

5th European Coal Day

17th November 2014

Brussels

Dr Erich Schmitz

Verein der Kohlenimporteure e.V.

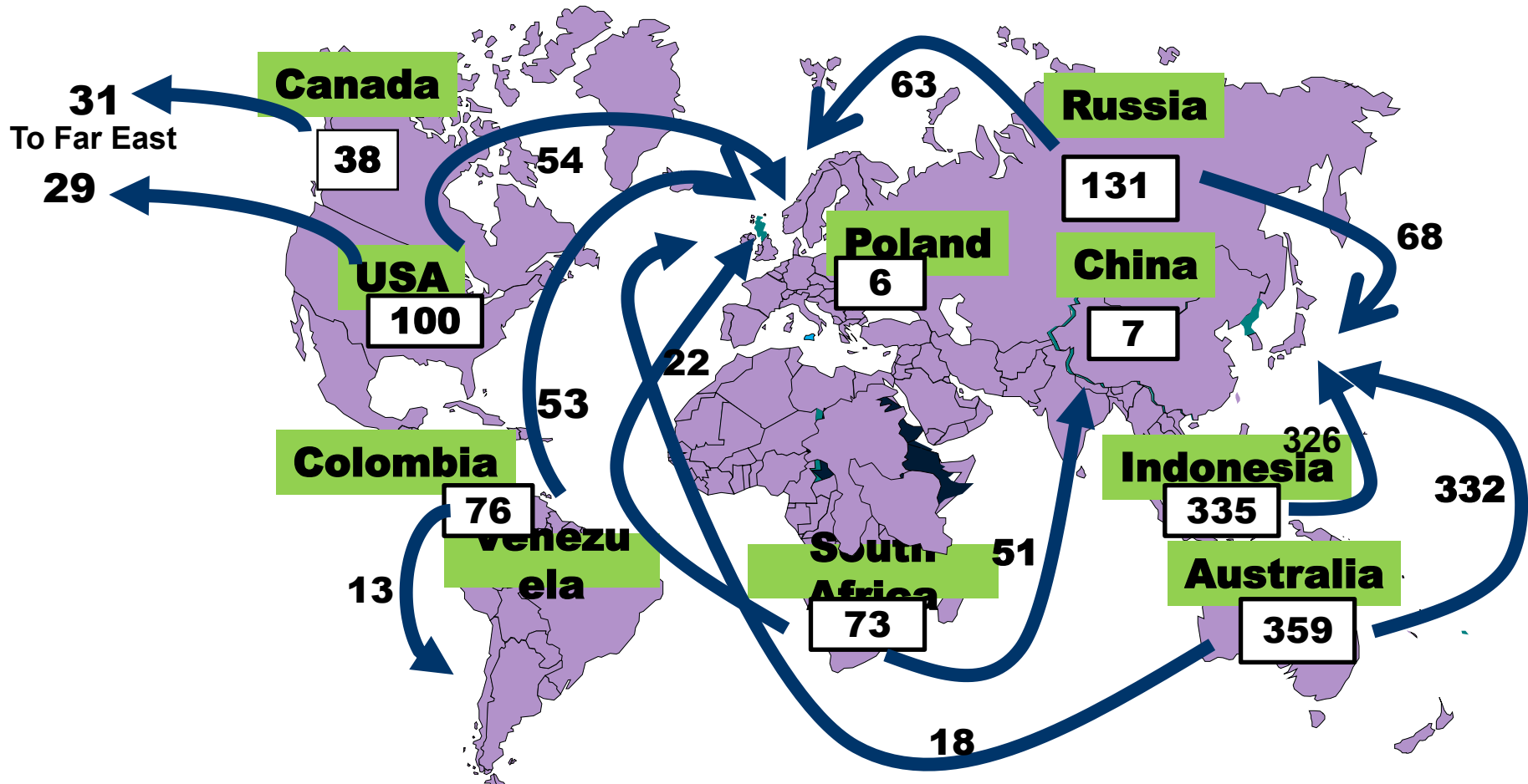
Types of coal

Coal Types and Peat				
UN-ECE	USA (ASTM)	Germany (DIN)		
Peat	Peat	Torf		
Ortho-Lignite	Lignite	WEICHBRAUNKOHLE		
Meta-Lignite		Mattbraunkohle	HARTKOHLE	
Subbitum. Coal	Sub-bituminous Coal	Glanzbraunkohle		
Bituminous Coal		High Volatile Bituminous Coal		Flammkohle
	Gasflammkohle			
	Gaskohle			
	Medium Vol. Bitumin. Coal	Fettkohle		
	Low Vol. Bitumin. Coal	Eßkohle		
Anthracite	Semi-Anthracite	Magerkohle		
	Anthracite	Anthrazit		

Anthracite is a low-vol (< 10%), high fixed-carbon (>80%) coal, with low ash content and a high calorific value (27MJ/kg).



Main trade flows in seaborne hard coal trade 2013 in mn M t



Seaborne trade: 1,142 mn M T
thereof 863 mn MT steam coal,
279 mn MT coking coal

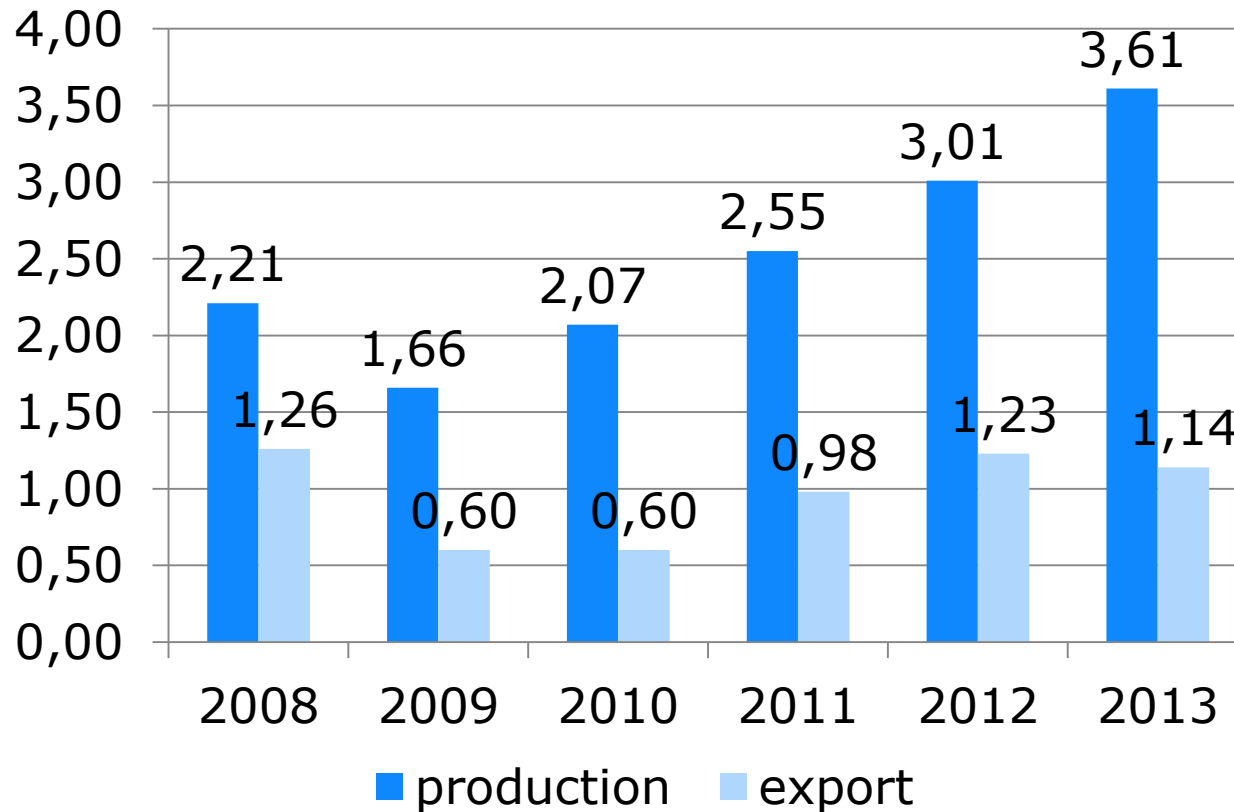
Global hard coal production: 7.2 bn t

World Anthracite Demand Million tonnes

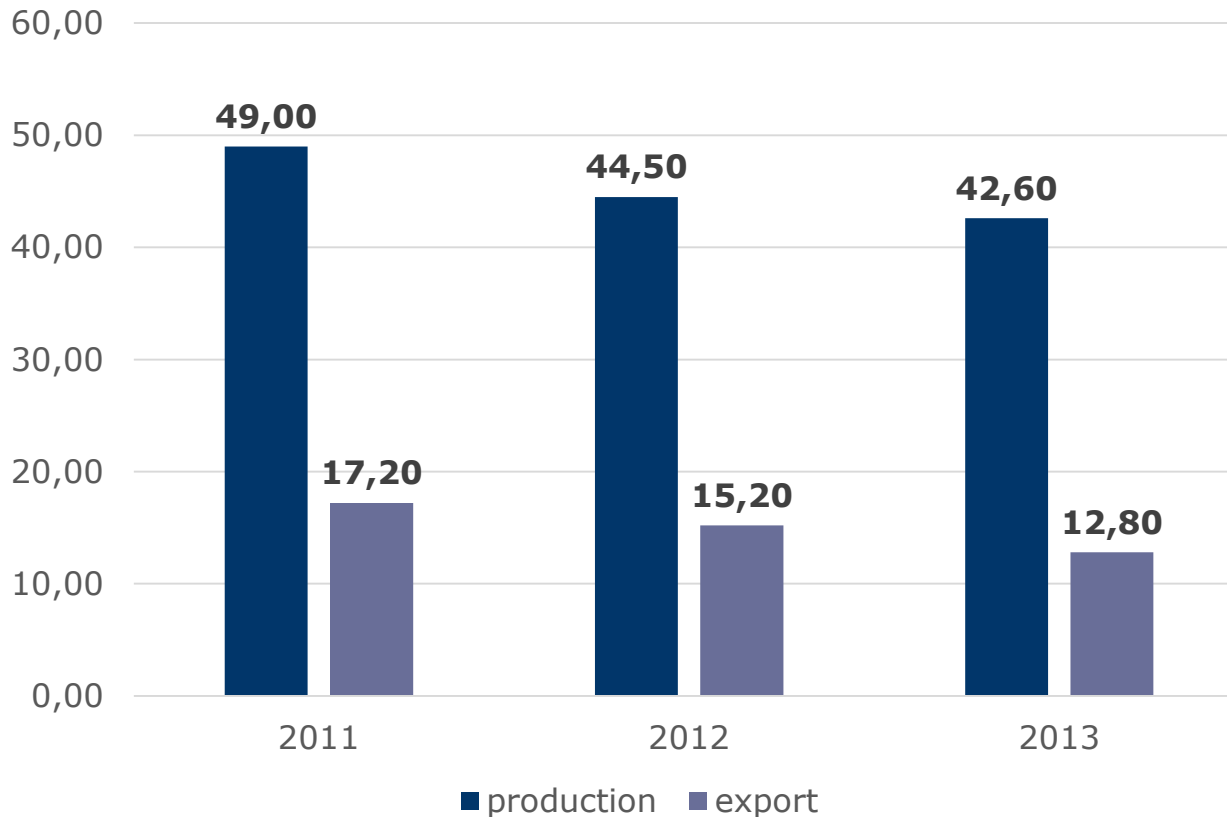
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	<i>% Avge Ann Ch</i>
Europe	19.67	19.46	19.07	22.29	22.22	18.87	19.36	17.79	16.32	13.00	-3.2%
CIS	17.28	18.95	19.49	15.90	13.82	13.50	9.50	12.51	14.95	15.48	-3.9%
North America	2.18	1.85	1.69	1.88	1.86	1.91	1.81	2.43	2.49	1.94	1.8%
Latin America	1.65	1.62	1.53	1.53	1.58	0.83	1.39	2.06	1.51	1.50	-0.3%
Sub-Saharan Africa	0.85	1.08	1.37	1.46	1.48	1.42	1.33	1.59	1.87	2.10	7.3%
Maghreb & Middle East	0.42	0.46	0.64	0.68	0.92	0.51	1.16	1.19	1.22	0.96	10.4%
Asia	79.45	87.84	98.90	109.95	109.72	126.12	130.66	154.59	158.71	162.60	8.0%
Australia	0.09	0.17	0.11	0.11	0.12	0.07	0.08	0.15	0.04	0.04	-7.7%
Total	121.57	131.42	142.80	153.81	151.71	163.22	165.30	192.31	197.11	197.63	5.4%

Source: Resource-Net, August 2014

South Africa: Anthracite coal production and exports in m T

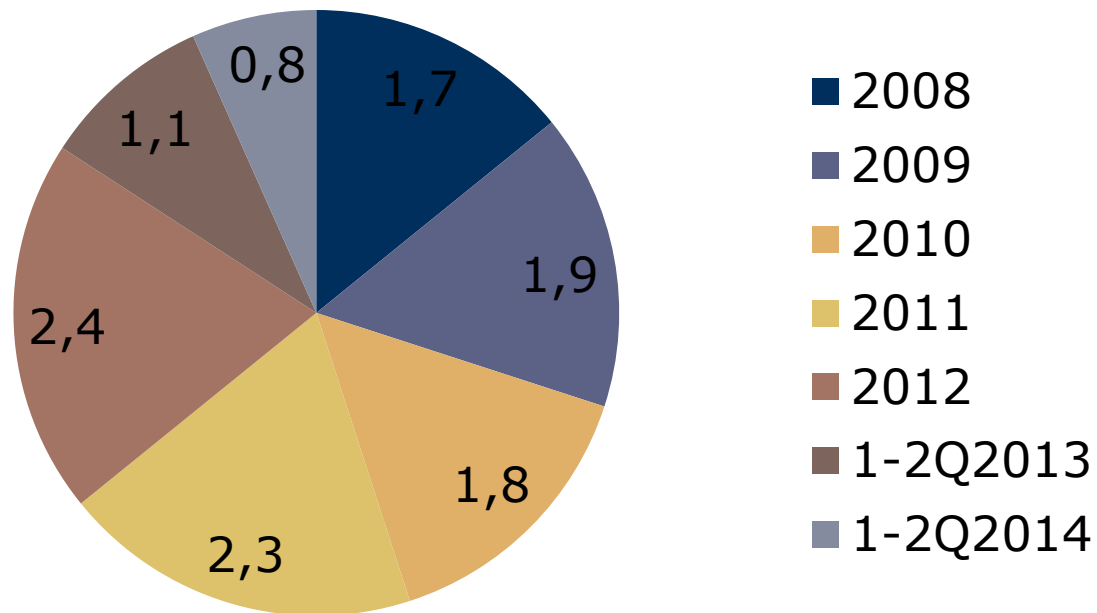


Vietnam: Steam and Anthracite coal production and exports in m T



USA: Anthracite coal production

m ST

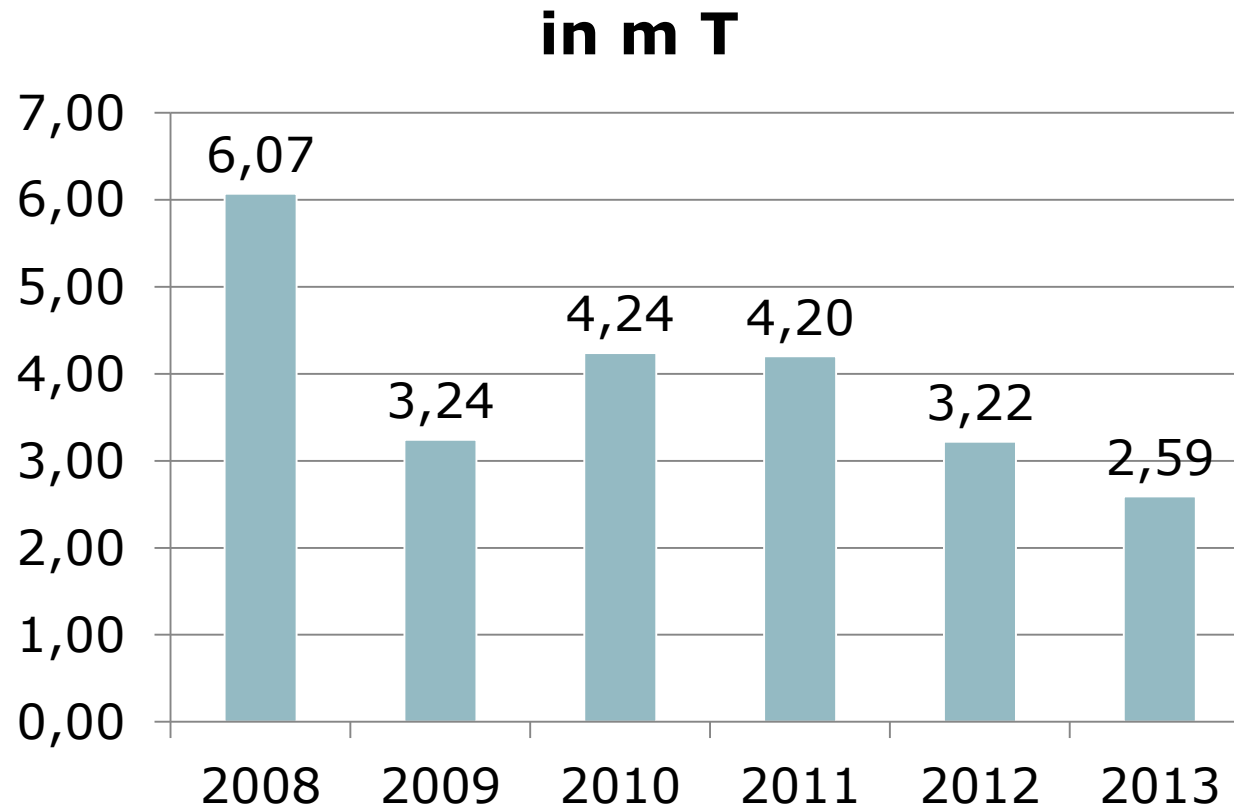


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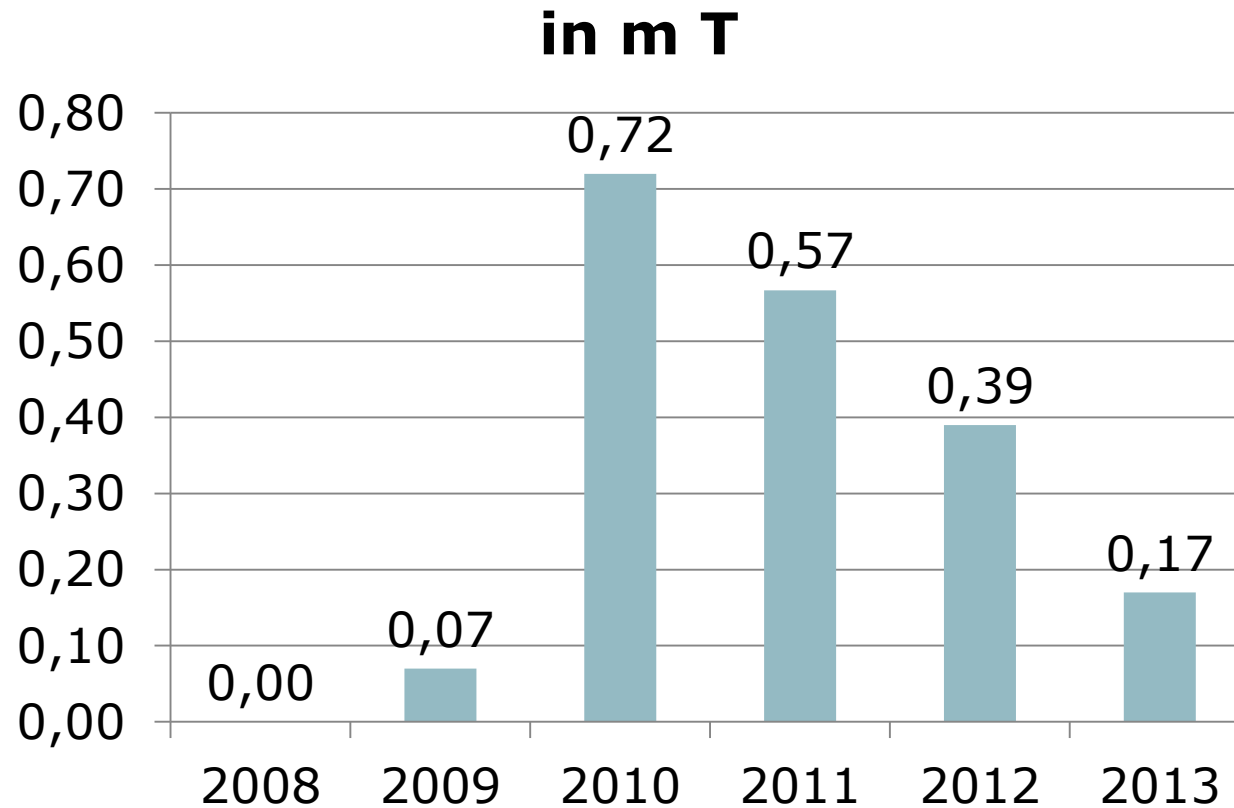
Anthracite capacity of mines at end of 2013

		M tpy
<u>North America</u>		
Mexico		
Carbones DC, other	Sonora	0.07
United States		
Atlantic Coal	Stockton, PA	0.20
Blaschak Coal Corp	Mahanoy City, PA	0.40
Jeddo Coal Company	Hazleton, PA	0.30
Lehigh Anthracite	Tamaqua, PA	0.30
Reading Anthracite Company	Pottsville, PA	0.55
Other	Pennsylvania	0.75
<u>Latin America</u>		
Peru		
Black Hill Company	Chimu	0.10
Sudamericana de Carbon	Oyon	0.05
<u>Sub-Saharan Africa</u>		
South Africa		
Jindal Africa	Kiepersol, Mpumalanga	0.80
Leeuw Mining (Keaton Energy)	Vaalkrantz, KZN	0.35
Petra Mining (Petmin)	Somkhele, KZN	1.20
Sentula Mining	Nkomati, KZN	0.30
Shanduka Coal	Springlake, KZN	0.80
Slater Coal (Buffalo Coal)	Aviemore, KZN	0.30
Zululand Anthracite Colliery	Kwa-Sheleza / Deep E, KZN	0.80
Swaziland		
Maloma		0.20

China: Anthracite coal exports



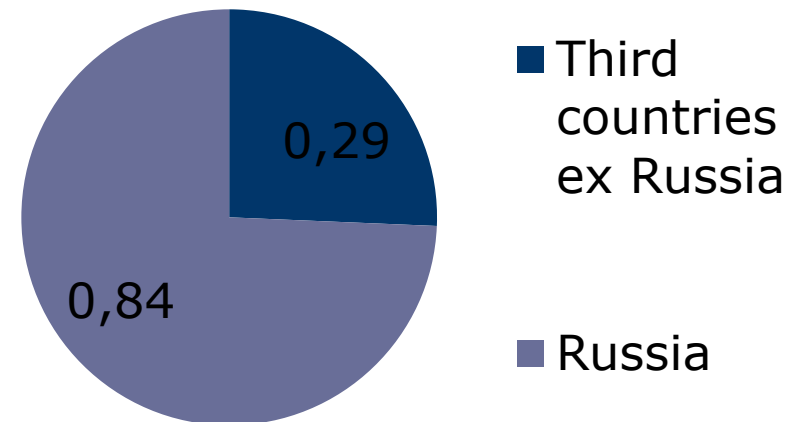
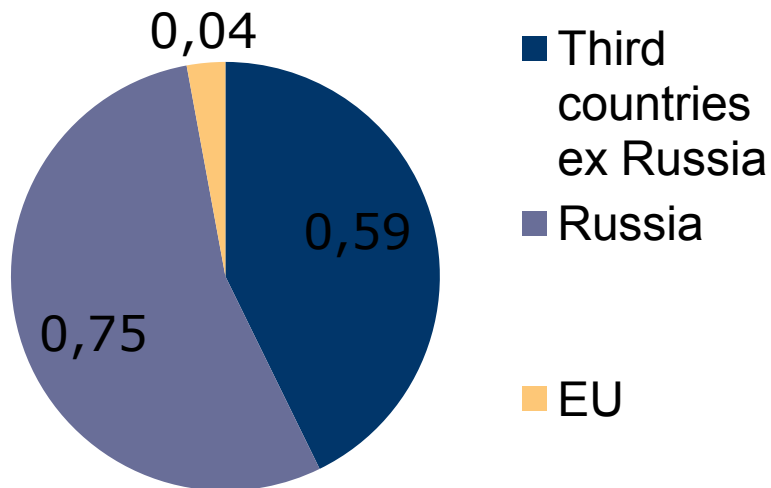
Australia: Anthracite coal exports



Germany: Anthracite coal imports

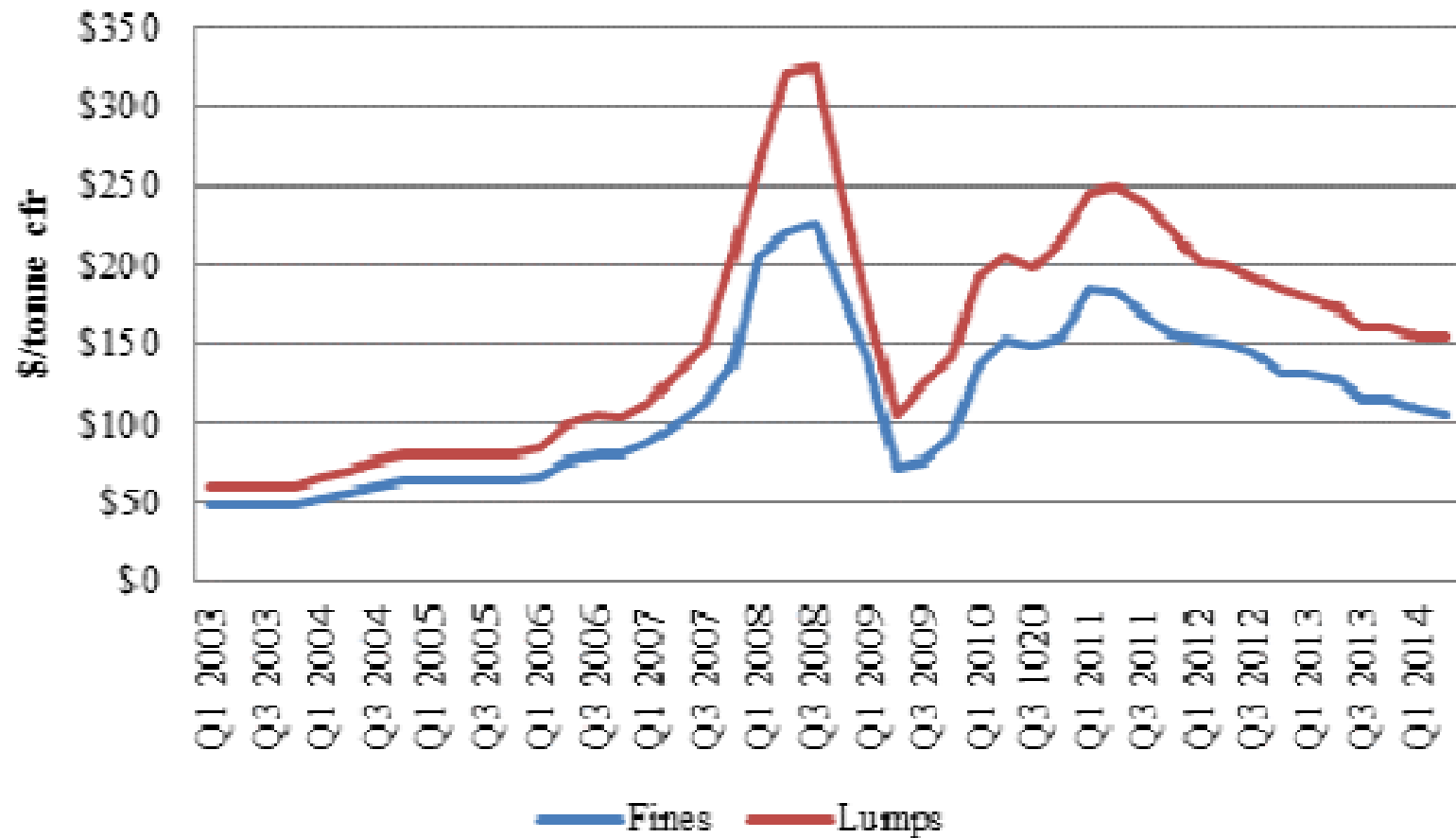
2013 = 1.38 m T

1-8/2014 = 1.14 m T



(EU = 0,014 m T)

European Anthracite Prices



Anthracite market in the Ukraine 2013

- 15.5 mio t production of anthracite
- Mainly extracted in the Donbass region of Eastern Ukraine (Donets and Lugansk)
- 7 major anthracite mines, of which Rovenki and Sverdlov are by far the largest. Combined, they account for 70% of the total Ukraine's anthracite production. They are operated by DTEK under a concession agreement with the government.