



August 2020




Category – Market Research

Determining Business Case in Coal Import Market Post the Outbreak of Covid-19 Pandemic in India

Coal Imports Market Monitor in India 2020

Coverage >


 Global Coal Import Market with India Context

 Weak coal demand amidst the Covid-19 but coal import to pick up pace in near future

 Business Case for Coal Import Market in India

 Coal Import Market in India - Report Insights

 Coal Import Market in India – Key Highlights

 Coal Import Market in India – Key Queries Addressed

Report Rationale




Make In India initiative shall see huge push to energy requirements and being coal dependent the country shall need inputs from imports given the growth in power demand in the future.



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Eninrac reports are a combination of logical thinking and analysis on industry issues that matter the most and assist our clients to stay ahead of the market happenings.

 **Value Augmentation**

The Coal Import report deep dives to identify coal pricing dynamics for both domestic & imported coal and determine how market will evolve after the Covid-19 pandemic comes to an end

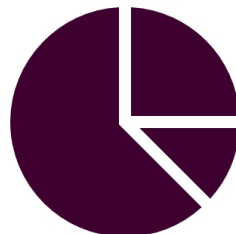


Global Coal Import Market with India Context – An Overview

India is the world's second largest importer of thermal coal, and has the potential to be an on-going source of demand growth — a bright light for thermal coal exporters confronted with falling demand in Europe, North America and North East Asia. But while India is one of the great hopes for thermal coal exporters. India's thermal coal consumption is likely to continue to increase next decade, and possibly beyond, in order to meet India's increasing energy requirements.

Imports declined for a couple of years beginning 2013–14, due to government efforts to boost production combined with slowing industrial production growth. . However imports bounced back in the subsequent years, as power demand rebounded. India now relies on imports for around a fifth of its thermal coal consumption. Despite the on-going government target of self-sufficiency, the power and industrial sectors have had to source thermal coal from the seaborne market, with domestic production and infrastructure capacity failing to keep pace with consumption.

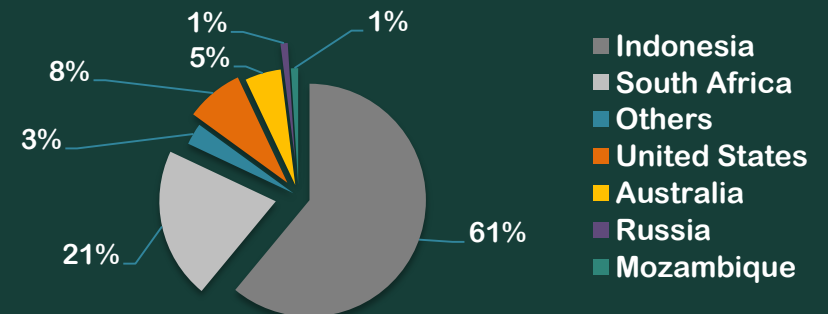
61% of the total thermal coal are imported from Indonesia due to the relatively low cost of Indonesian Coal



Detailed map of the major coal sourcing countries with the type of coal to India

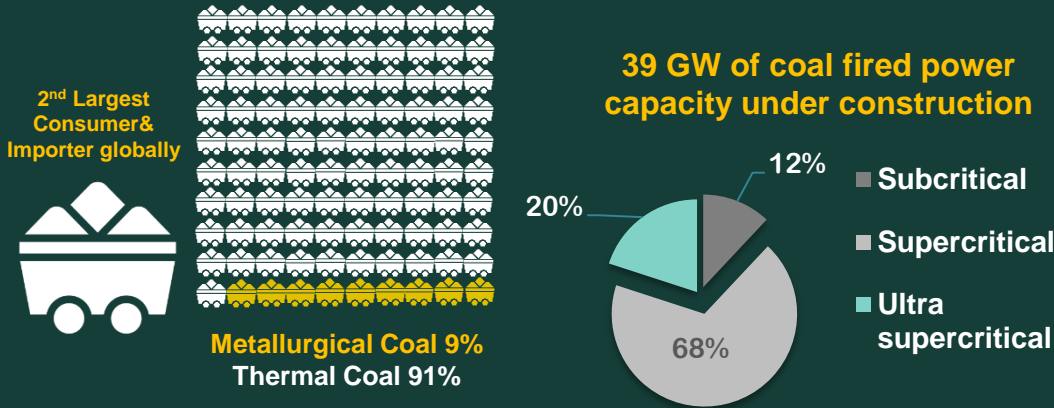


Share of Non-coking Coal Imports in India (%age)

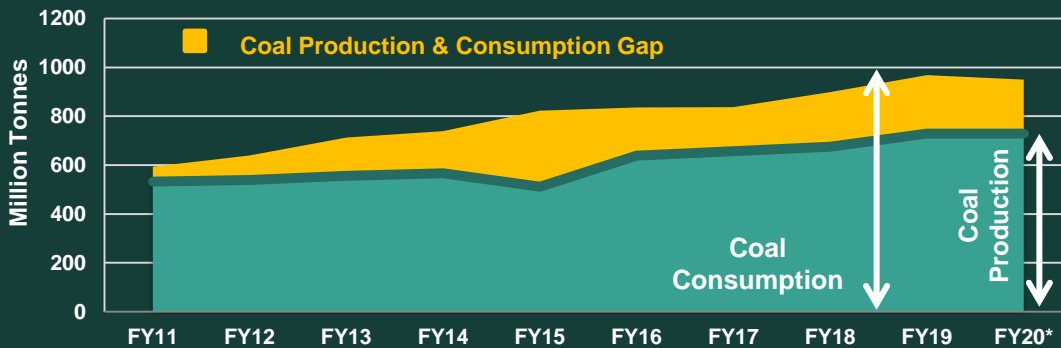


Source: Eninrac consulting and Channel checks

India's thermal consumption is set to increase over the next decade and beyond



India's coal output hasn't kept up with its consumption over past decade



For Australia — the world's largest metallurgical coal producer and the supplier of **over 70 per cent of India's metallurgical coal imports** — growing Indian demand will continue to represent a major opportunity.

Weak coal demand amidst the Covid-19 but coal import to pick up pace in near future

The lockdown imposed across the countries due to novel coronavirus pandemic has had a cascading effect on this sector. There was a significant drop in India's coal import volumes due to both demand and supply side factors, i.e. offtake, consumption, logistics and dispatches. India's coal import in Q1 2020 down 20% over last year, due to restrictions imposed at various ports in the wake of coronavirus outbreak in India. However, as the restrictions eased out, the demand of imported coal shall pick up the pace in later half of the year 2020.

Moreover, the Government has also continued to push forward with the Make in India program— an initiative designed to transform India into a global manufacturing hub. The growth in India's manufacturing and industrial sectors will be a key contributor to rising energy demand in the country. Also, post pandemic Covid-19, India shall to improve the local manufacturing hug to reduce the global supply chain leading the demand for the coal shall increase by the industries.

By the medium of this report eninrac team attempts to assess the impact of global health crisis on Indian Coal import market in India. The report will assess demand outlook of Imported Steam Coal in India by Tracking Upcoming Movements Till 2025. The report shall also Evaluate Major Destinations for Imported Coal along with Price Dynamics for Domestic and Imported Coal. The report shall also evaluate Logistics and Price Benchmarks for Domestic and Imported Coals



BUSINESS CASE FOR COAL IMPORT MARKET IN INDIA

- Promising economic and industrial growth of the country driving massive energy and infrastructure demand
- India's imports lift rapidly on the back of strong growth in energy demand, challenges integrating renewable generation into the electricity grid, and barriers to increasing domestic coal production.
- Only super critical thermal power capacity addition after 2017
- Greater interaction between the Indian and Global coal markets
- Paris Climate change pledges to reduce CO2 emissions
- Smart cities and smart grid is promoted which are both the right enablers for developing a robust EV Market growth in India
- Changing charging infrastructure industry structure in India with many global majors planning to enter the market which shall open up scores of opportunity for value chain players with increasing FDI



REPORT INSIGHTS

- Examining case for coal import in India with factored growth trends for coal import in India
- Examination of Coal Demand & coal import Outlook in MTs by Industry
- Assessing Domestic Coal Demand – Supply Gap and Outlook – Opportunity for import of coal in India
- Evaluating Imported Coal Market in India by type of coal
- Assessment of demand outlook of Imported Steam Coal in India – Tracking Upcoming Movements Till 2025
- Assessment of supply outlook of Imported Steam Coal in India – Tracking Upcoming Movements Till 2025
- Evaluating Major Destinations for Imported Coal
- Assessment of price dynamics for Imported Coal
- Evaluating Logistics and Price Benchmarks for Domestic and Imported Coal



Augmenting Value to Your Business



KEY HIGHLIGHTS

- Current Status of Coal Import in India & its Global Ranking
- Coal Category Wise Coal import in India
- YoY Metallurgical Coal import in India – Tracking Historic Trends
- YoY Steam Coal import in India – Tracking Historic Trends
- Coal Demand drivers in India
- Coal Imports Outlook for India
- Evaluation of Major Coal sourcing countries along with price index
- Price Dynamics for Imported Coal
- Evaluating Logistics and Price Benchmarking



KEY QUERIES ADDRESSED

- What is the likely impact on coal imports with govt. focusing more on boosting domestic production?
- Which coal rich country may become India's next import destination?
- What will be the regulatory and policy outlook for imported coal in India?
- What will be the Demand – Supply dynamics of coking/non coking coal by 2022?
- What will be the imported coking/non coking coal dynamics of India by 2022?
- How renewable capacity addition going to impact coal production?
- What is the future role of India in global coal trade?
- Could India significantly reduce its coal imports and under what conditions?
- What will be the fate of Coal industry in near future?



MUST BUY FOR

- Power Generating Companies
- Steel & Iron Ore Producers
- Cement Producers
- Coal Mining Companies (CIL and Subsidiaries)
- International Coal Mining Companies
- Logistics Companies
- Captive Coal Mining Operators
- Coal Traders
- FIIs/Banks
- Government Agencies



COMPANNIES MENTIONED

- Coal India Limited
- Eastern Coalfields Limited (ECL)
- Bharat Coking Coal Limited (BCCL)
- Central Coalfields Limited (CCL)
- Western Coalfields Limited (WCL)
- South Eastern Coalfields Limited (SECL)
- Northern Coalfields Limited (NCL)
- Mahanadi Coalfields Limited (MCL)
- Agarwal Coal Corporation
- Adani Enterprises Ltd
- Gujarat Nre Coke Ltd
- Anmol India Limited
- Natioanal Thermal Power Corporation
- Jindal Steel and Power
- Essel Infra
- Tata Steel
- Gujarat Mineral Development Corporation
- Odisha Coal and Power Limited
- Bgr Mining & Infra Private Limited



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CONTENTS & COVERAGE

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- Evaluating Imported Coal Market in India by type of coal
- Demand Outlook of Imported Steam Coal in India – Tracking Upcoming Movements Till 2022
- Supply Outlook of Imported Steam Coal in India – Tracking Upcoming Movements Till 2022
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The life of a man consists not in seeing visions and in dreaming dreams, but in active charity and in willing service

- Henry Wadsworth Longfellow

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