Expanding U.S. Coal Exports and Strengthening Global Market Positioning

United States Energy Association

BOTTOM LINE UP FRONT

The United States is one of the few countries able to supply export-grade coal, move it through extensive rail and barge networks, handle it through specialized terminal infrastructure, and deliver it to major overseas customers at commercial scale. That combination gives U.S. coal continued importance in global energy and industrial markets, particularly where buyers value reliability, quality, and supply diversity. These export streams support mining regions, port activity, and freight networks, while reinforcing America's role as a dependable supplier to allies and trading partners.

The current administration priortizes coal exports as part of a broader agenda centered on industrial competitiveness, energy security, and stronger U.S. trade positioning. In this policy context, a core challenge is whether the U.S. will strengthen and expand the full export chain that enables U.S. coal exports

THE EVOLUTION OF U.S. COAL EXPORTS

U.S. coal export volumes are cyclical, responding to global commodity prices, steel demand, energy-market conditions, and competition from other exporting nations. In 1981, U.S. coal exports totaled roughly 113 million short tons. From 2001-2010, annual U.S. coal exports averaged approximately 56 million short tons per year, well below the 1981 peak. In 2012, exports rose sharply and reached a new all-time high of approximately 125.7 million short tons, driven by strong foreign demand for both steam coal and metallurgical coal. During that time, approximately 75% of U.S. coal exports were going to Europe and Asia, with Europe slightly ahead overall even as Asian demand was increasing (U.S. Energy Information Administration (EIA) Today in Energy, November 15, 2012; EIA STEO March 2013).

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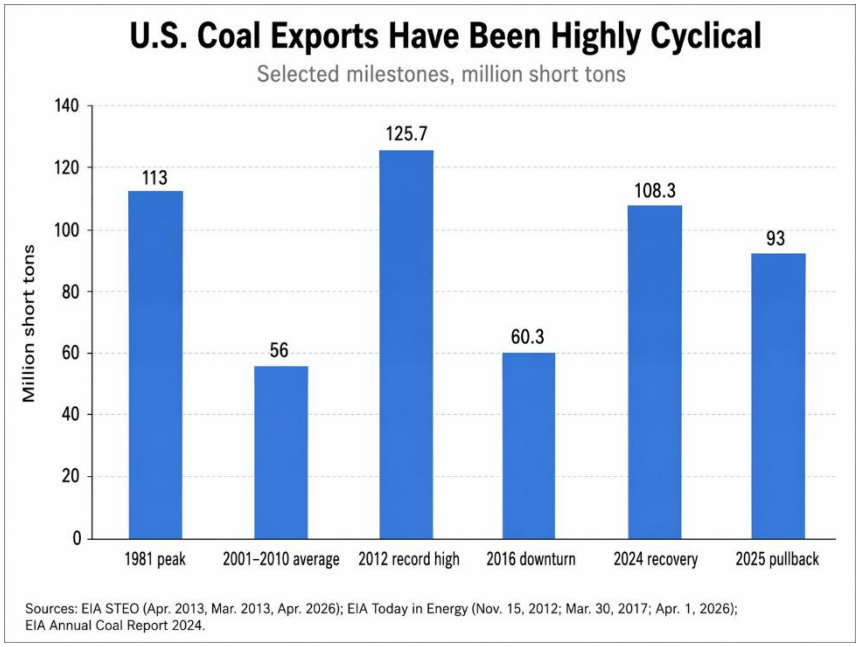
By 2016, U.S. coal exports had fallen to about 60.3 million short tons, reflecting weaker global demand and tougher competition from other major suppliers such as Australia, Indonesia, Russia, Colombia, and South Africa (EIA Today in Energy, March 30, 2017). More recently, exports recovered again. EIA reports that U.S. coal exports rose to 108.3 million short tons in 2024, before falling back to about 93 million short tons in 2025, a decline of roughly 16 million short tons after four consecutive years of growth (EIA Annual Coal Report 2024; EIA Today in Energy, April 1, 2026).



The 2025 decline was not just a routine cyclical pullback. Much of the decline was driven by a collapse in shipments to China. U.S. coal exports to China fell 92% between 2024 and 2025 after China imposed additional tariffs on U.S. coal imports in 2025. EIA also points to a weaker global market, with ample supply and soft demand pushing prices down and making exports less profitable for U.S. sellers. At the same time, stronger domestic coal use absorbed more supply at home, reducing export volumes after four straight years of growth.

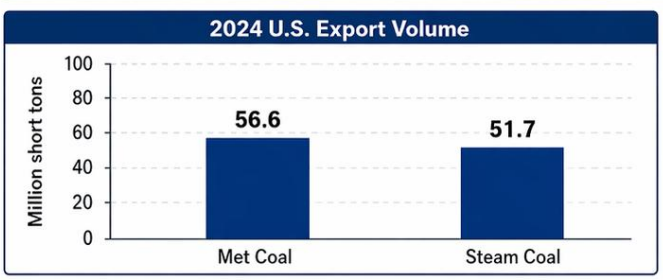
U.S. COAL EXPORTS: METALLURGICAL AND STEAM COAL

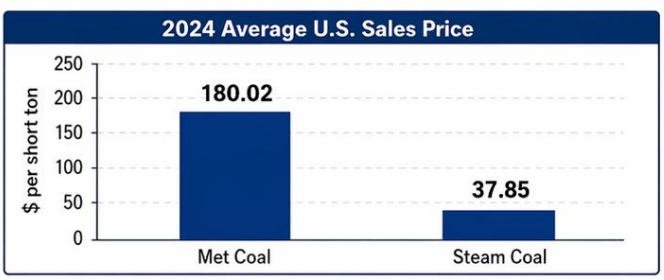
The United States exports two distinct coal products: metallurgical coal, used primarily in steelmaking, and steam coal, used for electric power generation and industrial heat. In tonnage terms, the two export streams were nearly balanced in 2024: 56.6 million short tons of metallurgical coal and 51.7 million short tons of steam coal. Economically, however, metallurgical coal carries much greater weight because it sells at a substantially higher price. EIA reports that the average 2024 sales price of U.S. metallurgical coal was $180.02 per short ton, compared with $37.85 per short ton for thermal coal. That value gap explains why metallurgical coal is the value anchor of U.S. coal exports, even when steam coal accounts for a comparable share of export volume. In 2025, both categories declined, with steam coal exports falling by about 18% and metallurgical coal exports by about 11%. The overall profile is therefore two-part: metallurgical coal provides the higher-value foundation of the export business, while steam coal remains an important but more price-sensitive and cyclical trade.

U.S. Metallurgical Coal vs. Steam Coal

Key differences in use, market role, and recent U.S. export performance

	Metallurgical Coal (Met Coal)	Steam Coal (Thermal Coal)
Primary use	Steelmaking (converted to coke for blast furnaces)	Electric power generation; some industrial heat and combined heat and power
Also called	Coking coal	Thermal coal
Main customers	Steel producers	Utilities and industrial users
Key demand driver	Global steel production	Power demand, fuel competition, and delivered cost
Typical U.S. export role	Higher-value, strategic export	More price-sensitive, opportunistic export
Main U.S. export base	Primarily Appalachia	Broader supply base; exports depend heavily on delivered-cost competitiveness
2024 U.S. export volume	56.6 million short tons	51.7 million short tons
2024 average U.S. sales price	$180.02 per short ton	$37.85 per short ton
2025 trend	Down 11%	Down 18%





Policy takeaway

Metallurgical coal is the United States' higher-value, steel-linked export segment, while steam coal remains more exposed to power-market conditions and global price competition.

Source: United States Energy Association (USEA) analysis and visualization based on data from the U.S. Energy Information Administration (EIA), *Annual Coal Report 2024*; *Today in Energy* (Apr. 1, 2026); and *Energy Explained*.

U.S. EXPORT COAL: REGIONAL SUPPLY BASE

U.S. coal production is generally grouped into three major regions: Appalachia, the Interior, and the West. In 2024, Western-region coal production totaled about 271.1 million short tons, including about 190.7 million short tons from Wyoming alone. Export coal, however, is not sourced evenly across those regions. Export volumes are concentrated more heavily in Appalachia and the Interior than in the West. According to EIA's 2024 foreign-distribution data, West Virginia alone accounted for about 44.1 million short tons of U.S. coal exports. Other major exporting states included Illinois at about 14.0 million short tons, Alabama at about 13.1 million short tons, Virginia at about 9.5 million short tons, and Pennsylvania at about 8.8 million short tons.

This regional pattern reflects both coal quality and transportation economics. Appalachian coal (especially from Central and Northern Appalachia) is particularly well suited to the metallurgical export market and benefits from relatively direct access to major East Coast export terminals. Interior-region coal, including output from the Illinois Basin, also contributes materially to export

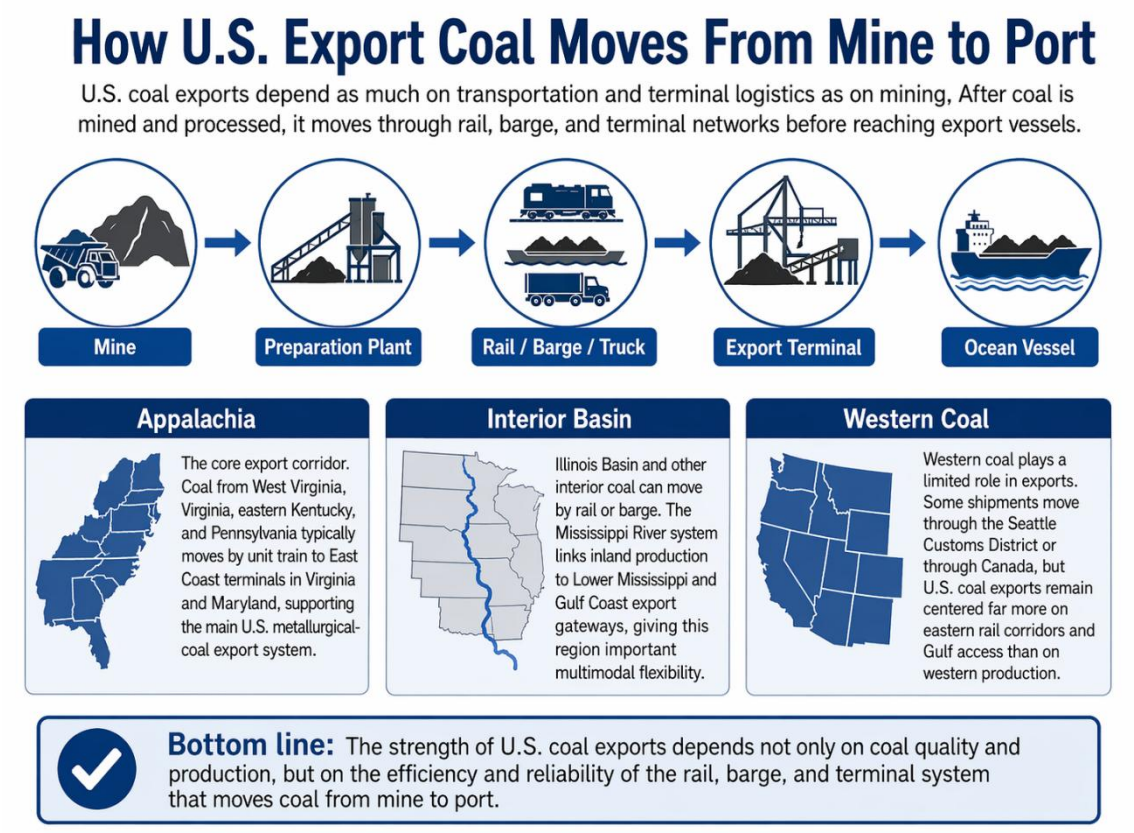
flows where transportation links support competitive delivery to export outlets. By contrast, Western coal, including Powder River Basin production, is overwhelmingly more important to the domestic market than to the export trade. Although the West remained the nation's largest coal-producing region in 2024, export origin data show that U.S. coal exports were concentrated far more heavily in Appalachian and Interior states than in the West.

WESTERN AND TRIBAL COAL EXPORTS: RESOURCE STRENGTH MEETS MARKET-ACCESS CONSTRAINTS

Western coal illustrates one of the central limits of U.S. coal export growth: a large resource base does not automatically translate into export capacity. The western United States remains the country's largest coal-producing region, and Wyoming alone accounted for about 190.7 million short tons of 2024 coal shipments. Yet the U.S. coal export system remains overwhelmingly oriented toward East Coast and Gulf Coast gateways, not Pacific outlets. EIA reports that from 2021 through 2025, 62% of U.S. coal exports moved through Norfolk and Baltimore, another 25% through Mobile and New Orleans, and only about 8% through the West Coast, primarily Seattle-linked movements to Canadian ports. For metallurgical coal, the concentration was even sharper: 94% moved through the same four East and Gulf Coast ports, with Lambert Point alone accounting for roughly 58% of U.S. metallurgical coal exports. For policy purposes, the western and Tribal coal export question is therefore best understood as a market-access issue. The resource exists. The challenge is whether the United States can support export pathways that are commercially bankable, legally durable, environmentally reviewable, and respectful of Tribal sovereignty across the full route from mine to tidewater.

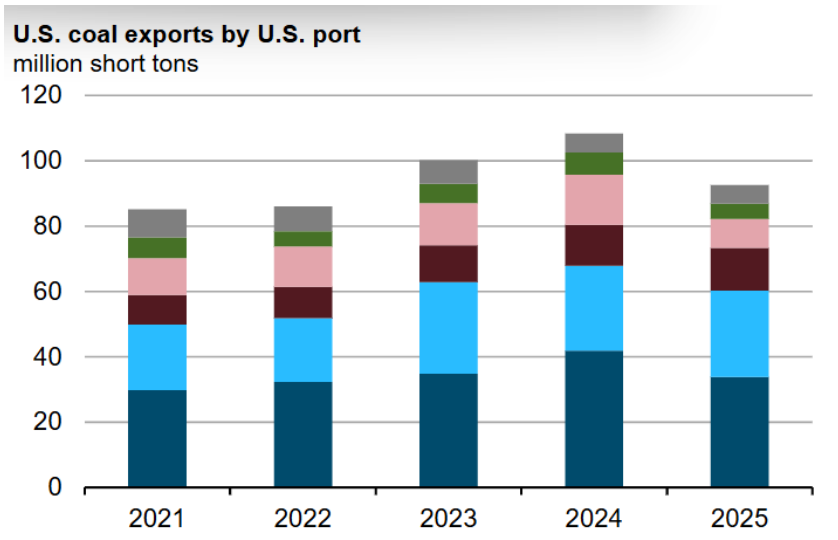
FROM MINE TO PORT: HOW COAL REACHES EXPORT TERMINALS

U.S. coal exports depend as much on transportation and terminal logistics as on mining itself. After coal is mined and processed, it moves through a network of rail lines, barges, trucks, and export terminals before reaching overseas buyers. Rail is the backbone of this system, carrying nearly 70% of U.S. coal deliveries for at least part of the journey. Export flows vary by region: Appalachian coal, especially metallurgical coal, typically moves by unit train to East Coast terminals in Virginia and Maryland; Interior Basin coal can move by either rail or barge through the Mississippi River system to Gulf Coast gateways; and Western coal plays only a limited export role. The broader takeaway is clear: U.S. coal exports are not just a mining story, but a logistics story, with eastern rail corridors and Gulf-access networks forming the core of the export system.



PORTS, EXPORT TERMINALS, AND SHIPPING NETWORKS

Coal export terminals are far more than transfer points between rail and ship. They are complex industrial logistics platforms designed to receive coal from railcars or barges, unload and weigh it, sample and verify quality, manage stockpiles, blend cargoes to customer specifications, and reclaim and load coal efficiently into large dry-bulk vessels. In practice, export competitiveness depends not only on mine output, but on the speed, reliability, and cost-effectiveness of the handling chain from the mine gate to the ship's hold.



Source: U.S. Energy Information Administration (EIA), "U.S. coal exports decreased in 2025 after four years of growth," Today in Energy, April 1, 2026. Chart: "U.S. coal exports by U.S. port." Data source: U.S. Census Bureau.

The U.S. coal export system is highly concentrated. From 2021 through 2025, just four ports (Norfolk, Baltimore, Mobile, and New Orleans) handled the great majority of U.S. coal exports. Norfolk/Hampton Roads is the country's most important metallurgical coal gateway, with Lamberts Point alone accounting for roughly 58% of U.S. metallurgical coal exports over that period. Lamberts Point remains especially significant because of its scale, high-throughput rail-to-vessel operations, and coal blending capabilities. Baltimore is another critical Atlantic outlet, particularly because of its proximity to northern Appalachian coal fields, while Mobile and New Orleans provide major Gulf Coast export channels for coal moving out of the Interior and other producing regions.

U.S. coal exports move primarily on dry-bulk carriers, especially Panamax and Capesize vessels, which makes vessel size, channel depth, berth capacity, and loading speed central to delivered cost. This concentration creates operating efficiency, but it also exposes the system to disruption when a major export node is impaired. The 2024 interruption following the Francis Scott Key Bridge collapse in Baltimore illustrated that risk clearly: even a temporary loss of access at one major port was enough to disrupt shipments and tighten near-term export logistics. Global competitiveness of U.S. coal depends not only on coal quality and mine supply, but also on resilient terminals, efficient port operations, and shipping access.

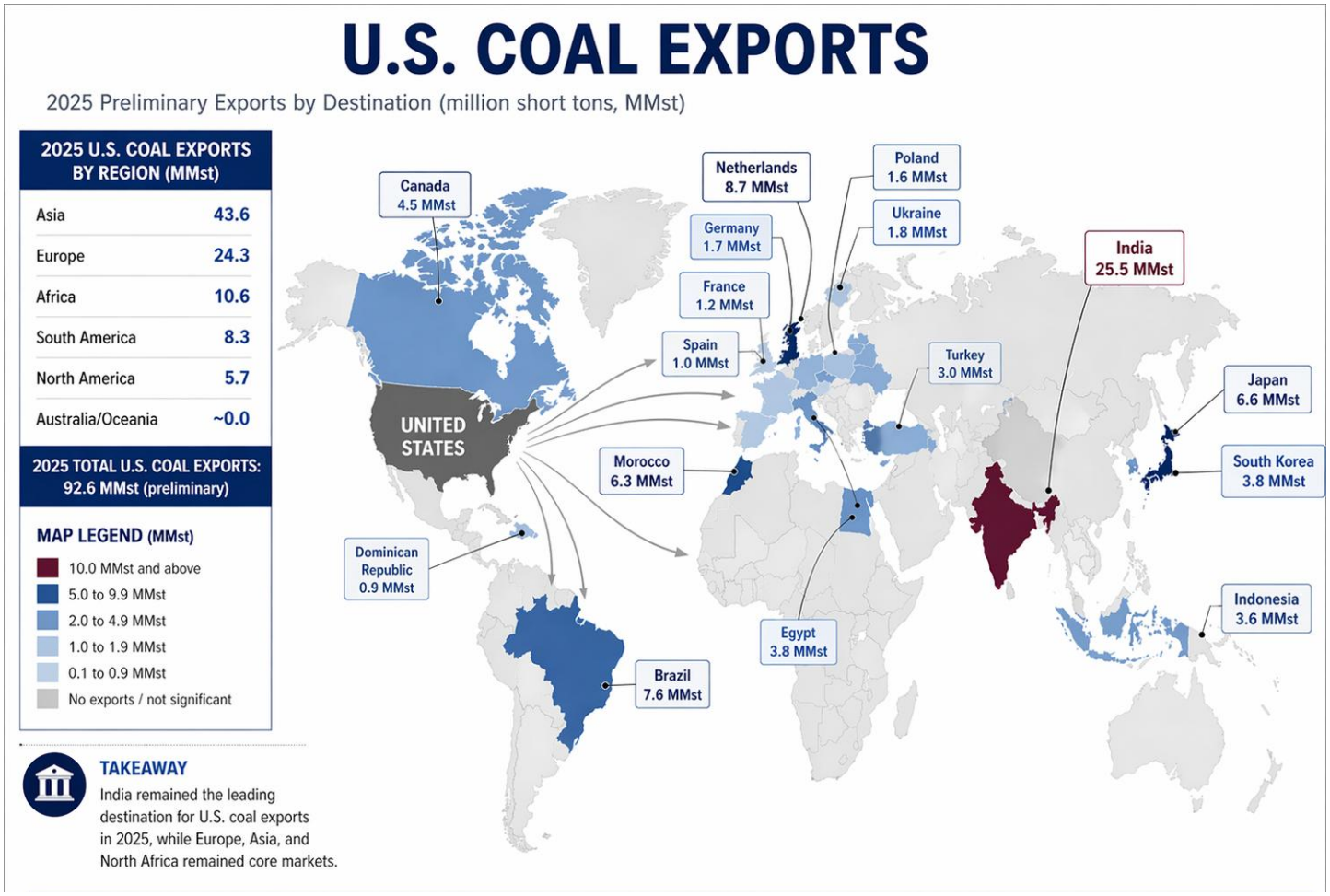
AMERICA'S COAL EXPORT MARKETS

In 2025, U.S. coal exports remained geographically diverse, but trade flows were concentrated in a relatively small number of major markets. Asia was the leading regional destination at 43.6 million short tons, driven primarily by India, which alone took 25.5 million short tons. Europe followed at 24.3 million short tons, with the Netherlands as the largest named European destination at 8.0 million short tons. Africa absorbed 10.6 million short tons, led by Morocco at 6.3 million short tons and Egypt at 3.8 million short tons. Brazil remained the largest South American market at 8.4 million short tons, while Japan, South Korea, Indonesia, Turkey, and Canada also remained important outlets. The 2025 destination mix therefore reflected both diversification across regions and meaningful concentration in a handful of large country markets, particularly India.

FEDERAL EFFORTS TO STRENGTHEN U.S. COAL EXPORTS

Federal efforts to strengthen U.S. coal exports have become markedly more explicit under the current administration. The clearest policy signal came on April 8, 2025, when the White House issued the executive order *"Reinvigorating America's Beautiful Clean Coal Industry."* The order states that it is U.S. policy to support the domestic coal industry by removing federal barriers that undermine coal production, encouraging coal utilization, and "increasing American coal exports." That language matters because it moves export promotion from an implied benefit of broader coal support to an expressed federal objective.

A second major signal has come through trade diplomacy. In the February 2026 U.S.-India joint statement, India said it intends to purchase $500 billion of U.S. energy products, aircraft and aircraft parts, precious metals, technology products, and coking coal over the next five years. A White House fact sheet issued shortly thereafter similarly said India intends to purchase more than $500 billion of U.S. energy, information and communication technology, coal, and other products. This is an important strategic and commercial signal for U.S. exporters, particularly because India is already one of the most important markets for U.S. metallurgical coal.



Source: United States Energy Association (USEA) visualization using data from the U.S. Energy Information Administration (EIA), *Quarterly Coal Report*, October-December 2025, Table 7.

The administration has also reinforced a broader coal-growth agenda through the Department of Energy. In March 2026, DOE's Hydrocarbons and Geothermal Energy Office described its regional coal workshops, organized by the United States Energy Association, as part of an effort to "stabilize, optimize, and grow" the American coal industry and said the workshops examined opportunities, barriers, and potential solutions for increasing U.S. coal exports. DOE's Office of Coal likewise states that it supports research, development, and demonstration across the coal value chain and seeks to generate opportunities for new export markets for coal-derived products. In September 2025, DOE also announced a $625 million package to reinvigorate and expand

America's coal industry, including coal recommissioning and modernization, rural capacity and affordability projects, and related investment intended to strengthen coal-region energy infrastructure. These measures are not export subsidies in the narrow sense, but they do reinforce the industrial base, operating environment, and market confidence that underpin U.S. coal export capacity.

Recent federal actions have strengthened that signal further by tying coal more directly to national security and grid resilience. In February 2026, the White House issued an executive order on strengthening national defense with America's coal power generation fleet, and in April 2026 it followed with a Presidential Determination under Section 303 of the Defense Production Act finding that reliable coal supply chains and baseload power generation capacity are essential to U.S. national defense. That same broader posture has extended to regulation: in February 2026, EPA finalized the repeal of the 2024 Mercury and Air Toxics Standards amendments for coal- and oil-fired power plants. Taken together, these actions suggest that federal coal policy is being framed not only around domestic reliability and industrial capacity, but also around preserving and expanding the commercial foundations of U.S. coal trade, including exports.

PRIVATE-SECTOR ACTIONS TO STRENGTHEN COAL EXPORTS

Industry is not waiting on Washington alone. Export-oriented businesses are investing in terminal capacity, handling equipment, operational efficiency, and logistics resilience. At the Port of Mobile, the Alabama Port Authority says the McDuffie Coal Terminal is in the midst of a multi-year $200 million modernization program designed to improve coal-handling performance and support future tonnage growth. In late 2024, the authority awarded a $63.1 million contract for two new stacker-reclaimers, and by January 2026 port leadership said the broader modernization effort was intended to expand capacity and improve service. Norfolk Southern continues to market Lamberts Point as the largest, fastest, and most efficient coal transloading facility in the Northern Hemisphere, with 48 million tons of annual throughput capacity and the ability to load two vessels simultaneously at up to 8,000 tons per hour combined. That scale is itself a competitive asset: it can reduce handling costs, improve vessel turnaround, and help U.S. suppliers compete against exporters with shorter transport distances or lower mining costs. CSX, meanwhile, highlighted both recovery and continuity planning at Baltimore's Curtis Bay coal facility after the 2024 Francis Scott Key Bridge collapse. The company described Curtis Bay as one of its largest export coal facilities and said the port closure posed a significant challenge for customers, while later noting that maintenance and

Image 1. McDuffie Coal Terminal at the Port of Mobile, Alabama. Source: Alabama Port Authority, Coal, Port of Mobile Facilities

recovery work during the disruption increased the site's resilience. The broader business lesson is clear: export competitiveness depends not only on throughput and loading speed, but also on the ability of the system to withstand and recover from disruptions at major nodes.

KEY RISKS AND CONSTRAINTS

A more export-oriented U.S. coal strategy still faces real constraints. Competition remains intense from Australia, Indonesia, Colombia, South Africa, Canada, and (depending on sanctions and market conditions) Russia. Export volumes are also exposed to foreign industrial slowdowns, shipping costs, and domestic infrastructure disruptions. The 2024 Baltimore disruption showed how quickly one chokepoint can affect national export flows. The administration can help the industry by easing regulations, promoting coal in trade diplomacy, and backing coal infrastructure and research, development and demonstration. But it cannot by itself guarantee foreign demand.

CONCLUSION

U.S. coal exports remain a strategic asset rooted in American resource strength, industrial capability, and trade reach. Supported by high-quality reserves, established export infrastructure, and demand in global steel and power markets, they align with the administration's broader effort to reduce barriers to coal development, strengthen industrial competitiveness, and expand U.S. energy influence abroad. The strongest long-term opportunity lies in metallurgical coal, especially in growth markets such as India, while steam coal continues to offer targeted openings where U.S. supply remains competitive on cost and reliability. Looking further ahead, EIA's Annual Energy Outlook 2026 projects that U.S. coal produced for export rises from 96 million short tons in 2025 to 115 million short tons in 2050 across the cases it examined, assuming no restrictions on global coal trade, even as domestic metallurgical coal use declines as electric arc furnaces increasingly replace blast furnaces and basic oxygen furnaces in steelmaking. In the end, export success will depend not just on what the United States can mine, but on what it can move, load, and deliver efficiently to world markets.

THE UNITED STATES ENERGY ASSOCIATION (USEA) Founded in 1924, USEA is a nonprofit, nonpartisan, and non-lobbying organization that serves as a neutral forum for dialogue across the global energy sector. USEA's mission rests on two pillars: first, convening stakeholders to exchange insights on policy, regulation, science, technology, and finance to advance reliable, affordable energy for economic growth and prosperity; and second, partnering with the U.S. government, members, and international allies to expand access to U.S. energy resources and technology to strengthen energy security worldwide. Through its ability to connect utilities, technology companies, policymakers, government agencies, and research institutions, USEA provides a platform for informed discussion, actionable insight, and partnership on the energy issues shaping America's future.

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IMAGE SOURCES

Image 1. McDuffie Coal Terminal at the Port of Mobile, Alabama
Alabama Port Authority. Coal. Port of Mobile Facilities
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