as compared to the same month last year was in line with expectation, given the steady rise in thermal and coking coal prices in the global market. This trend is likely to continue till there is a significant correction and stability in seaborne prices," Vinaya Varma, MD and CEO, mjunction said. Of the total import in September, non-coking coal was at 9.22 MT, against 11.97 MT imported in September last year. Coking coal import was at 4.27 MT, down from 4.58 MT imported in September 2020. "India's coal and coke imports during September 2021 through the major and non-major ports are estimated to have dropped by 2.4% over August 2021," it said. ■

Source: The Hindu



However, country's coal import dropped to 14.85 MT in September, against 19.04 MT in the corresponding month of previous fiscal



## India, Indonesia and Philippines join coal transition programme

India, Indonesia and the Philippines will join South Africa as the first recipients of a multibillion-dollar pilot programme aimed at accelerating their transition from coal power to clean energy, the Climate Investment Funds (CIF) said on Thursday. The four countries account for 15% of global emissions related to coal, the dirtiest fossil fuel. Cutting their emissions more quickly will help the global effort for net-zero carbon emissions by 2050, a key goal of the ongoing United Nations COP26 in Glasgow, Scotland. Indonesian Energy

Minister Arifin Tasrif said his country was committed to reducing and replacing its coal power plants with renewables in the energy transition. "Climate change is a global challenge that needs to be addressed by all parties through leading by example," he said in a statement. The CIF said the Accelerating Coal Transition (ACT) programme was the first to target developing countries that lack adequate resources to finance the shift away from coal, a move considered vital to limit the global temperature rise to 1.5 degrees Celsius by 2030. ■

The programme was targeted at developing countries that lack adequate resources to finance the shift away from coal

South Africa said on Tuesday it would be the first beneficiary. The new programme has been endorsed by the Group of Seven advanced economies and is supported by financial pledges from the United States, Britain, Germany, Canada, and Denmark, the CIF said. Denmark said it would donate 100 million Danish crowns (\$15.5 million) to the programme's "efforts to purchase and decommission coal power plants and invest in new energy sources". "We must have sustainable plans for decommissioning coal power plants. For example, we need to ensure alternative employment for the local population, including retraining programmes," said Danish Foreign Minister Jeppe Kofod. Coal combustion, the biggest single source of global temperature increase, faces competitive challenges from renewable energy sources. The number of uncompetitive coal plants is expected to grow by over two-

thirds globally by 2025. "Coal is a high-emitting power source at odds with a climate-smart future," said Mafalda Duarte, chief executive of the CIF, which was created by the world's biggest economies in 2008 to help poorer countries accelerate their shift to a low-carbon economy. "Markets are starting to trend in the right direction, but the transition is not happening fast enough to respond to the urgency of the climate crisis," Duarte said. It will invest in projects ranging from bolstering countries' domestic capacity to manage energy transitions to repurposing or decommissioning coal assets, and creating economic opportunities for coal-dependent communities. The project will work with six multilateral development banks to offer coal-transitioning countries a comprehensive financial toolkit including low-income loans and technical assistance.

Source: The Hindu Business Line



### Coal India, other production units set to ramp up output as imports decline

Coal India and other coal producing units are all set up to ramp up domestic production as the country has reduced its dependence on imports for non-coking coal. The Coal Ministry said in a statement on Tuesday that although coking coal is non-substitutable, India has substantially reduced the imports of various grades non-coking coal during the current financial year. The country has reduced imports of high gross calorific value (GCV) thermal coal meant for industrial purposes and low GCV coal for power generation,

the ministry added. "In the first five months of the financial year 2021-22, i.e. up to August 2021, the import of all varieties of non-coking coal has reduced to 70.85 MT from 84.44 MT during the corresponding months of the financial year 2019-20, representing a decline of about 16.09 per cent," the ministry said. Coal Ministry said it has not taken financial year 2020-21 for comparison purpose due to industrial production getting severely affected during this year because of Covid-19 related restrictions where the decline

The country has reduced imports of high gross calorific value (GCV) thermal coal meant for industrial purposes and low GCV coal for power generation, the Coal Ministry said

observed is 21 per cent. The reduction of imports of low GCV of non-coking coal, which is mainly used in power sector, is even more significant, the ministry stated. During FY 2021-22, up to August 2021, the imports of such grades of coal have decreased by about 47 per cent to 15.24 MT from 28.69 MT during the same period of FY 2019-20, it added. This substantial reduction in import of non-coking coal in the current year has led to the overall import of coal being reduced to 94.15 MT in the period between April and August this year. It stood at 107.01 MT during the corresponding period of FY 2019-20, a decrease of about 12 per cent. This has resulted in considerable financial savings in the

current year as coal prices are going up sharply in the international market, the Coal Ministry said. Meanwhile, the total domestic dispatch of coal has gone up by 9.44 per cent to 317.69 MT in the current fiscal up to August, as compared to 290.28 MT in the same period of FY 2019-20. The ministry said this increase was achieved despite serious challenges arising out of unprecedented rain in several mine areas this year. "The government is continuing all efforts to further enhance the coal production and dispatch. Coal India Limited and other Coal producing Units are all set to ramp up the domestic production," it further said.

Source: Livemint



### Substantial Reduction Noted In India's Import of Non Coking Coal

The import of all varieties of Non Coking Coal has reduced to 70.85 MT from 84.44 MT during the corresponding months of the financial year 2019-20 representing a decline of about 16.09%

India has been importing coal to bridge the gap between the requirement of coal and the domestic production in the country. The dependence on imports for Coking Coal mainly used in the steel sector has been predominantly due to very limited domestic availability. Thus, import under this category has been largely non-substitutable. Even though the import of Coking Coal is non-substitutable, consequent to the sustained effort of the government, in line with mission 'AtmaNirbhar', the imports of various grades of Non Coking Coal have reduced substantially during the current financial year. The latter includes high GCV thermal coal used for industrial

purpose and low GCV that goes for power generation. In the first five months of the Financial Year 2021-22 i.e. up to August 2021 (Firm import data is available up to August, 21), the import of all varieties of Non Coking Coal has reduced to 70.85 MT from 84.44 MT during the corresponding months of the financial year 2019-20 representing a decline of about 16.09%. The financial year 2020-21 is not being taken for comparison purpose due to industrial production getting severely affected during this year because of Covid-19 related restrictions where the decline observed is 21%.

Source: Business Standard



## Coal imports by power units slide to 7 year-low

Price drives trend, exacerbates deficit

Indian utilities' coal imports fell more than 73% in September to their lowest in more than seven years due to high prices, government data showed, despite a call by the Centre to boost shipments to arrest a crippling coal shortage. Imports by utilities fell to 1.08 million tonnes in September, compared with 4.03 million tonnes a year earlier and 5.23 million tonnes in September 2019. India had urged utilities to import coal in late August as coal-fired electricity generation surged after coronavirus-related curbs were eased, with several power plants being pushed to the verge of running out of fuel. However, data from the Central Electricity Authority showed State government-run coastal power plants dependent on imported coal had cut supplies as global prices surged, increasing pressure on Coal India to produce more. Almost three-fifths of India's coal-fired capacities currently have coal inventories that would last three days or less, data showed. Imports of liquefied natural gas (LNG) by utilities during the

September quarter also slumped 36%, the data showed, hitting their lowest levels in three years. The drop represented the steepest monthly decline in at least three and a half years. Coal imports by power plants fell 55% during the quarter, making it the biggest fall in at least six and a half years. Overall gas consumption by utilities fell by about a fifth during the quarter, with power plants increasing reliance on long-term contracts with global and domestic firms, and cut down on spot buying as prices surged, the data showed. India mainly imports natural gas from Qatar, while Indonesia, Australia and South Africa are key suppliers of coal to the world's second-largest importer of the fuel. Imports of coal could, however, rise in the coming months as state-run NTPC Ltd has issued a tender to import 2 million tonnes of coal, nearly double the quantity it has imported so far this year. It was not immediately clear when the coal would be delivered. ■

Source: Outlook

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