

# **FFF Carbon Coal Conference 2022**

## **Birds eye view of the SA inland coal market**

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# 1. Past to Present - General Overview

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- The impetus of the presentation will be to understand the challenges faced by end users/customers which are effectively our coal business
- Reviewing the last 48 months up to the current status of the inland coal business
- Changes in pricing, qualities, coal sizing
- Challenges faced by end users, logistics challenges etc.
- Overall instability of local coal supply

## **2. Future – Qualities, quantities, prices – Coal Cliff?**

- Have we reached the coal cliff?
- Looking forward at various aspects of the coal business
- Changes in qualities
- Future logistics challenges, rail and road
- General end user delivered costs
- Availability of coal in general, changes in qualities etc.

### **3. Export vs Inland – Prices, qualities and quantities**

- Previous attempts at inland vs export price parity?
- Lower qualities higher prices
- Major impact of export versus inland coal supply more now than ever

### **4. Traders & new entrants – Impact on the market**

- Issues created by inexperienced traders
- Quality problems, blending
- Inexperience in understanding coal applications
- End user procurement inexperience, problems created for end users etc.

## **5. Clean Coal Technologies**

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- Clean coal technologies
- Antiquated methods of coal processing
- Improving qualities and yields
- Pelletization and briquetting improvements
- Coal business must not be afraid too change

## **6. Cleaning up the SA coal image**

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- Creating a positive image of the coal business, getting it out to the SA public, understanding the importance of coal to the SA economy beyond Eskom
- New investment approach in the coal business
- End user participation investment