Issue 1 2025

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coal

Coal Surges Ahead

Fresh Perspectives on Energy Innovation, American Resilience and Coal's Global Future



The Anthracite Advantage

Fueling the Future With the Purest Form of Coal

Power Play

The Synergies Between Coal and Uranium Make for an Ideal Integrated Energy Mode

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It's a Matter of National Security

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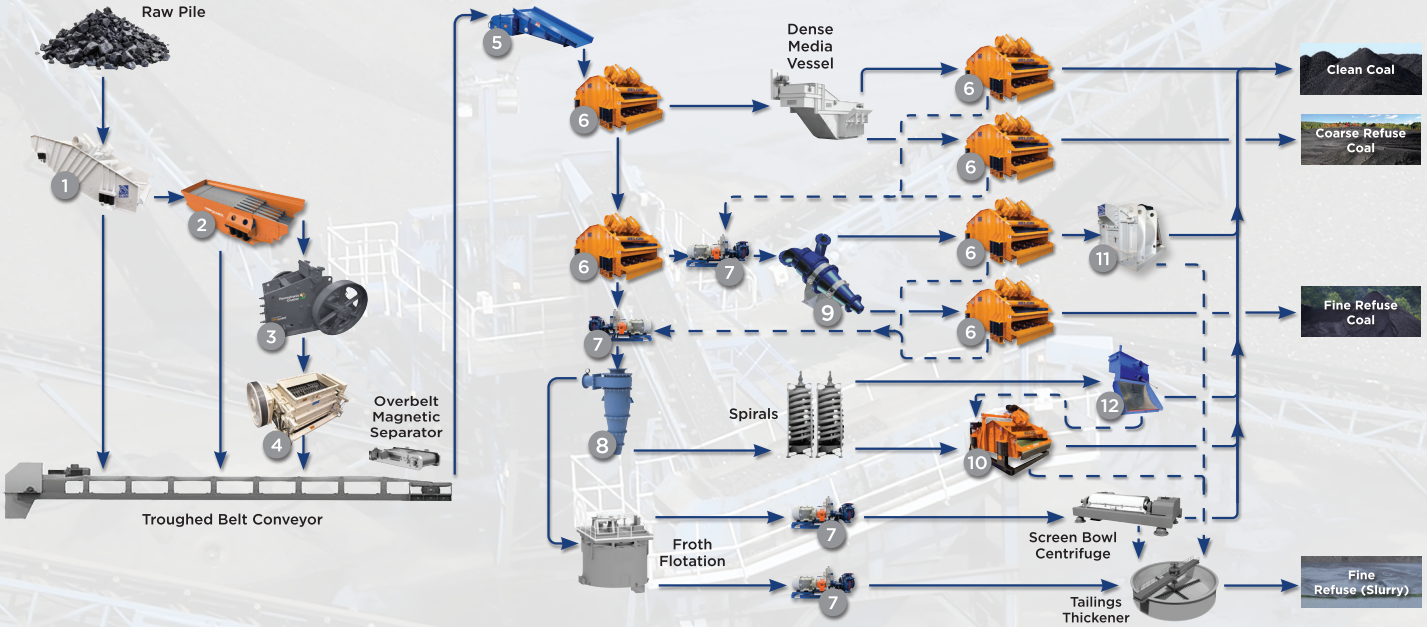

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BLACKOUT AFFIRMS THE VALUE OF AFE RETAIL ELECTRICITY PRODUCT



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FUELING THE FUTURE WITH THE PUREST FORM OF COAL



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FROM LAB TO PORT
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POWER PLAY
THE SYNERGIES BETWEEN COAL AND URANIUM MAKE FOR AN IDEAL INTEGRATED ENERGY MODEL



IT'S NOT JUST THE TARIFFS
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Coal Advocacy

ACC recognizes that in order to support the coal industry we must advocate for our industry in the form of congressional interactions, news and speaking engagements.

Congressional Advocacy

ACC continues to expand our advocacy to congressional leadership. Check out the ACC Congressional Resources web page for further information.

News

Recently Published Articles by Emily Arthun, CEO, American Coal Council

READ NOW



January 2025
American Coal Council Welcomes New Administration — Renewed Commitment to Coal
Cowboy State Daily
The American Coal Council (ACC) extends its congratulations to President Donald J. Trump and Vice President JD Vance on their inauguration as the 47th President and 50th Vice President of the United States.



January 2025
Why the Coal, Oil and Gas Industries Must Join Forces
America's Coal Today
As we turn the page on the Biden Administration and the American people begin to look toward the future with a sense of hope…



April 2025
Why the U.S. Shouldn't Be Importing Electricity From Canada
RealClear Energy
America has always prided itself on energy independence. Our nation's abundant natural resources, innovative technological advancements, and robust energy infrastructure…



February 2025
America's Electric Grid is at Risk — And We Need Coal to Save It
RealClear Energy
A recent report from the North American Electric Reliability Corporation (NERC) sounds the alarm.



March 2025
Coal Remains Backbone of US Economy, Steel Industry
Duluth News Tribune
Metallurgical coal, also known as coking coal or met coal, is a key component of the world economy.



April 2025
The State of Coal and a New Era of Opportunity
Coal Trends
For years, coal has been sidelined, often due to environmental concerns.

Robindale



In the heart of Western Pennsylvania, where remnants from past decades of mining have scarred the land, Robindale stands as a beacon of environmental stewardship. These refuse coal piles, once deemed eyesores and environmental hazards, are meticulously removed and repurposed by Robindale. The company employs innovative technologies and sustainable practices to not only mitigate the environmental impact but also to turn this waste material into a resource.

The reclamation process undertaken by Robindale goes beyond mere cleanup. It is a concerted effort to restore the land to its natural beauty and vitality. By employing state-of-the-art methods, the company not only addresses the environmental challenges posed by these coal piles but also contributes to the creation of affordable energy solutions for America, living up to the motto:

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Speaking Engagements

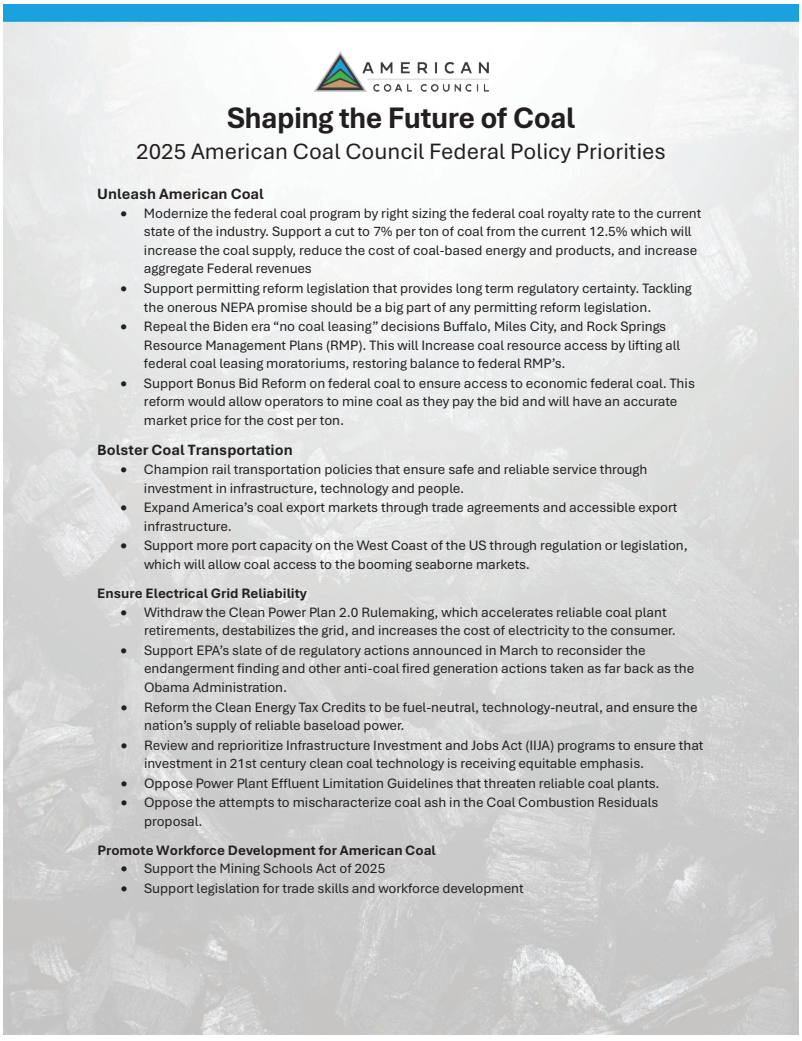
Montana Agri Women Conference – March 2025
Best of the West – April 2025

Presentation to the Subcommittee on Oversight and Investigations, House Committee on Natural Resources: "Unleashing the Golden Age: Examining the Use of Federal Lands to Power American Technological Innovation" May 2025



3rd Annual Fly-In

May 5-8, 2025, the American Coal Council hosted a Congressional Fly-In during which 25 ACC guests met with nine House members, 11 senators, House Natural Resources Committee members and the Senate Energy and Natural Resources Committee.



AMERICAN COAL COUNCIL

Shaping the Future of Coal

2025 American Coal Council Federal Policy Priorities

Unleash American Coal

- Modernize the federal coal program by right sizing the federal coal royalty rate to the current state of the industry. Support a cut to 7% per ton of coal from the current 12.5% which will increase the coal supply, reduce the cost of coal-based energy and products, and increase aggregate Federal revenues
- Support permitting reform legislation that provides long term regulatory certainty. Tackling the onerous NEPA promise should be a big part of any permitting reform legislation.
- Repeal the Biden era "no coal leasing" decisions Buffalo, Miles City, and Rock Springs Resource Management Plans (RMP). This will Increase coal resource access by lifting all federal coal leasing moratoriums, restoring balance to federal RMP's.
- Support Bonus Bid Reform on federal coal to ensure access to economic federal coal. This reform would allow operators to mine coal as they pay the bid and will have an accurate market price for the cost per ton.

Bolster Coal Transportation

- Champion rail transportation policies that ensure safe and reliable service through investment in infrastructure, technology and people.
- Expand America's coal export markets through trade agreements and accessible export infrastructure.
- Support more port capacity on the West Coast of the US through regulation or legislation, which will allow coal access to the booming seaborne markets.

Ensure Electrical Grid Reliability

- Withdraw the Clean Power Plan 2.0 Rulemaking, which accelerates reliable coal plant retirements, destabilizes the grid, and increases the cost of electricity to the consumer.
- Support EPA's slate of de regulatory actions announced in March to reconsider the endangerment finding and other anti-coal fired generation actions taken as far back as the Obama Administration.
- Reform the Clean Energy Tax Credits to be fuel-neutral, technology-neutral, and ensure the nation's supply of reliable baseload power.
- Review and reprioritize Infrastructure Investment and Jobs Act (IIJA) programs to ensure that investment in 21st century clean coal technology is receiving equitable emphasis.
- Oppose Power Plant Effluent Limitation Guidelines that threaten reliable coal plants.
- Oppose the attempts to mischaracterize coal ash in the Coal Combustion Residuals proposal.

Promote Workforce Development for American Coal

- Support the Mining Schools Act of 2025
- Support legislation for trade skills and workforce development

Grassroots Advocacy

American Coal Council Champions Trump's Pro-Coal Policies with 'Irreplaceable Coal' Campaign

The new video campaign, titled "Irreplaceable Coal," injects fresh energy into coal advocacy, using humor and relatability to communicate a powerful truth: coal is not just reliable – it's irreplaceable. With the President's support and bold new policies, the coal industry is poised for a revival, and the ACC is at the forefront, ensuring that message resonates nationwide.



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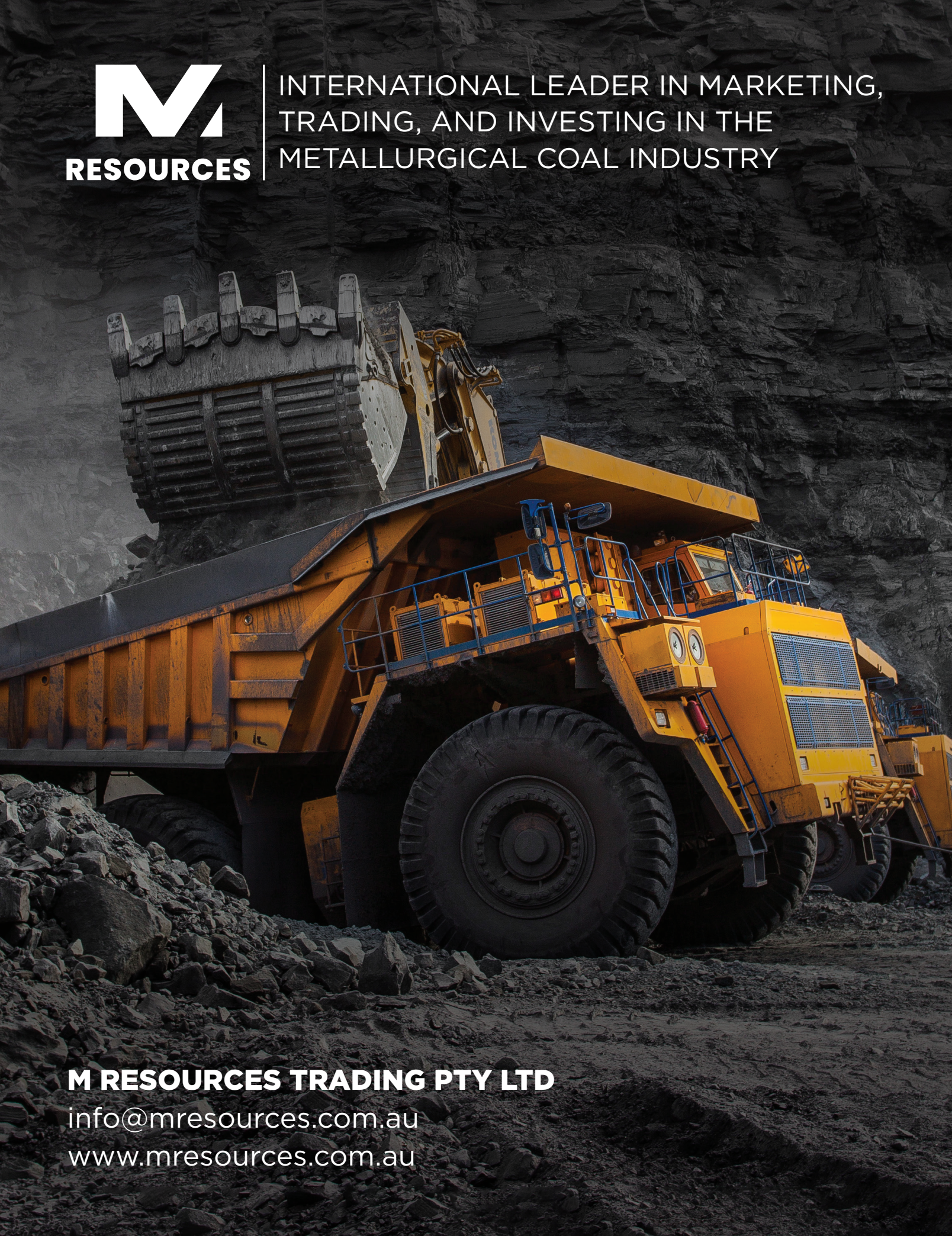
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Shaping the Future of Coal — Advocacy, Action and a Path Forward



EMILY ARTHUN
CEO,
American Coal Council

June 1 marked my three-year anniversary with the American Coal Council (ACC), and I want to take a moment to reflect on the journey and express my gratitude. The unwavering dedication of our members and supporters has been the driving force behind ACC's advocacy. Your passion for this industry inspires me daily, pushing me to represent coal with conviction and determination. A special thank-you to the ACC board of directors. Your leadership has been instrumental in shaping a strong foundation for coal's future.

On April 8, 2025, I had the privilege of sitting in the East Room of the White House as President Donald Trump issued a historic Executive Order in support of coal. It was a defining moment, underscoring coal's enduring role in national security, economic stability and energy reliability. ACC applauds the administration's recognition of our industry and welcomes the opportunity to reshape public perception of coal. But to truly secure its future, we must act decisively and strategically.

Since that pivotal day, ACC has amplified its advocacy efforts in Washington, ensuring coal remains a central part of policy discussions. In early May, ACC organized a Washington, D.C. fly-in, where members spent three days meeting face-to-face with key policymakers, engaging in critical discussions and uniting to champion coal and energy security.

On May 21, I testified before the Subcommittee on Oversight and Investigations of the House Committee on Natural Resources during the hearing "Unleashing the Golden Age: Examining the Use of Federal Lands to Power American Technological Innovation." I advocated for coal as a critical fuel source that is essential to meeting the rising energy demands driven by AI data centers and cryptocurrency mining. Among coal supporters in Washington, there is a shared understanding that the time to act is now. Our window to influence the future of coal is short, and we must be bold in our advocacy and leadership.

Leading the Charge for Coal's Future

ACC is committed to shaping a dynamic future for coal through diverse initiatives. In addition to our value-added conferences, we have expanded our outreach efforts with the launch of the Coal Nation podcast, grassroots advocacy campaigns, social media initiatives and op-eds. These efforts are vital, but they require sustained support to ensure that coal remains a driving force in America's economy and energy strategy.

Four Key Priorities for Shaping Coal's Future

The coal industry faces numerous challenges, from renewable energy subsidies and mandates and baseload plant closures to evolving trade policies and market fluctuations. To navigate this landscape and ensure coal's continued success, ACC is focused on four critical priorities:

1. **Protecting the Nation's Coal Supply Chain:** Streamlining project approvals and safeguarding existing permits are critical to preserving and strengthening coal's supply chain for future generations.
2. **Enhancing Coal Transportation Infrastructure:** Investments in coal transportation systems, from railways to port facilities, are essential to ensuring coal's global competitiveness and longevity.
3. **Ensuring Grid Reliability and Affordability:** Unlike intermittent renewables, coal-fired plants provide steady, on-site fuel stockpiles, offering reliability and resilience as we shape America's energy future.
4. **Developing and Supporting the Coal Workforce:** Skilled trades and professional roles are vital to coal's success. Investing in workforce development will empower the next generation of coal leaders.

A Call to Action: Be Part of Coal's Future

The United States has vast coal reserves estimated at over 250 billion recoverable short tons, ensuring coal remains a reliable energy source for decades to come. Beyond energy production, coal is also a critical resource for rare earth elements (REEs), which are essential for advanced technologies, including microchips. Metallurgical coal, particularly in federally permitted areas of Alabama, supports infrastructure development and economic growth.

Now, more than ever, ACC needs your voice, your advocacy and your sponsorship. ACC sponsors have enabled us to rebrand, enhance conferences, publish impactful articles and strengthen grassroots efforts. Your continued support will ensure that the progress we've made doesn't stall.

The path forward requires unity, determination and decisive action. The time to shape coal's future is now. Let us move forward with strength and commitment. With your help, we can make coal great again.

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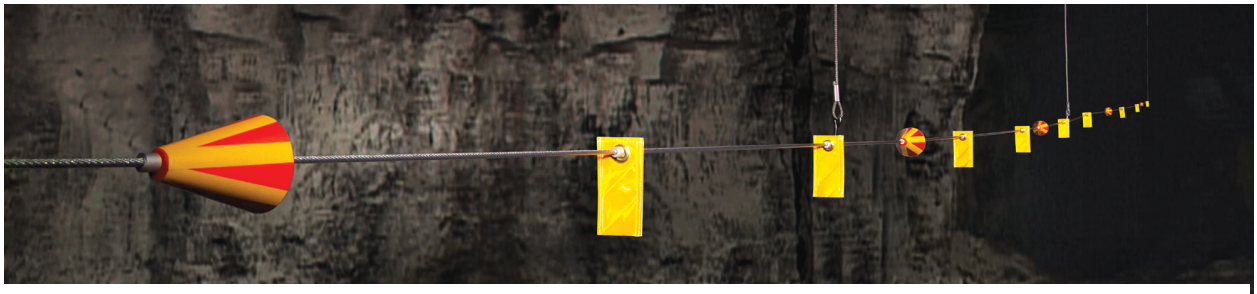

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How The ACC Champions U.S. Coal, Innovation and Energy Security



BILL MCFADDEN
PRESIDENT,
American Coal Council

In a time of transformative shifts in the American energy landscape, the American Coal Council remains a vital force advocating for the role of coal in powering the U.S. economy, preserving grid reliability and securing energy independence. As president of the ACC's Executive Committee, I take great pride in highlighting the accomplishments of our organization, and especially the leadership of our CEO, Emily Arthun, in elevating the voice of the U.S. coal industry through effective advocacy and an expanded public outreach strategy that includes a strong, modern social media presence.

Emily has brought focus, energy and measurable results to the ACC's advocacy. From congressional testimony to regulatory engagement to social media presence, she is a respected leader who presents coal's role clearly, credibly and persuasively. Under Emily's leadership, ACC's advocacy has expanded beyond the traditional uses of coal to include support for innovative technologies that reduce emissions and next-generation coal use, including coal-derived rare earth elements (REEs), vital to national security and high-tech manufacturing. We have expanded our summer conference in Park City, Utah, to focus not only on coal markets, but also on innovations in coal. In August, we will hear from innovators in the coal space and are hoping that the conference will attract investors as well.

ACC's policy priorities are grounded in a pragmatic understanding of the energy market and the technological future of coal:

- **Regulatory balance:** Advocating against impractical mandates while supporting funding for technologies to reduce emissions through innovation.
- **Technology advancement:** Including not only clean coal technology but also other coal initiatives such as the extraction of rare earth minerals from coal, the use of coal ash in building products and the development of other coal-based materials.
- **Permitting reform:** To cut red tape and allow for coal mining projects, including those on federal lands, to get up and running quickly.
- **Export and trade fairness:** Ensuring that American coal competes in global markets.

Over the last few months, ACC's presence in Washington in support of our policy priorities has been significant. I recently joined Emily in Washington where she testified in front of the Subcommittee on Oversight and Investigations, House Committee on Natural Resources. She did a masterful job in representing coal as a critical fuel source necessary for powering our increased energy needs driven by AI data centers and cryptocurrency mining. Earlier in May, the ACC organized a Washington, D.C. fly-in during which ACC members spent three days meeting face-to-face with key policymakers, engaging in critical discussions impacting our industry and uniting with peers to advocate for the future of coal and energy. In December, Emily and members of ACC's Board of Directors met with key House and Senate members from leading coal states.

Recognizing the need to reach broader and younger audiences, the ACC has revamped its digital communications under Emily's leadership. Today, our voice extends far and wide, thanks to a robust and expanding social media strategy. Our followers on major social media platforms have grown exponentially, our Coal Nation Podcast launched this year and enjoys a strong following, and we launched a grassroots advocacy campaign, producing the first of a series of videos focusing on the reliability and "irreplaceability" of coal.

The importance of coal for grid reliability remains central to our message. Coal-fired power plants can store fuel on site and operate during natural disasters, cold snaps and supply chain disruptions. Repeated grid crises have proven one thing: when reliability is needed most, coal delivers. Americans of all ages and backgrounds must clearly understand and acknowledge coal's vital place in the energy mix. Our digital media and communications initiatives are reshaping perceptions, reinvigorating our base and establishing ACC as a thought leader in energy advocacy.

The U.S. coal industry is not static. It's dynamic, innovative and diverse. Through relentless advocacy, public education and a commitment to technological progress, the American Coal Council is ensuring coal's place not just in today's energy mix, but in tomorrow's critical infrastructure, advanced manufacturing and national defense.

I stand alongside Emily, my colleagues on the ACC Executive Committee, Kelli Sweet and Fran Taglia, our Board of Directors and the many members of the American Coal Council who believe, as I do, that coal is essential to America's strength, security and economic growth. With our expanded reach, growing influence and forward-looking agenda, the ACC is leading the next chapter for our industry.

We appreciate your support, so please keep it coming. We invite all to join us in promoting coal as a vital resource for a strong, secure and innovative energy future.



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ACC exclusively represents the collective and mutual interests of the entire coal industry. ACC's membership includes coal suppliers, consumers (utility and industrial), energy traders, coal transportation companies and support service firms.

WHY JOIN ACC?

As a member of ACC, you'll benefit from premier educational programming, broad-based, high-level networking, coal advocacy, policy input and enhanced industry visibility. Along with a suite of ACC events and publications, you'll also see the benefits of frequent member communications and business referrals. Additionally, ACC programs, committee memberships and activities provide opportunities for members to advance their professional skills, keep current on emerging trends and industry developments, gain experience and make new contacts.

AMERICAN COAL COUNCIL

INDUSTRY-WIDE INFORMATION RESOURCES:

ACC provides a comprehensive perspective on coal supply, demand, environmental, regulatory, financial and public policy issues, helping our member companies throughout the coal supply chain achieve success.

BALANCED PERSPECTIVE ON CRITICAL INDUSTRY ISSUES:

A non-adversarial approach to business relationships, recognizing that today's business climate requires increasing cooperation to achieve beneficial results.

ADVOCACY:

ACC advocates for coal – in the halls of Congress, the media, industry forums, regulatory arenas and among community leaders and the public – as an economic, abundant/secure and environmentally sound fuel choice.

BREADTH AND DEPTH:

ACC conferences, publications and information resources are designed to advance the many and varied business activities of its member companies.

EQUAL FOOTING:

All members of ACC are fully vested in the association. All sectors of the coal supply, transportation, consumer, trading and support services industries are equal members with full participation and voting rights.

INTERESTED IN MEMBERSHIP?

For more information on becoming a member of the American Coal Council, please reach out to us today!
Website: **www.americancoalcouncil.org** Email: **earthun@americancoalcouncil.org** Call: **202-941-8900**

ACC WELCOMES ITS NEW MEMBERS!

The board and staff would like to welcome these new members, as it is only through the support of our membership and industry that ACC can continue to provide educational programs, market intelligence, advocacy support and peer-to-peer networking forums whereby we advance members' commercial and professional development interests.

With the many changes occurring in our industry, it is essential that we continue to work together to represent the collective interests of the American coal industry and advocate for coal as an economic, abundant and environmentally sound fuel source.

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AMERICAN COAL COUNCIL

ACC VISION & MISSION STATEMENTS

VISION STATEMENT
ACC advances the power, the promise and the pride of America's coal industry.

MISSION STATEMENT
American Coal Council (ACC) provides relevant educational programs, market intelligence, advocacy support and peer-to-peer networking forums to advance members' commercial and professional development interests.

ACC represents the collective interests of the American coal industry in advocating for coal as an economic, abundant and environmentally sound fuel source.

ACC serves as an essential resource for industry, policymakers and public interest groups. The Association supports activities and objectives that advance coal supply, consumption, transportation and trading.

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A Lesson From Spain and Portugal

Blackout Affirms the Value of AFE Retail Electricity Product

Ben Kelly, Chief Commercial Officer, Powervine Energy

Introduction

With energy supply and demand in the news, coal is having a moment in the spotlight. A unique retail electricity concept is poised to engage consumers and give the fossil fuel industry a voice at a critical time. American Fossil Energy (AFE) is a new retail electricity product offered in Ohio and Pennsylvania by Powervine Energy. AFE was created to bring a choice to patriotic energy consumers who value reliable, affordable and secure American energy produced from abundant American coal and natural gas. AFE supports charitable causes aligned with the fossil fuel community and partners with coal and natural gas-fueled power producers to source energy and fossil energy credits.



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Crisis as Catalyst for an Idea

During 2022, I sat at my desk watching energy markets with a growing sense of disbelief. An energy crisis had gripped Europe after the continent shut off much of the natural gas and coal it previously imported from Russia. The crisis found its way into global markets through the price linkages in liquefied natural gas (LNG) and coal cargoes that were being rerouted into the suddenly short European energy market. My job at the time involved working in the wholesale power markets for a company that had 6,500 MWs of coal and nuclear generation in PJM, along with a large retail power business. It was a front row seat to surging prices for power, natural gas and coal. These were markets that had been relatively tame for most of the preceding decade.

At the same time this crisis was unfolding, the Biden administration was promoting the *Inflation Reduction Act* as a solution. It was a wide-ranging piece of legislation that contained, among other things, a massive expansion of federal support for renewable energy projects. The cognitive dissonance was hard to ignore. For years, European governments had been supporting a huge expansion of renewable energy at the cost of their legacy fossil fuel infrastructure. Conventional energy production on the continent had been discouraged as governments adopted zero-carbon agendas. The coal and oil and gas industries faced tremendous obstacles to resource development that undermined investor confidence. With supplies from Russia curtailed, the continent was at the mercy of imported fuel and weather-dependent power generation. Within weeks, costs for consumers soared and industrial production became uncompetitive.

I knew the *Inflation Reduction Act* would not yield the intended outcome. While the act aims to promote clean energy, its unintended consequences would likely be weakening grid reliability. In addition to incentivizing intermittent generation at the expense of dispatchable resources, the act represents an unlimited call on the U.S. Treasury. The clean energy tax credits have been referred to by Treasury Secretary Scott Bessent as "a doomsday machine for the budget."

Amid these developments, the idea was born: market proven, dependable fossil energy directly to retail energy customers. I'd been watching for years as once-reliable coal plants struggled as intermittent renewables received government subsidies. I knew there were other like-minded Americans who recognized our standard of living was no accident. Fossil fuels had built a strong economy, and the public needed to recognize and support those resources. A fact-based marketing campaign extolling the virtues of reliable, affordable and secure American coal and natural gas would find an audience.

Retail Energy 101

I have been working around retail energy for over a decade. For those unfamiliar, the way consumers purchase energy across the U.S. varies. Many states, particularly in the South and West, have maintained traditional regulated utility models. Others, such as Ohio, Pennsylvania, Maryland and Texas have deregulated or restructured their energy markets.

Electricity bills for consumers in these deregulated markets are split into two components. The first charge is related to the traditional monopoly utility that distributes and delivers electricity across its system of wires. Customers have no choice regarding the utility



A recent blackout in Spain and Portugal highlighted the vulnerability of an electric grid that relies too heavily on solar and wind.

charges. The second portion of the bill is for the energy the customer uses. In deregulated states, customers can shop for the energy portion of their bill. The energy suppliers in this competitive market are referred to as retail energy providers (REPs).

Powervine Energy is a REP operating in Ohio, Pennsylvania and Maryland. We offer the AFE product in Ohio and Pennsylvania with ambitions to expand to other markets.

The AFE retail energy product is unique because we don't shy away from promoting the benefits that fossil energy brings to everyday Americans. We're proud to advocate for energy sources that are affordable, reliable and secure. Furthermore, we support charitable causes like scholarships that are near and dear to the fossil fuel industry. When we source wholesale energy on behalf of our customers, we partner with fossil-fueled power generators to secure energy and fossil energy credits. Our customers directly support the fossil resources that keep the lights on and the American economy strong.

The Right Message at the Right Time

A resurgence in demand and rising prices have brought energy to the top of the Trump administration's agenda. For the first time in almost two decades, demand forecasts for electricity have started to rise sharply. Data centers, electrification and reindustrialization are causing utilities to upwardly revise forecasts for electrical consumption. These new forecasts have run head-on into a power supply stack that has suffered a wave of retirements, mostly baseload coal.

The administration has taken decisive action to bolster fossil fuel production and prevent additional plant closures. It's a great start, but I believe the public's hearts and minds must be engaged on these issues. I've long believed that the fossil energy industry should advocate for itself directly to American energy consumers at the grassroots level.

AFE's retail electricity product is a powerful vehicle for that conversation. I often see industries advocate public policy ahead of elections. It's understandable because voters are gathering information as they contemplate the issues before heading to the ballot box. However, I firmly believe that it behooves an industry to always be communicating the benefits it delivers to society.

The renewable energy industry has done a remarkable job of dominating the debate over carbon emissions. The fossil fuel industry needs to remind the public about the benefits of on-site fuel at a coal-fired power station, the value of abundant and secure fuel supplies that don't need to be imported and the ability to make

electricity in all kinds of weather conditions, when it matters most. AFE's retail marketing message is here to deliver those positive messages and give consumers a choice in how they spend their energy dollars.

Every day brings new evidence of the value of affordable, dispatchable and secure energy supplies. China continues to operate and expand the largest coal generation fleet in the world. It's not well known but China implemented a capacity payment system to compensate coal plants and maintain the coal fleet's reliability as they scale up renewable generation. For all the criticism I could level at state-directed economic planning, maintaining a robust coal generation fleet makes sense if your goal is to enhance the living standards of 1.4 billion people and be the world's factory.

A recent blackout in Spain and Portugal highlighted the vulnerability of an electric grid that relies too heavily on solar and wind. On April 28, a massive power outage took down the entire electrical system in Spain and Portugal. According to Reuters, at the time of the outage, solar generation was supplying 59% of the system. Unlike coal or gas, solar generation doesn't impart "inertia" to the grid. Inertia is supplied by conventional thermal generation such as coal, natural gas or nuclear power that puts energy into the system with a large rotating mass as a stabilizing force. This benefit of conventional power production is required to maintain the frequency of the grid in the event of disturbances. Without it, the system can become unstable, equipment trips offline proactively and eventually, the entire electrical grid can shut down.

I could go on all day about the benefits that fossil energy imparts to our modern lives. It's exactly why we launched American Fossil Energy: to offer consumers a choice and be a voice for the fossil fuel industry.

We're excited to deliver a positive message about the industry that has been the backbone of American prosperity. If you would like to learn more, please visit us at: www.americanfossilenergy.com




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The Anthracite Advantage Fueling the Future With the Purest Form of Coal

Bill Clark Sr., Vice President, Coal Sourcing, Reading, Blue Mountain and Northern Railroad

Coal [kōl]

Noun: 1. a combustible black or dark brown rock consisting mainly of carbonized plant matter, found mainly in underground deposits and widely used as fuel (Coal Flashcards, quizlet.com).

So, what is coal? Simply put, coal is a rock. There are three major types of rock: igneous (formed from magma), sedimentary (formed by the accumulation or deposition of mineral or organic particles) and metamorphic (igneous and sedimentary rock that is subject to greater heat and pressure). All coal is formed from sedimentary rock.

Coal is ranked into classifications:

1. Lignite – At 60 million years old, lignite is the youngest of all coals. It is formed at low heat (100° F) and has the least amount of carbon (25%-35%). At 4,000-8,000 British thermal units (BTUs), it contains the least amount of energy. Lignite is used exclusively for electric generation.

2. Subbituminous – The second-ranked coal was formed at higher heat (120-200°) and is about 250 million years old. The carbon content and BTUs are higher than lignite (42%-52% carbon, 8,200-11,000 BTUs). Subbituminous coal is also used in electric generation.
3. Bituminous – Ranked third, bituminous coal is the oldest sedimentary coal. Formed over 300 million years, at 300°, bituminous coal has a carbon content of 45%-86%, with a BTU rating of 11,000-13,000. While primarily used to make electricity, higher grade bituminous coal is also used to make metallurgic coke. Coke has properties similar to anthracite and is used in steelmaking.

When bituminous coal is subjected to higher temperatures (350+° F), over 350 million years, it metamorphosizes into anthracite coal (making anthracite a metamorphic and not a sedimentary rock). Through the process of becoming anthracite, any remaining sediment is converted to carbon. As a result, anthracite is close to pure carbon (up to 95%). The heat content is higher than any other coal, but because of the high carbon content, anthracite is more difficult to ignite. This disadvantage is more than offset by the lack of pollutants, making anthracite an ideal fuel for home heating and for applications requiring pure carbon.

While much more expensive than other coals, anthracite's makeup is ideal for many applications. While natural gas and electricity heat most homes in the United States, anthracite is still a source of heat for many areas without access to natural gas. Anthracite is used as a medium to purify water, as an additive to improve charcoal and because of its high heat, making pizza!

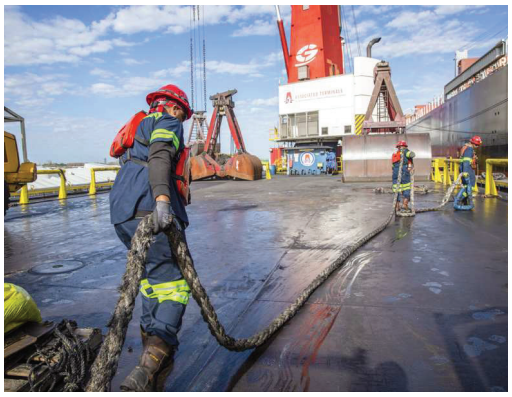
Reading and Northern serves three major industries that rely on anthracite:

1. Steelmaking: An electric arc furnace (EAF) uses electricity to melt scrap steel. In an EAF, electrodes are inserted into a furnace that is filled with scrap steel, pig iron and lime. The electrodes pulse electricity, raising the temperature to at least 3,000° F.
   Anthracite provides several critical roles in the steelmaking process. Due to its high carbon content, anthracite is used to increase the carbon level of the finished steel. Carbon not only strengthens steel, it allows steel to be more flexible, reducing brittleness. Anthracite's high BTU levels reduce the need (and cost) of electricity and natural gas. Anthracite is used to remove impurities from scrap metal and also helps protect the furnace lining. When anthracite is injected into molten metal, it attaches to various impurities in the scrap (oils, paint, chemicals, etc.). When combined with these impurities, anthracite forms foamy slag. Foamy slag covers the top and sides of the furnace, acting as an insulator, protecting the refractory brick and helping to retain heat.
   Carbon is critical in the steelmaking process; you can't have steel without carbon. While there are alternatives (metallurgic, petroleum and foundry coke), nothing surpasses the quality and effectiveness of anthracite, "the natural coke."

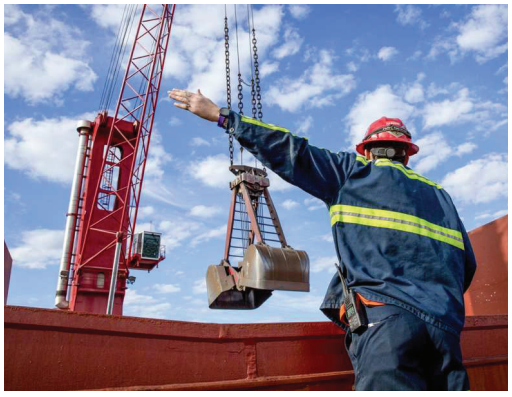
2. Zinc Recycling: EAF dust is a byproduct of the EAF process. EAF dust is the remnants of the purification process using anthracite. Interestingly, anthracite is used in processing these pollutants into beneficial products. The pollutants in EAF dust are among the most hazardous metals the EPA tracks. Cadmium, chrome, lead, mercury and arsenic are present in high concentrations, as is dioxin. Without this process, dust would be transported to hazardous waste facilities for interment, which is not an environmentally friendly process.
   Recycling EAF dust is straightforward. Anthracite is combined with dust in a

THE ASSOCIATED SOLUTION









Process that delivers real value. Direct loading between inland barge and ocean vessel saves extra handling costs, and eliminates shrinkage and contamination potential.

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long (up to 1,000-foot) kiln. The kiln is heated to 950° F and a conveyor moves the dust/anthracite mixture. By the end of the kiln, anthracite has combined with the dust to create two product streams. Slag is used to make Portland cement and zinc oxide is refined further to make pure zinc. Other than a small amount of precious metals, there are no other byproducts. What was a hazardous waste is now material used in construction and steelmaking, as well as in other products.
As it does with steel, the refining process requires carbon. Coke can be used to blend with anthracite, but 100% anthracite is ideal.

3. Sugar beet refining: Fifty-five percent of the sugar produced in the United States comes from sugar beets. Most of this is produced in the Upper Midwest (Minnesota and the Dakotas) and the Pacific Northwest (Wyoming and Idaho). Anthracite is used in the initial step to produce a dense mass of sugar crystals (massecuite). Carbon is used to bind with non-sugar solids that are removed from the massecuite, allowing the crystals to be further refined and processed.

The discovery of anthracite helped early America grow to be a world power. From its use propelling ships, heating homes and businesses to the iron and steelmaking process, anthracite produced an incalculable amount of wealth and prosperity, not only for the United States, but for the world. The qualities that made anthracite valuable then still hold true today. Anthracite is an environmentally friendly source of carbon. Its value as a purification medium impacts our lives every day, from the water we drink and the sugar we stir into our coffee to the steel used in the car, bus or rail car we use to go to work. Pennsylvania has some of the largest anthracite reserves in the world, which will continue to have a global impact. We at "The Road of Anthracite" are proud of the small part we play in helping to get American anthracite to customers in the U.S. and throughout the world.



Appalachia Our Home and Common Ground

Dr. Brandy Calvert, Director of Philanthropy, Christian Appalachian Project

Appalachia is home to the coal industry's beginnings in America and was the country's primary coal-producing region until the latter part of the 20th century. Ask almost any present-day coal operator and they'll tell you that they got their start in Appalachia or they learned their way in the business from a mentor in these mountains. Many men and their families found a beloved home as they worked to make a living in the hollers and hills of Appalachia. Their neighbors became their co-workers and their community.

Coal and Christian Appalachian Project (CAP) call this common ground "home" and share a love of the people of Appalachia that runs as deep as the mine. People who are hard-working, resilient, innovative and industrious, and at once humble and proud. People with grit and with grace.

Founded in 1964, CAP is proud of its history of standing in the gap to help people in need in Appalachia. For 60 years, CAP has worked to build hope

and transform lives in the heart of America, the 13 Appalachian states that span from New York to Alabama. The impact of CAP's work is longstanding and far-reaching. CAP is the flagship charitable organization in the region, recognized as one of the nation's top non-profits, leading transformational change for the children, families and seniors whom we serve.

The challenges for the people in Appalachia can be extreme and the needs are often dire. Through the generosity and faithful friendship of CAP's supporters across the country, CAP food pantries provide nutritious food to over 5,000 people per year. CAP ensures that children, their families and seniors have safe, warm and dry homes. CAP cares for the needs of families through our family advocacy program, provides early childhood education, youth development programming, counseling services, elderly services and more. In short, the organization seeks to serve the whole family and to meet the most urgent and prevalent needs in communities throughout the region.



When disaster strikes, CAP stands ready to respond by initially providing essential life-saving items to survivors of floods, tornadoes and even Hurricane Helene. "We are neighbors helping neighbors," Robyn Renner, CAP's disaster relief director, explained. After initial needs are met, CAP is there to rebuild homes and lives. Most recently, when unprecedented flash-flooding jeopardized thousands throughout Kentucky, CAP was there for families in their darkest days. "We will stand alongside people in need in Appalachia in the days and weeks to come," Renner added.

We are neighbors helping neighbors.



CAP is a community of care made possible by our donors' compassion. We invite you to be a part of this transformative mission, to both empower the work of the organization and the people we serve. There are many ways to connect, by sharing your resources, by volunteering, by engaging with us on social media and by lifting CAP up in your prayers. Please visit our website at www.christianapp.org/coalforum to learn more. Join us today.

Contact Dr. Brandy Calvert at bcalvert@chrisapp.org.



The SGS Lab in Beckley, WV

From Lab to Port
The Global Company Working Behind the Scenes to Support the Coal Industry

Zac Brown, Manager, Sales Enablement and Marketing, Natural Resources, SGS

For decades, coal has played a significant role in the economic and industrial development of the United States as the primary source of electrical power. While its use has declined in recent years due to the shift toward renewable energy, coal remains important. So much so that it accounts for 36% of global electricity and about 15% of the power generated in the United States as of 2024. In addition, coal remains key in steel production (as coke), cement manufacturing, chemical feedstock and other industrial processes.

SGS, the world's leading testing, inspection and certification company, has been involved for decades in every aspect of the coal, coke and petroleum coke supply chain around the globe. Recognized by *Time* magazine as one of the world's most sustainable companies in 2024, ranking sixth out of 500 globally, SGS can help the industry incorporate the best methods for sustainable development. Across the entire supply chain, SGS provides solutions that incorporate specialized services targeted at minimizing environmental impact, ensuring regulatory compliance and supporting sustainable operations, including helping insights towards developing focused water

management and discharge strategies.

"As global supply chains become more complex, we find clients are looking for companies like SGS with a track record of helping them verify the quantity and quality of their coal, coke and petroleum coke products," says Buddy Hancock, a 50-year veteran in the industry and currently senior director, eastern operations for SGS North America, Natural Resources.

SGS, which began its operations in 1878, is backed by a global network and services its clients at every major port across the U.S. to deliver independent expertise from its network of state-of-the-art laboratories. This provides companies with everything from testing to inspection and risk management to ensure quality, quantity and regulatory compliance for their coal, coke and petroleum coke commodities.

"International coal traders today are looking for impartial, independent analysis that they know is critical for their successful operations. They need partners who can help analyze their risks and streamline the entire trading process," Hancock says.

He adds: "Clients today require global technical leadership and industrial expertise every step of the way. Our state-of-the-art laboratories offer independent, third-party commercial analytical services at all the critical supervision and transfer points. Rapid turnaround times allow clients to assess their commodities and ultimately ensure their contractual compliance."

Through a network of laboratories positioned across North America, anchored by the SGS Beckley Center of Excellence in West Virginia, Henderson, KY and Denver, CO laboratories, among others, SGS conducts coal, coke and petroleum coke analysis under strict laboratory conditions including:



SGS inspectors and samplers represent a client's interests at ports and terminals across the United States for trade inspection, equipment inspection, bulk cargo sampling, concentrate sampling and regulatory compliance for their commodities.

- Total moisture
- Proximate analysis
- Ultimate analysis
- Gross calorific determination
- Net calorific, fixed carbon and CO2 calculations
- Hardgrove grindability index
- Mineral constituents – ash analysis for major and minor elements
- Trace element analysis
- Ash fusion temperatures in reducing and oxidizing atmospheres
- Coal petrography
- Float sink and washability testing
- Rheology of coal (Gieseler plastometer test, Arnu dilatometer test, Sapozhnikov test, G-caking index test)
- Forms of sulfur
- Free swelling index (FSI)/crucible swelling number (CSN)
- Bulk density
- Size analysis

Additional coke analysis that SGS provides includes:

- Total moisture
- Proximate analysis
- Fixed carbon calculation
- Ultimate analysis
- Mineral constituents – ash analysis for major and minor elements (includes phosphorus)
- CSR/CRI
- Micum testing
- Size analysis
- Calculation of mean size

"What makes SGS truly unique is the decades of experience we have in providing clients with the wide range of technical insights they need into the type of coal they have, its composition, structure and origin," Hancock says.

This starts with what is known as coal petrography, the microscopic study that involves

analyzing coal under reflected light microscopy to identify its maceral content (the organic constituents of coal), mineral matter, quantifying coke texture and reactivity, especially in metallurgical coal, and rank (a measure of coal maturity). It is important to conduct a coal petrographic study to help:

- **Evaluate coal quality:** Petrographic analysis helps determine how the coal will behave during combustion, gasification or carbonization.
- **Optimize industrial applications:** For metallurgical coal, petrography is critical for prediction of coke strength and reactivity which directly impacts steel production. For thermal coal, petrographic analysis helps in predicting overall combustion efficiency and ash behavior.
- **Support exploration and resource classifications:** Petrography is key in classifying and modeling coal resources to help with mine planning and reserve estimation.
- **Monitor environmental and other compliance issues:** Understanding coal composition helps provide insights into emissions characteristics and helps meet regulatory standards.

"Our technical petrographic studies provide key insights into how coal performs across different applications. This helps support better decision-making, from exploration and production to end-use performance and environmental management and evaluates bituminous coals and coal blends in terms of their ability to produce blast furnace coke," Hancock says.

In addition to commercial analysis, for decades, SGS has helped clients design, engineer and operate efficient on-site laboratories tailored to their specific needs, including creating new laboratories or taking over existing laboratories on coal operations. Each SGS on-site laboratory is designed with high quality control standards in mind and calibrates technologies to the specific deposit, with methods and detection limits reviewed and validated regularly to ensure that data quality objectives are being met and maintained.

SGS on-site laboratories typically run 12 to 24 hours a day and up to 365 days a year, to provide constant support and information. The same quality standards in an SGS commercial laboratory are replicated and upheld for all on-site laboratories regardless of how remote the location.

"We realize finding staff, especially in more remote areas, can be challenging. That's why we help clients find and retain talent or even bring them in from within our network. This has the added value of being more sustainable by employing local talent, reducing transportation costs and minimizing sample turnaround times," Hancock says.

He adds that working globally from the world's major ports, mining and refining locations, SGS is positioned to protect a client's interests and reduce trade risks, ensuring the coal commodities meet global standards for quality and excellence. With inspectors strategically located near all major ports around the U.S., including the Gulf Coast, East Coast, the Great Lakes, West Coast and Alaska, SGS inspectors also travel to remote areas to ensure that commercial transactions are protected and any risks are ultimately reduced.

Hancock says whether you are a buyer, seller or transporter of coal, coke or petroleum coke commodities, SGS has one goal and that is to ensure shipments meet international standards and specifications.

"The value of the coal, coke or petroleum coke cargo shipments is best determined by a quality and quantity assessment based on impartial sampling and analysis. Our inspectors and samplers represent a client's interests at ports and terminals across the United States for trade inspection, equipment inspection, bulk cargo sampling, concentrate sampling and commercial analysis."

SGS trade inspection and sampling services for the coal sector include:

- Pre-shipment inspection
- Loading and discharge supervision
- Sampling
- Quality and quantity inspection
- Cleanliness inspection
- Damage survey
- Draft survey
- Tally
- Marine inspections

No matter whether you focus on coal, coke or petroleum coke, SGS experts will be by your side every step of the way, independently assessing the quantity and quality value of the commodity to minimize your commercial risks.

Hancock concludes that SGS is uniquely positioned across the U.S. to help reduce supply chain risk and ensure the safe delivery of valued coal, coke and pet coke commodities. Contact SGS at www.sgs.com/naturalresources or via email at nam.naturalresources@sgs.com to learn how SGS can assist across the entire coal, coke and petroleum coke supply chain.

MINING EXTENSION

The Mining Extension Service was estabilished in 1913 to extend the resources and expertise of West Virginia University to the coal miners of this state, the nation and beyond.

Our certified instructors provide opportunities for personal, educational and industrial advancement through instructional courses:

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- Mine Fire Safety
- ... or other related courses as required.

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Power Play
The Synergies Between Coal and Uranium Make for an Ideal Integrated Energy Model

Max Ukropina, Project Development, Valar Atomics

Coal has long been a cornerstone of global energy production, valued for its reliability and energy density. Its chemical composition, rich in carbon and hydrocarbons, positions it as a versatile resource with significant untapped potential. Valar Atomics proposes a transformative strategy to maximize coal's utility by leveraging it in two phases: first for electricity generation and then for producing high-value synthetic fuels. By integrating advanced nuclear technology, specifically small modular reactors (SMRs), this approach extends the operational life and economic viability of coal plants. This article examines the technical and economic merits of this dual-use model, highlighting the complementary attributes of coal and uranium as energy sources and the scalable framework developed by Valar Atomics to ensure coal remains a vital energy resource.

Coal and Uranium Are Complementary Energy Resources

Coal and uranium share characteristics that make them

robust energy sources. Both are energy-dense, capable of delivering substantial power outputs. Coal, formed from organic matter, releases thermal energy through combustion, ideal for consistent electricity generation. Uranium, used in nuclear reactors, generates energy via fission, offering high efficiency and reliability. Both resources are stable for long-term storage, ensuring dependable supply chains. Their compatibility lies in their ability to meet baseload energy demands, making them suitable partners for an integrated energy model.

Historically, coal powered the Industrial Revolution, driving economic growth through steam engines and electricity. Since the mid-20th century, uranium has fueled the nuclear age, providing high-efficiency energy with minimal fuel volume. Valar Atomics leverages these similarities to create a synergistic system that enhances coal's role in the energy sector. By combining coal's chemical versatility with uranium's high-energy output, this model positions coal as a multi-faceted resource capable of addressing diverse energy markets.

Valar Atomics' Integrated Energy Model

Valar Atomics' strategy centers on large-scale energy complexes that integrate coal plants with modular nuclear reactors, optimizing coal's utility while introducing new revenue streams.



Modular Reactor Manufacturing

Valar Atomics employs a standardized, modular approach to manufacture SMRs and hydrogen synthesis units, using simple, repeatable designs to streamline deployment. These high-temperature gas-cooled reactors (HTGRs) operate at elevated temperatures, enabling efficient hydrogen production and chemical synthesis.
The modular design reduces capital costs and construction timelines, ensuring scalability. Proven through operational facilities in multiple countries, HTGRs offer reliability, high thermal efficiency and inherent safety features, such as passive cooling, supporting the coal industry's long-term viability.

Energy Complex Infrastructure

These energy complexes combine multiple SMRs with existing coal plants, creating economies of scale by sharing infrastructure costs. They produce electricity, synthetic fuels, hydrogen and process heat for co-located industries, such as manufacturing, chemical processing and data centers. The integration of nuclear and coal systems optimizes resource allocation, with coal plants providing baseload power and SMRs supplying high-temperature heat for chemical processes. This synergy transforms coal-based facilities into versatile energy hubs, catering to diverse market demands and enhancing economic value.

Dual Use of Coal

The core innovation lies in leveraging coal's chemical composition for two purposes:

- **Electricity Generation:** Coal plants operate at full capacity, using their high carbon content to produce reliable electricity for the



By integrating advanced nuclear technology, this approach extends the operational life and economic viability of coal plants.

grid or nearby industries. Advanced combustion techniques, such as oxygen-firing, enhance efficiency by reducing nitrogen dilution and increasing heat output.

- **Synthetic Fuel Production:** Byproducts from coal combustion, primarily carbon-rich compounds, are captured and combined with hydrogen produced via SMRs. The Fischer-Tropsch process converts these inputs into liquid hydrocarbons, including aviation fuel, diesel and methane, tapping into high-demand markets.

This dual-purpose model maximizes coal's energy and economic potential, ensuring its relevance in modern energy systems.

Coal Power Complex: A Scalable Framework

The coal power complex integrates SMRs with standard coal plants, creating a scalable framework for the industry. This configuration sustains full-capacity electricity production, generates synthetic fuels and extends the operational life of coal plants, preserving capital investments. Designed for replication across existing infrastructure, it accommodates plants of varying sizes. By incorporating advanced combustion techniques and expanding coal generation capacity, the model pushes plants beyond traditional limits, creating opportunities for fuel and power production. This scalability ensures coal remains competitive, meeting diverse energy needs.

Nuclear-Coal Co-location: Maximizing Potential

Valar Atomics' vision enhances coal's utility through nuclear co-location in large-scale energy complexes. Key features include:

- Production of synthetic fuels using coal byproducts, positioning coal plants as significant contributors to fuel markets;
- On-site manufacturing of SMRs and nuclear fuel, ensuring self-sufficiency and scalability, with fuel designed for high efficiency and safety; and
- Support for co-located industries and grid power demands, expanding coal's role across energy sectors.

Advanced techniques, such as oxygen-firing, increase combustion efficiency and enhance byproduct yields for fuel synthesis, enabling plants to exceed traditional output and fostering economic growth and energy innovation.

Technological Foundation

Valar Atomics' approach relies on established technologies:

- **High-Temperature Gas-Cooled Reactors:** HTGRs provide high-temperature heat for hydrogen production and chemical synthesis, with prismatic designs offering safety and efficiency.
- **Thermochemical Hydrogen Production:** The sulfur-iodine cycle, validated at pilot scales, enables cost-effective hydrogen generation by leveraging high-temperature heat.
- **Fischer-Tropsch Process:** This catalytic method converts carbon monoxide and hydrogen into liquid hydrocarbons, optimized by coal's carbon-rich byproducts.

These technologies ensure the model's practicality and scalability, ready to transform the coal industry.

Economic Benefits and Industry Impact

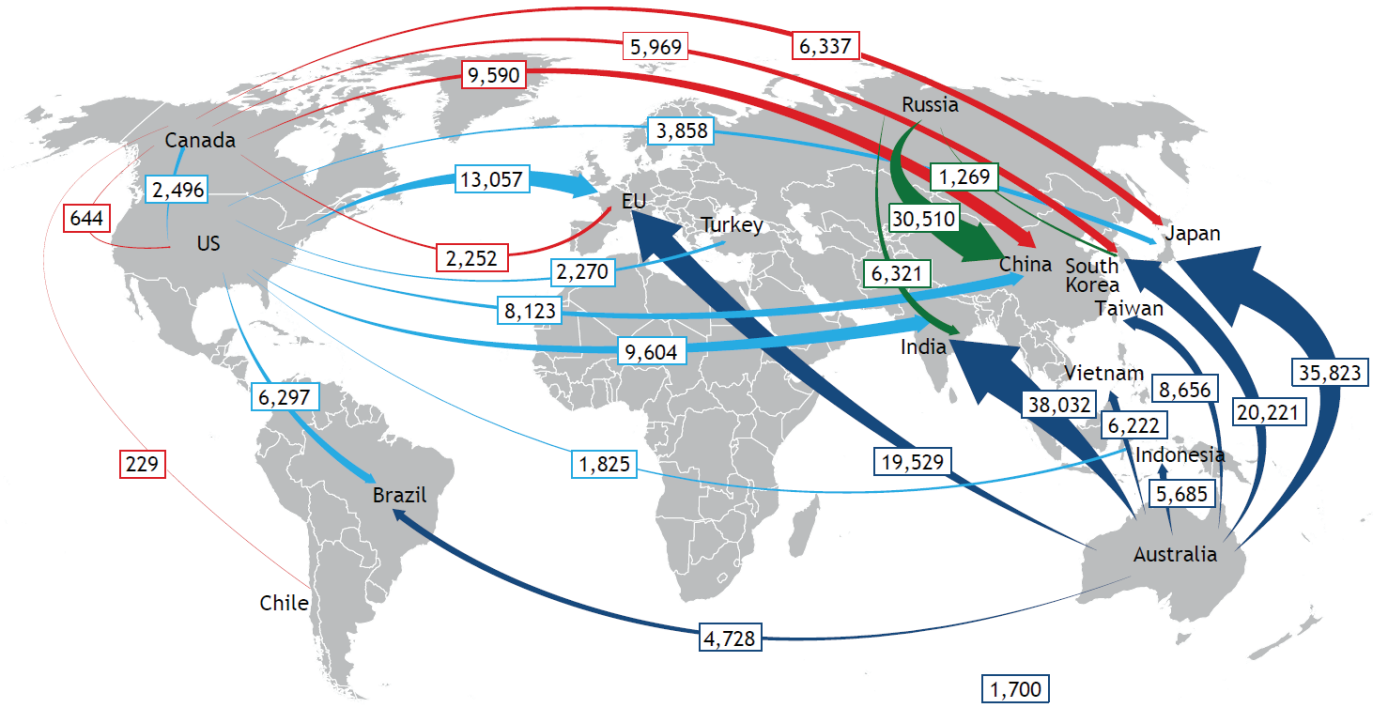
Valar Atomics' strategy delivers significant economic advantages:

- **Revenue Diversification:** Synthetic fuel production creates new income streams, with aviation and diesel markets driven by global transportation demands, complementing electricity sales.
- **Infrastructure Longevity:** SMR integration extends coal plant lifespans, avoiding costly decommissioning and preserving capital investments.
- **Job Creation:** Construction and operation of energy complexes generate high-skill jobs, from reactor manufacturing to fuel synthesis, with economic multiplier effects supporting local economies.
- **Market Expansion:** Supplying power, heat and fuels to co-located industries transforms coal plants into versatile energy hubs, enhancing their economic footprint.

By scaling this model globally, Valar Atomics strengthens coal's economic viability, ensuring sustained growth.

Valar Atomics' integration of coal and nuclear technologies redefines the coal industry's future. By leveraging coal's chemical composition for electricity and synthetic fuel production, this approach maximizes its value while extending infrastructure longevity. The synergy between coal and uranium, both reliable and energy-dense, underpins a model that transforms coal plants into versatile energy hubs. Through scalable energy complexes, Valar Atomics offers an economically compelling framework, ensuring coal remains a cornerstone of global energy production and delivering power, fuels and economic benefits for generations.





Coking Coal: 2024 Exports

It's Not Just the Tariffs The Met Coal Market's Health Depends on Many Factors

Siew Hua Seah, Senior Editor, Ferrous Markets, Argus Media

The U.S. and China's agreement to return import tariffs closer to the levels in place before President Donald Trump started his second term in office has no doubt brought relief across many commodity markets and U.S. businesses with strong ties to China. However, for the U.S. metallurgical coal market the easing of tariffs is just one of many factors that will determine the industry's health and sustainability.

U.S. metallurgical coal exports to China rose to a four-year high in 2024 at 8.12mn t, despite the challenging met coal price environment and mining firms operating at near cost or even at loss-making levels. The Argus-assessed fob Australia premium low-volatile (PLV) coking coal price fell from a peak of $336.65/t in January last year to a low of $176.50/t in September before ending the year at $197.65/t.

The fob Australia PLV price fell to a low so far this year of $166/t in late March before recovering and hovering around $190-200/t since then. The cfr China and cfr India markets followed a similar trajectory, as weak steel prices and softer demand globally weighed on the market. The presence of strong competition from lower cost producing countries such as Russia and Mongolia looking to ramp up sales to Asia added to the pressure on prices.

After nearly three months of disrupted trade and cargo diversions, most U.S. mining

and trading firms are treating any progress in tariff talks with caution and guarded optimism. "You never know which side of the bed the president is going to wake up on tomorrow," one U.S. trader said. Any recovery of trade flows to China will be welcomed but still viewed as a limited remedy for a U.S. met coal market that has struggled with seaborne prices that are close to cost for many and even loss-making for others.

The consistently challenging price environment over the past year has pushed many U.S. met coal producers to cut production plans. But some producers, such as Peabody and Warrior Met Coal for example, have continued to ramp up output.

"Some producers can cut back production to avoid the low prices but if the tight margins carry on into the longer term, it will have an impact on investment into mines and even the survival of higher producers," one Alabama-based producer said.

Asia as the Prize

In the Atlantic basin market, where U.S. met coal suppliers have a geographical advantage and are preferred over their Russian counterparts, European demand continues to slump, still feeling the effects of the disruptions caused in the COVID-19 years. The Brazilian steel industry – facing strong competition from imports – also lacks a sufficient presence in the spot market to sustainably support U.S. coal prices.

U.S. producers have instead carved out a sizable piece of the Asia-Pacific seaborne met coal market in the past five years, establishing themselves as a strong alternative, particularly during the years that China restricted Australian imports and as blast furnace capacity continues to grow in the region. India and China were the two largest destinations for U.S. met coal exports in 2024, with demand from India expected to remain strong this year.

Mongolian and Russian met coal exports are still rising and they compete for the same markets as U.S. exporters. Mongolia is targeting coal exports of at least 83mn t in 2025, with around 3/4 of this volume expected to be metallurgical grades. Proximity means that the world's largest steel producer, China, is a natural market, with Mongolia replacing Australia as the largest exporter of met coal to China since 2020.

Mongolia's exports are set to grow further, with the proposed Gashuunsukhait-Gantsmod cross-border railway from Mongolia's enormous Tavan Tolgoi reserves to China planned to double throughput capacity at Mongolia's dry ports to 165mn t/yr. India, which plans to grow crude steel production capacity to 300mn t/yr by 2030 from 180mn t/yr at present, has also expressed an interest in importing Mongolian coal by rail.

Russian met coal exports have continued to increase as well, rising by 5mn t to 30mn t/yr in 2024. In addition, Russian production benefits from much lower costs than in the U.S. Russian mining costs have risen in the past three years, but industry sources still peg the average production cost for open-pit mining in the Kuzbass region at $18.37-35.75/t,

US coking coal exports 2024			KT
Partner country	**2024**	**2023**	**±%y-o-y**
World	51,581	46343	11.3
India	9,604.0	8,400.0	14.3
China	8,123.0	4,846.0	67.6
Brazil	6,297.0	6,271.0	0.4
Netherlands	4,609.0	4,068.0	13.3
Japan	3,858.0	4,594.0	-16.0
Canada	2,496.0	3,372.0	-26.0
Turkey	2,270.0	1,387.0	63.7
Indonesia	1,825.0	566.0	222.4
Poland	1,211.0	1,441.0	-16.0
Germany	1,193.0	1,315.0	-9.3
			'-GTT

Canada coking coal exports 2023-24			'000t
	2024	2023	±%
Total	28,858	30,631	-6
China	9,590	8,476	13
Japan	6,337	7,662	-17
Korea	5,969	5,575	7
India	2,090	3,049	-31
Taiwan	1,380	1,385	0
Netherlands	741	1,277	-42
United States	644	646	0
Poland	592	615	-4
Germany	460	438	5
Sweden	374	306	22
			'-GTT

excluding value-added tax (VAT), while underground mining stands at $24.83-60.58/t, excluding VAT. Russian coal is also typically discounted to account for sanctions and difficulties with payments, and more recently the export duty on Russian coking coal was removed.

In comparison, lower cost longwall mining firms in the U.S. are indicating average sale costs of $110-112/short ton (st) in the first quarter of 2025, and others closer to $120-130/st. Smaller mining firms have also been in loss-making territory since last year, with their costs indications at $170-190/t or higher.

Closer to home, U.S. producers have long been in competition with Canadian suppliers in the Asia-Pacific as well. Canadian exporters have carved out a large slice of the northeast Asia market, supported by a not insignificant freight advantage over their U.S. counterparts to destinations such as Japan and China. But spot availability of Canadian mid-volatile coal appears to have risen since April, with market participants suggesting this has been the result of Asian buyers reducing their long-term contractual obligations in response to wider weakness in the ferrous complex. Price sentiment has weakened further since, as buyers confront an increase in supply availability.

While it is hard to deny that price is a key deciding factor in procurement, buyers also look to U.S. met coal as part of a diversification plan for supply security, along with the consistency and quality of coal that often comes with a more regulated sector. But these considerations are harder to prioritize in a weak steel market.

Buyers Not Feeling the Supply Squeeze

The market responded to a string of supply disruptions in Australia – at Anglo American's 5mn-6mn t/yr Moranbah North mine, Glencore's 11mn t/yr Oaky Creek and GM3's recently restarted 4.7mn t/yr Appin mine – with only a short-lived price rally in April. The suspension of work at the Liberty-operated 4mn t/yr Tahmoor mine in February, now pending a sale, was also treated with limited concern by buyers.

U.S. producers have been cutting production since last year, whether voluntarily or because of mining accidents, but the seaborne market continues to be largely unfazed. This is in no small part due to the alternative supplies still available to key buyers in Asia.

Some U.S. producers such as Alpha, Corsa and Ramaco have been signaling their dissatisfaction with prices by cutting production, but buyers are yet to show any concern. In the U.S., the fire-related closures of the Allegheny Met Longview mine in July and Core's Leer South mine in January failed to provide meaningful support to prices.

India is expected to lead in its share of U.S. coal receipts this year, but Indian buyers are also heavy consumers of Russian coal and are now eyeing Mongolian exports. The presence of strong and growing domestic production further dilutes the strength of U.S. producers in this market.

Developments in India over the past year have undermined

this market's potential to support U.S. met coal exports. A combination of general elections in the country and strong competition in the global steel market last year meant that Indian buyers were widely considered to have been able to push for lower prices from U.S. exporters.

Indian demand this year slowed to a crawl in May towards the end of the pre-monsoon restocking season, as uncertainty arrived in the form of escalating military tensions between India and Pakistan.

Japan is the third-largest importer of U.S. met coal. But in this fiscal year ending March 2026, Japan's major steel producers expect to reduce output, in part because of the U.S.'s 25% tariff on automobile imports curbing domestic car production.

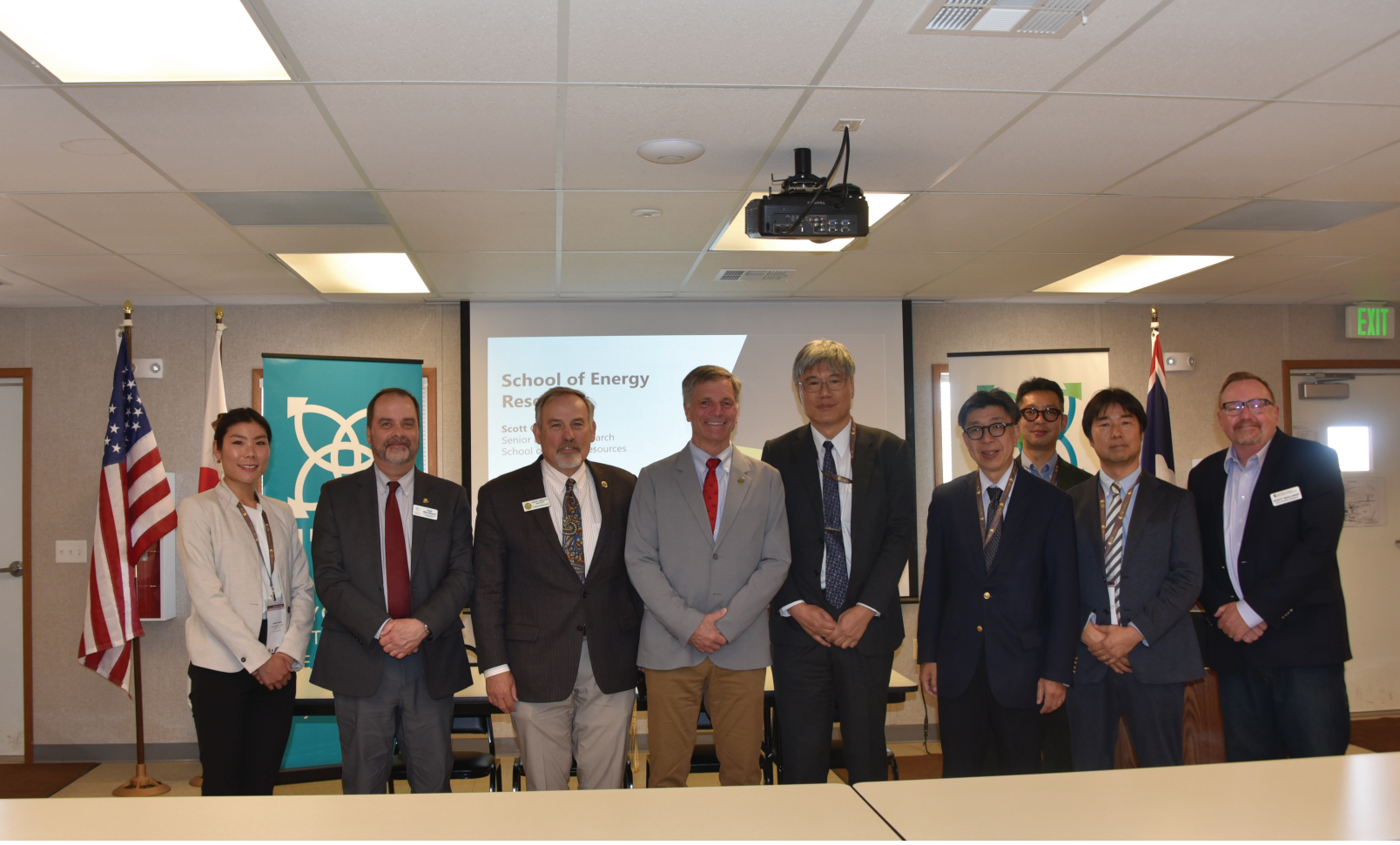
The country's two largest steelmakers, Nippon Steel and JFE Steel, project crude steel output at 33mn t and 21mn t, respectively, for April 2025-March 2026, both down by around 1mn t compared with a year earlier.

The U.S. tariffs could potentially reduce several hundred thousand tons of its Japanese steel product sales, given that 20% of Japanese domestic car production is exported to the U.S., JFE said. Nippon Steel also forecasts lower steel demand because of a possible fall in auto and machinery exports to the U.S. Japan's domestic steel demand has also been falling steadily over the past few years, with no immediate signs of a turnaround.

In Europe, with the first half of this year set to be a slow one for many steel mills operating at low utilization rates and facing weak steel demand, not many in the industry anticipate a meaningful recovery.

A U.S. administration that is willing to support and ensure the sustainability of domestic coal mines has provided a much-needed morale boost for the industry, but ultimately if seaborne prices continue to put pressure on margins or push producers into making losses, mining firms will need more to survive this current trough in the cycle.





Coal's Big, Bright Future It's a Matter of National Security

Mark Gordon, Governor of Wyoming

Attending the President's recent press conference on "Reinvigorating America's Beautiful Clean Coal Industry" provided me renewed hope in the future of our nation and my home state of Wyoming. Wyoming produces more coal than any other state and supplies 12 times more energy than we use. Regional and national collaboration with Wyoming will strengthen the nation's energy dominance.

Wyoming has championed coal for generations. Even before the President's executive orders were issued in April, the Wyoming Energy Authority (WEA) issued a request for proposals to produce a comprehensive study on the obstacles and opportunities for the expansion of our coal industry in the state, including export possibilities. WEA did this, not only for our economic interest, but for our country's geopolitical security and national defense.

Although America has many rivals, none is more menacing than China. China is quickly becoming a superpower. Among many efforts to expand its global influence, the Chinese government has outlined ambitious plans to

become a global leader in artificial intelligence by 2030. To power this effort, China started construction of 86,000 megawatts (MW) of coal generation in 2024 (equivalent to two major coal plants per week).

While China is reinforcing its energy security, America has recently implemented policies that resulted in an electricity shortage that threatens our national security. It's hard to imagine the U.S. declining when it comes to energy, given our abundant resources and leadership in technology. Many federal policies have injected ill-conceived and counterproductive anti-hydrocarbon ideology into environmental and energy policy, exposing over two-thirds of the U.S. to what the North American Electric Reliability Corporation (NERC) describes as a "high" or "elevated" risk of not having enough electricity to handle peak demand periods in the winter and summer. America must do better. We do not have to freeze in the dark to do better, either.

Over the past decade, some 175,000 MWs of dispatchable generation capacity was shut down, enough to power 110 million average-size homes. Currently, electric utilities have announced the closure of an additional 69,000 MWs of coal-fueled power capacity by 2032. Ironically, at this same time, the Federal Energy Regulatory Commission (FERC) estimates our electricity demand will grow by 78,000 MWs. FERC chairman Mark Christie said it best: "Power plants are retiring faster than they're being built. The arithmetic doesn't work."



For over a decade, governors from coal-producing states, like Wyoming, battled the federal government over coal's vital role in our nation's energy security. Not only did our efforts fall on deaf ears, but arbitrary federal regulations were implemented that drastically diminished the role coal was allowed to play to secure our energy future, stabilize our geopolitical security and, yes, improve emissions.

By treating energy supply as a matter of national security, President Donald Trump's executive orders recognize the central importance of coal and instruct the federal agencies to suspend, revise or rescind agency actions that unduly burden the energy industry. This first step was particularly helpful to Wyoming. As a state with 67% of its minerals (including coal) federally owned, lifting the ban on mining on federal lands is huge. The new executive orders focus on streamlining the *National Environmental Policy Act* (NEPA) and other permitting processes to reduce red tape, lower compliance costs and accelerate project timelines. All of this comes at a critical time in our history. Mining companies can return to what they do best – responsibly extracting valuable resources and caring for the land.

Equally important to addressing the supply side concerns of coal is the enhancement of the coal markets. I'm proud to say that in 2024, Wyoming supplied almost half of the nation's coal. The U.S. Energy Information Administration (EIA) states that Wyoming mined 191.5 million tons of coal which was shipped to 26 states and generated 313.5 million Mwh of electricity.

This is equivalent to the power needs of 34 million homes for a year. It seems odd that our use of this plentiful, dependable and inexpensive resource has declined decidedly over the past decade and for perhaps the most specious of reasons. In 2014, coal provided the fuel source for 50% of our nation's power needs – today it is below 20%.

To quote a friend, "Poverty has never been good for the environment." Yet federal policies have for too long restricted exports and domestic consumption in the power sector. Trump's executive orders lift those restrictions on several fronts. First, export restrictions are being relaxed, opening a way for American coal to help billions of our fellow global citizens lift themselves out of energy poverty. We still lack sufficient ports on the West Coast open to coal shipments. This remains a paramount issue standing in the way of getting cleaner, more carefully produced hydrocarbons to Pacific countries eager to secure dependable supplies of energy.

As a state with 67% of its minerals federally owned, lifting the ban on mining on federal lands is huge.

Meanwhile, on the domestic front, the President has instructed departments and agencies to implement common-sense environmental policies that offer welcome relief for consumers and workers across America. The President's recent orders direct the Secretary of Energy to use the full extent of his authority under the *Federal Power Act* to assess the growing power deficit and ensure that coal plays a central role in eliminating the shortage. These actions will properly position coal and our nation's grid to meet the necessary growth of our industrial sectors



that are so key to our nation's leadership in manufacturing and technology.

The challenge of meeting our growing appetite for energy is being supercharged by the demands of burgeoning digital infrastructure. It is the stuff we increasingly depend upon to lead the world in cloud computing, artificial intelligence and computer chip manufacturing. None of that is going away.

Trump has acknowledged the importance of coal for our national security and is addressing this problem on several fronts. By instituting common sense into our environmental policies and recognizing that the United States has the strictest air, waste and water regulations of any industrialized country, we are poised to lead the world in energy innovation. As Americans, we know how important our environment is and understand that innovation, not boneheaded retrograde regulation, provides us our best course forward.

Finally, the President is empowering the Department of Energy to invest in clean coal technologies. One such federal investment is Wyoming's carbon capture and storage facility at Dry Fork Station in Gillette.

All the President's efforts are having an immediate impact. Since Trump was elected, electric utilities have announced delays in closing 30 coal units, capable of producing over 30,000 MWs of electricity.

But the best is yet to come. Based on EIA data, only 43% of the capacity of existing coal-fueled power plants is being used. Many of these plants have operated at utilization rates greater than 70% in the past and could possibly return to a similar utilization rate. Tens of thousands of additional megawatts are available to meet growing demand if we can keep the plants maintained and in operation.



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If our nation tapped into the unused generating capacity from existing dispatchable generation, we could easily meet the estimated additional 78,000 MWs needed for peak demand in 2030.

We will need every watt of power we can generate from secure domestic resources like coal to retain our global leadership and keep our nation secure. As governor of the nation's most dominant coal-producing state, I will work with federal officials to quickly and decisively implement the administration's executive orders.

As our nation's security hangs in the balance, Wyoming's vast energy resources, hard-working coal miners and advanced research are poised to provide the solutions. I'm dedicated to this cause for the future of our state, our nation and the security of the world.

Governor Mark Gordon is known for his strategic positioning of an industry that will continue to help meet the needs of the nation's growing demand for energy. His fiscal acumen and economic savvy is evidenced in both his private and public sector endeavors. He served the people of Wyoming as state treasurer prior to being elected to two terms as their chief executive.

Coal is Cool Again! The Vibe Is Changing On Capitol Hill



STEVE READ
President,
Global Coal Sales Group, LLC

We had a great turnout for our 3rd annual ACC Washington D.C. fly-in. On May 5-8, Emily Arthun and 25 representatives of the American Coal Council descended on the Hill for a truly inspiring few days of discussions with our leaders who are working tirelessly for our industry to craft balanced and sensible energy policies for the future. We want to extend a big thank-you to Rusty Ashcraft and Dave Moss of North Star Strategies, LLC, and Savage Industries for their event sponsorship.

It was a great week to be in Washington, especially with the House Natural Resources Committee's reconciliation package passing out of committee while we were there, which included several sections giving key support to the coal industry. Coal is cool again! And we could definitely feel the vibe change on the Hill as we went from meeting to meeting. During the week, we had 22 advocacy meetings: nine with the House and 11 with the Senate, plus additional meetings with the House Natural Resources Committee and the Senate Energy and Natural Resources Committee. The participation of each person from this fantastic group of ACC representatives was crucial in making these meetings impactful.

While we had a lot of agenda items to discuss, our advocacy can be summed up in four key areas:

1. Unleashing American coal through right-sizing the federal coal royalty rate, supporting permitting and bonus bid reform to ensure the process is timely, reasonable and more common-sense based, plus putting an end to Biden-era federal coal leasing moratoriums;
2. Bolstering coal transportation with policies that focus on safe and reliable service without the one-size-fits-all approach and expanding America's coal exports through mutually beneficial bilateral trade agreements and a more robust export infrastructure, including bulk export facilities on America's West Coast;
3. Ensuring electrical grid reliability (more on that below); and
4. Promoting workforce development for American coal.



© Courtesy of Gabby Wiggins

Throughout the Biden administration, we have apparently been entirely content to blindly follow Germany and the rest of Europe (including Great Britain) right off the cliff when it comes to electricity reliability and affordability. If ever there was a wake-up call, it occurred on April 28 this year when massive blackouts hit Spain and Portugal, affecting millions and costing untold billions. At the time, more than 70% of Spain's electricity was coming from solar and wind. However, when renewable output plunged and interregional transmission was limited, the system collapsed. The incident revealed how an overdependence on renewables, without adequate baseload backup, can leave modern societies vulnerable to large-scale outages.

And now, with growing renewables and decreasing grid reliability in much of the United States, we are facing an unprecedented global explosion of digital infrastructure that is accelerating electricity demand in ways not seen before. Data centers, which power everything from cloud computing to artificial intelligence, are among the most energy-intensive facilities in operation today. Each one can use as much electricity as a small town, and thousands are being built to support the growing digital economy. These facilities require uninterrupted, high-output power, something that renewables cannot guarantee without massive battery storage, which remains expensive and limited in scale. Coal-fired power, with its reliability, cost competitiveness and high-capacity performance, is uniquely suited to support this critical digital infrastructure.

While China burns 30% more coal than the rest of the world combined (and growing), and its economic engine continues to run firmly on coal, in the U.S. we continue to retire coal-fired power plants at an unprecedented rate, threatening our grid stability and the global economic competitiveness upon which our country depends. In a nutshell, our message to Congress is: The time to act is now! We have what could be a short window right now to build common sense into our energy policies across the board which could pull our country back from the energy abyss that Europe faces.

All we ask for is a level playing field. Let us compete and we will win. As we all know, taxpayers heavily subsidize wind and solar. The (so-called) *Inflation Reduction Act* of 2022 extended these tax credits for an unprecedented 14 years (let that sink in!), allocating more than $370 billion in subsidies and incentives for "clean" energy over the next decade. These subsidies mask the true costs of renewable integration, including grid upgrades, energy storage and backup generation, often from fossil fuels.

The United States holds the largest coal reserves in the world, a strategic advantage that enhances energy independence and national security. Unlike renewables, which often rely on imported materials like rare earth metals and lithium for batteries, coal can be sourced, processed and consumed domestically. This makes the coal industry a vital and strategic asset in reducing reliance on volatile global markets and supply chains. Coal must remain a core part of a balanced, pragmatic energy strategy.

And remember: The time to act is now! Coal is cool!


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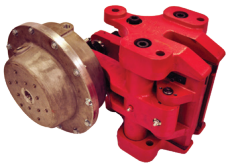



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