



Coal Supply Service

Maximise your investments with our analysis of costs, reserves, production, infrastructure, coal quality and mine valuations.

Life of mine costings, production and reserves for **over 1,100 assets updated annually**

190+ greenfield projects

Covering **10 geographical regions**: Australasia, Canada, Latin America, North East Asia, Russia, South East Asia, Southern Africa, US Appalachia, US Illinois, and US Western

Delivered as **asset reports, country summaries and data** via the Coal Supply Data Tool and Coal Cost Curves

Coverage includes costs, operating margins, production, reserves, quality, productivity and capital expenditures

Cost curves by mine with categories by country, company, product, product sub-type, volatile type and end-market

30+ year
Long-term forecasts

Economic assumptions and prices
updated quarterly

Use it to:



Understand future supply trends from the mine through to refinery level



Develop detailed coal supply and demand forecasts for strategy and budget planning



Use the global supply and demand dynamics for benchmarking projects



Evaluate new growth opportunities in coal supply



Analyse drivers of basis differentials or market prices in local markets



Explore underlying supply trends, costs and implications on local and regional coal markets



Coal Market Service

Further your strategic planning with our **in-depth analysis and forecasts** of coal market fundamentals at the global and regional level.

20+ year **long-term forecasts**
for supply, demand & price – updated bi-annually:

2x Strategic Planning Outlook to **2050**

2x Investment Outlook to **2050**

2700 ocean freight rate
route forecasts

102 country supply-
demand balances

High/low price cases

18-24
month short-term supply,
demand & price forecasts

Coverage: Seaborne trade –
thermal and metallurgical;
Regional – China, India &
North America

21 Metallurgical
price coverage

17 Thermal seaborne
price coverage

Use it to:



Analyse supply, demand and price fundamentals by coal type, within and between markets



Understand market dynamics including revenue and demand potential for different coals



Present market demand and supply views to assist with business planning



Identify shifts in trade patterns and potential implications for regional and global coal markets



Estimate how future coal trade flows and prices unfold on the basis of fundamental supply and demand conditions



Analyse demand, supply and price issues on a global and country level



Thermal Coal Market Service

Further your strategic planning with our **in-depth analysis and forecasts** of thermal coal market fundamentals at the global and regional level.

20+ year long-term forecasts for supply, demand & price – updated bi-annually

18-24 month short-term supply, demand & price forecasts

102 country supply-demand balances

High/low price cases

Coverage: Thermal seaborne trade; Regional – China, India & North America

2700 ocean freight rate route forecasts

21 seaborne price coverage (metallurgical, FOB & CFR)

Use it to:



Analyse supply, demand and price fundamentals by coal type, within and between markets



Identify shifts in trade patterns and potential implications for regional and global coal markets



Understand market dynamics including revenue and demand potential for different coals



Estimate how future coal trade flows and prices unfold on the basis of fundamental supply and demand conditions



Present market demand and supply views to assist with business planning



Analyse demand, supply and price issues on a global and country level



Met Coal Market Service

Further your strategic planning with our **in-depth analysis and forecasts** of metallurgical coal market fundamentals at the global and regional level.

20+ year long-term forecasts for supply, demand & price – updated bi-annually

18-24 month short-term supply, demand & price forecasts

102 country supply-demand balances

High/low price cases

Coverage: Metallurgical seaborne trade; Regional – China, India & North America

2700 ocean freight rate route forecasts

21 seaborne price coverage (metallurgical, FOB & CFR)

Use it to:



Analyse supply, demand and price fundamentals by coal type, within and between markets



Identify shifts in trade patterns and potential implications for regional and global coal markets



Understand market dynamics including revenue and demand potential for different coals



Estimate how future coal trade flows and prices unfold on the basis of fundamental supply and demand conditions



Present market demand and supply views to assist with business planning



Analyse demand, supply and price issues on a global and country level



India Coal Market Service

Further your strategic planning with our **in-depth analysis and forecasts** of coal market fundamentals in India.

**20+
year**

long-term forecasts
for supply, demand &
price – updated
bi-annually

18-24

month short-term supply,
demand, spot price &
stockpiles

>40

Captive mining
companies

76

Coke ovens
and projects

Transport network

detailed information on
capacity and upcoming
projects

Detailed production by company and region

>850

coal-fired power
plants and projects

>80

Listed blast furnace plants
and projects with capacity
forecast for each

Use it to:



Analyse supply
demand and price
fundamentals by
coal type, within and
between markets



Identify shifts in trade
patterns and
potential implications
for India's coal
markets



Understand market
dynamics including
revenue and
demand potential
for different coals



Analyse demand,
supply and price
issues on a national
and regional level



Present market
demand and supply
views to assist with
business planning



Analyse demand,
supply and price
issues in India

China Coal Market Service

Further your strategic planning with our **in-depth analysis and forecasts** of coal market fundamentals in China.

20+ year long-term forecasts for supply, demand & price – updated bi-annually

18-24 month short-term supply, demand, spot price & stockpiles

5 Regional level supply/demand balances

Coal-fired capacity by region

Intracountry trade flows

Detailed production by region

>740 coal-fired power plants and projects

>170 Steel mills detailed information on large- to mid-sized plants

Use it to:



Analyse supply demand and price fundamentals by coal type, within and between markets



Identify shifts in trade patterns and potential implications for China's coal markets



Understand market dynamics including revenue and demand potential for different coals



Analyse demand, supply and price issues on a national and regional level



Present market demand and supply views to assist with business planning



Analyse demand, supply and price issues in China

North America Coal Market Service

Further your strategic planning with our **in-depth analysis and forecasts** of coal market fundamentals in North America.

20+ year long-term forecasts for supply, demand & price – updated bi-annually

18-24 month short-term supply, demand, spot price & stockpiles

Transportation rate forecasts between coal plants and coal regions

Export netback analysis and projections

73 Coal type price forecasts (20-years)

Coal/gas displacement analysis

>500 Individual coal-fired unit forecasts for coal-type demand, operation costs, equipment additions, retirements and more

Use it to:



Analyse supply demand and price fundamentals by coal type, within and between markets



Identify shifts in unit level buying patterns and potential implications for regional coal markets



Understand market dynamics including revenue and demand potential for different coals



Analyse demand, supply and price issues on a national and regional level



Present market demand and supply views to assist with Integrated Resource Planning (IRP)



Determine the impact of current and anticipated environmental regulations on coal and gas demand and new plant development