



U.S. COAL INDUSTRY UPDATE

THE PATH FORWARD FOR COAL

Janet Gellici, National Coal Council

U.S.-China Clean Coal Industry Forum

Morgantown, WV – November 30, 2017

National Coal Council



Celebrating 33 years – 1984 | 2017

**The National Coal Council
provides advice and recommendations
to the Secretary of Energy
on general policy matters
relating to coal and the coal industry.**

**NCC is a Federal Advisory Committee
organized under Federal Advisory Committee Act (FACA) legislation**

Members

Appointed by Secretary of Energy to serve 2-year terms
125-150 members

- **Industry**

- Coal Suppliers
- Utility & Industrial Consumers
- Coal Transportation

- **Support Services**

- Engineering Firms
- Technology Developers
- Consultants
- Attorneys

- **Academics**

- **NGOs**

- Environmental Groups
- Trade Association Managers

- **Government**

- Public Utility Commissioners
- State Energy Officials

Reports

~ 35 reports prepared by NCC members at no cost to DOE

Extensive Range of Report Topics:

Carbon Management
Clean Coal Technologies
Coal & Coal Technology Exports
Coal Conversion
Utility Deregulation
Climate & Clean Air Regulations
Enhancing Coal's Image

Building New Coal Power Plants
Industrial Coal Use
CCUS for EOR
Value of Existing Coal Fleet
Advancing CCS Technologies
Policy Parity for CCS
CO₂ Utilization

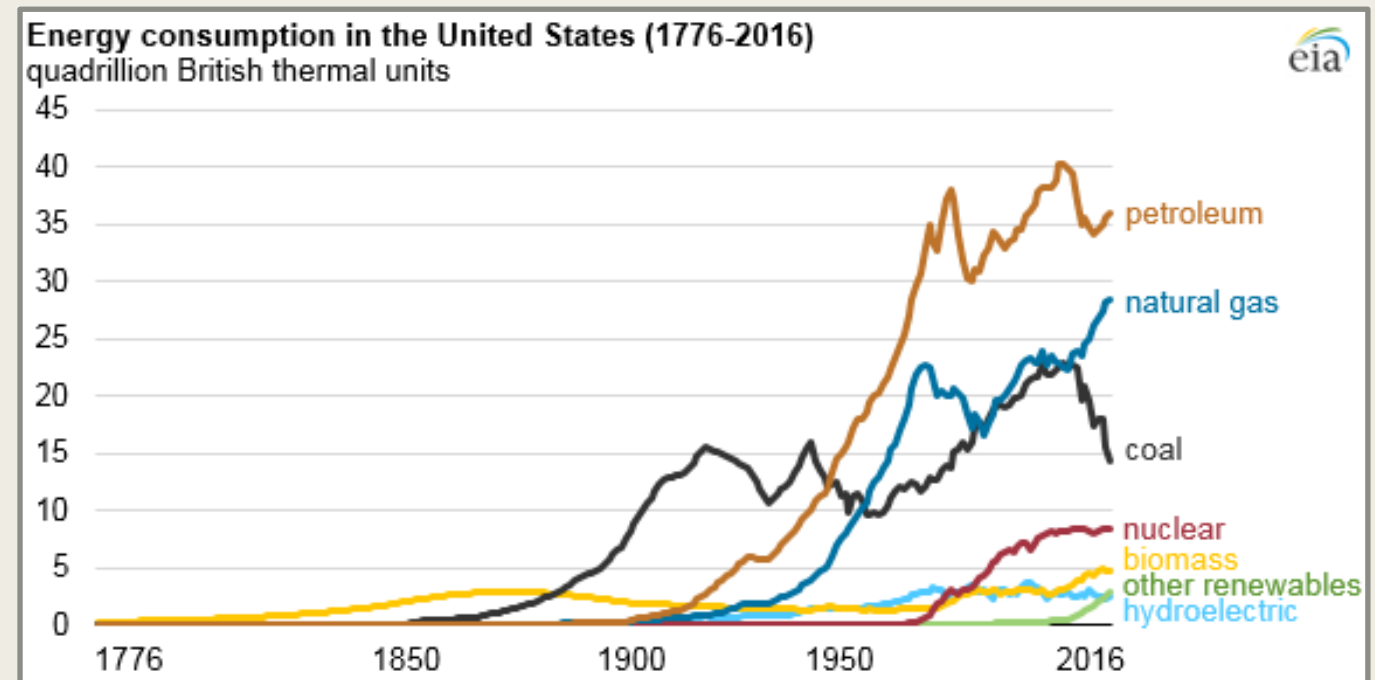
Presentation Overview

- U.S. Coal Sector Current Status
- U.S. Administration Priorities
- The Path Forward: U.S. Industry Priorities

U.S. Coal Status - Overview

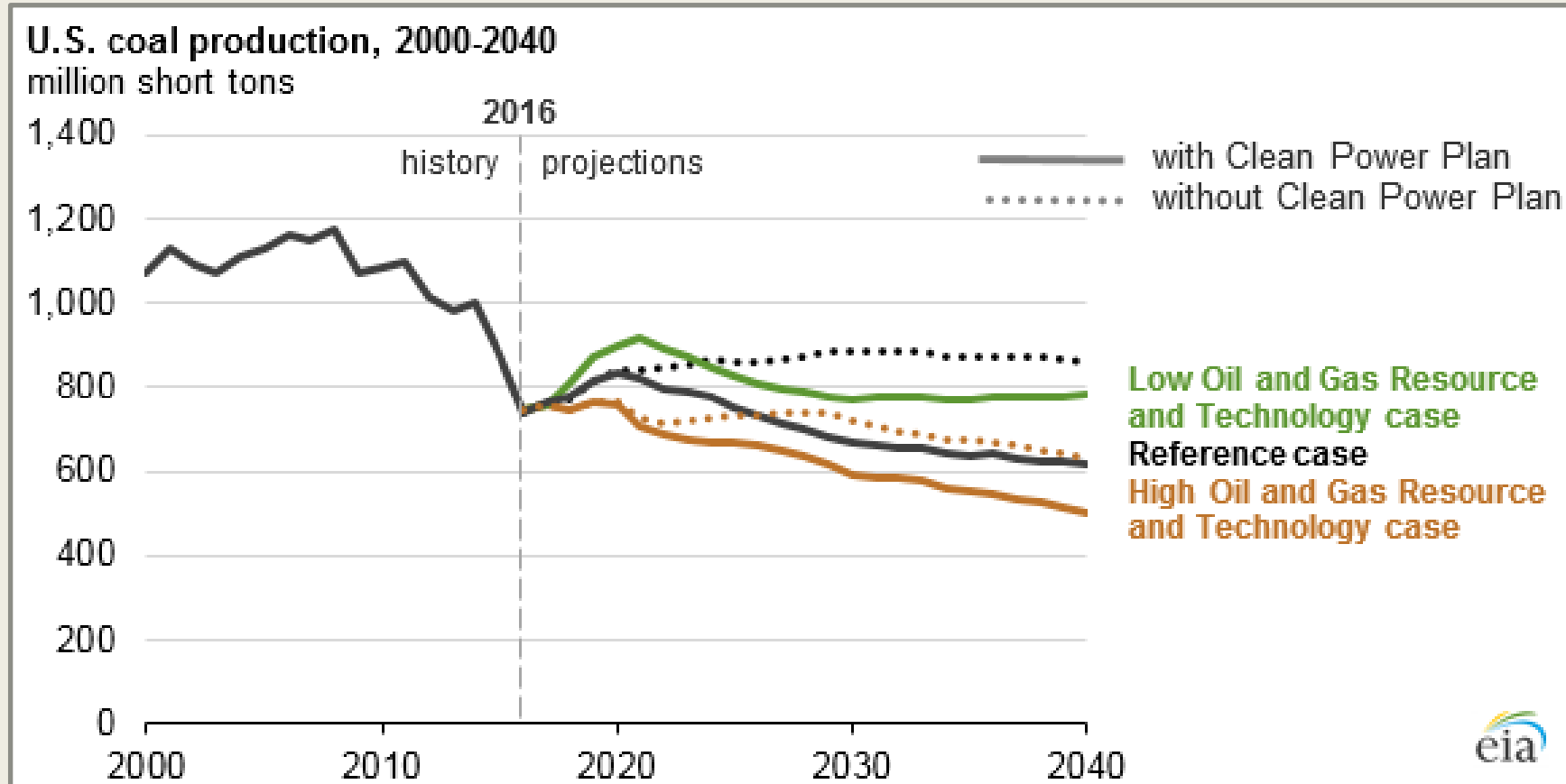


- Multiple Disruptive Factors
 - *Market Demand*
 - *Competitive Markets*
 - *Technology*
 - *Policy*



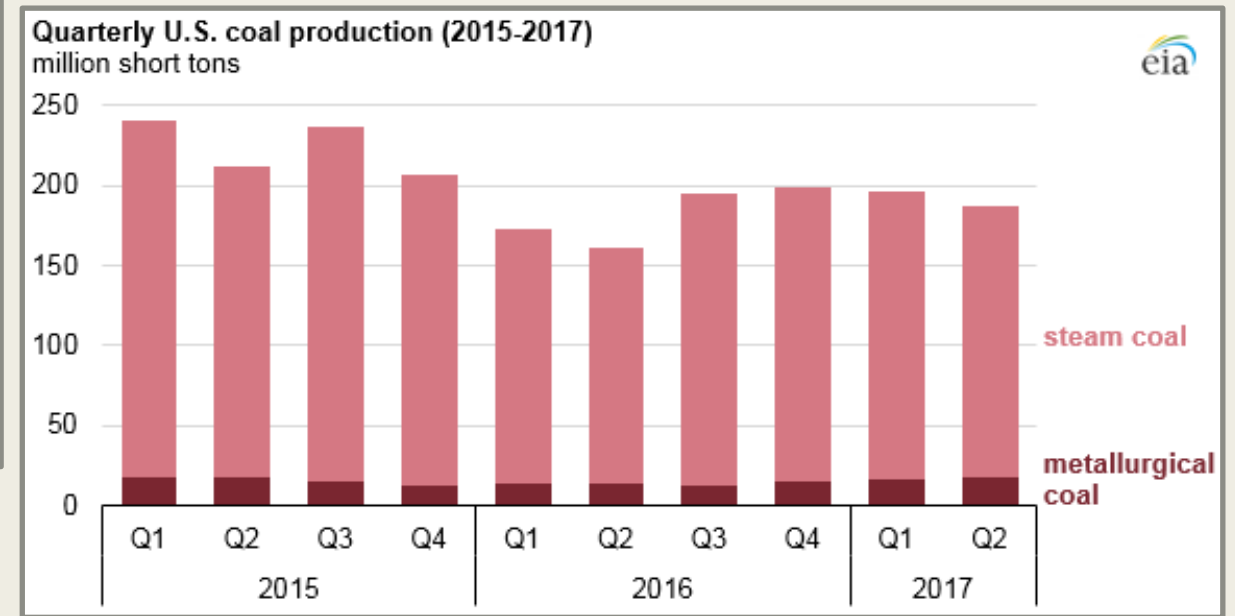
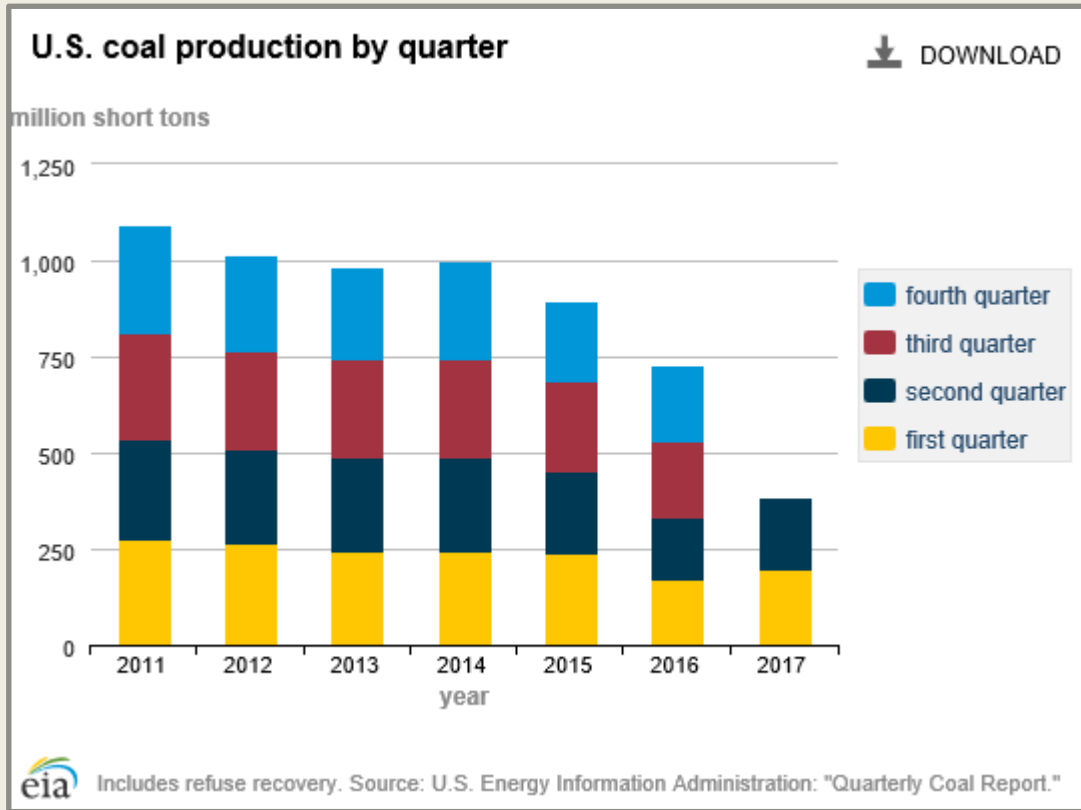
Source: US EIA Monthly Energy Review

U.S. Coal Status - Policy

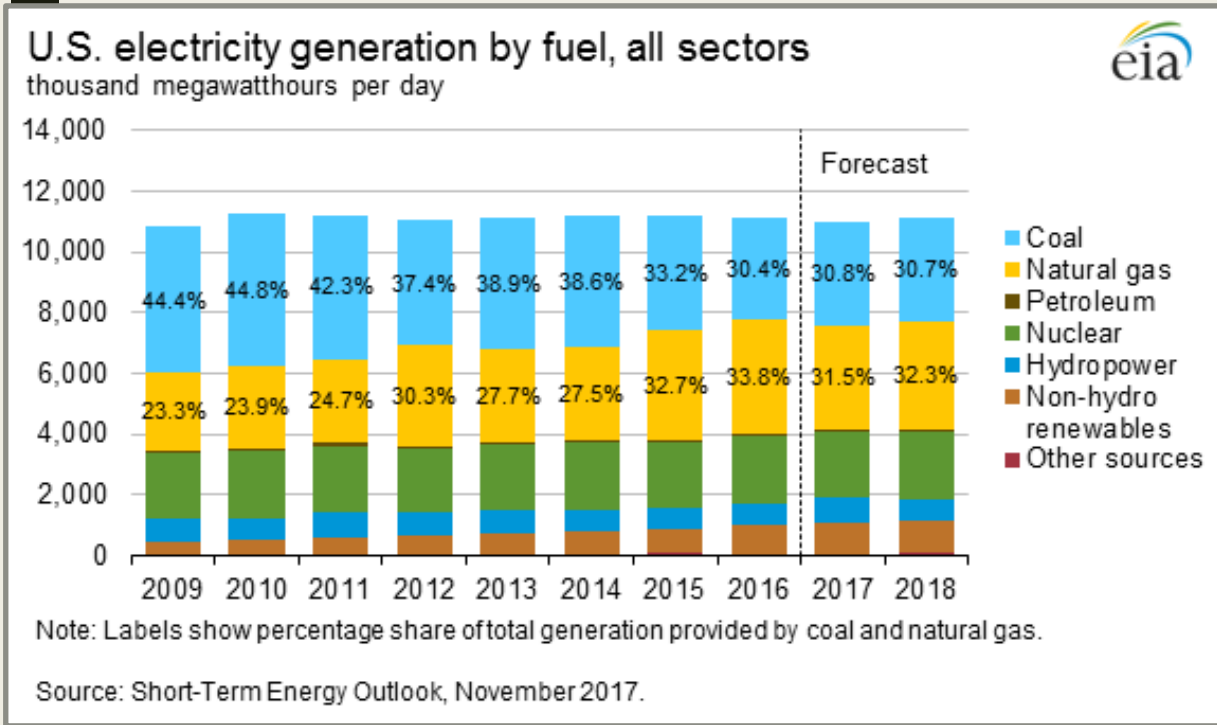


Source: EIA AEO 2017

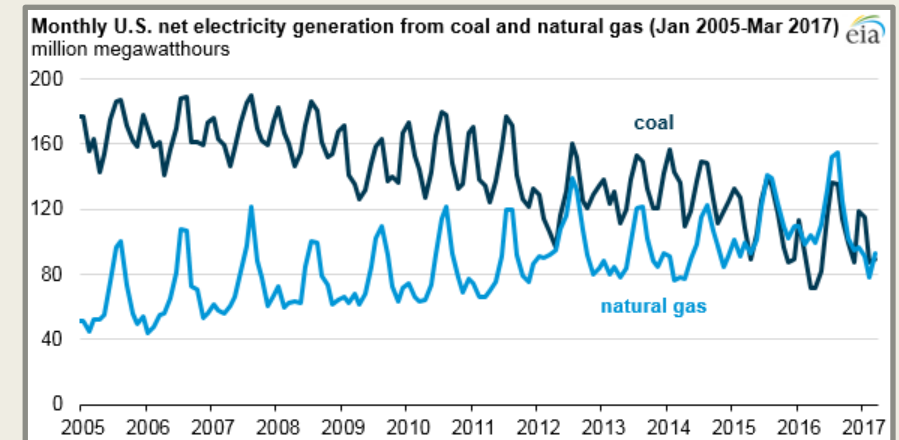
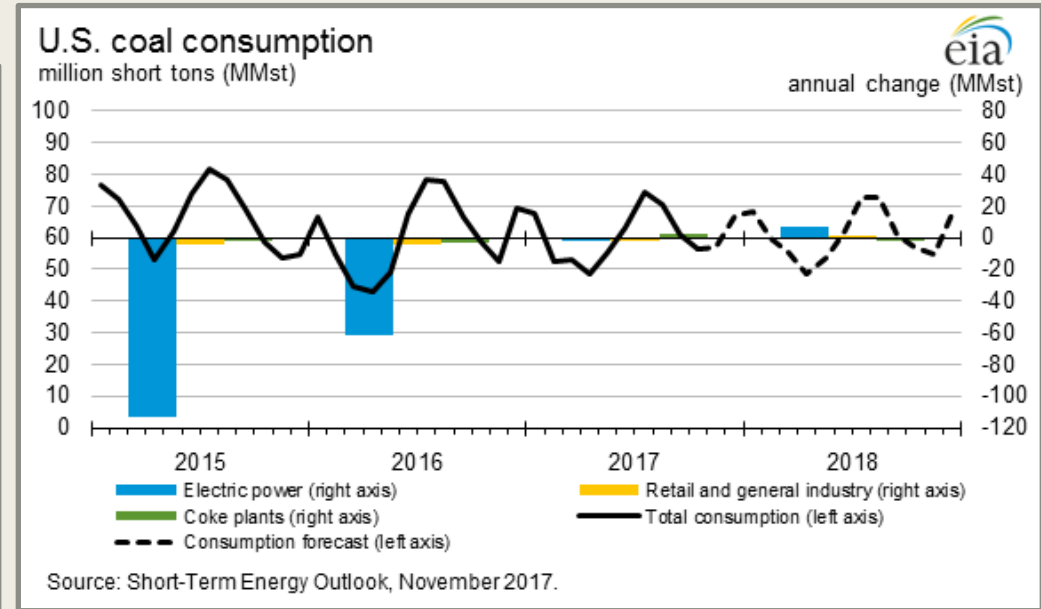
U.S. Coal Status - Production



U.S. Coal Status - Consumption

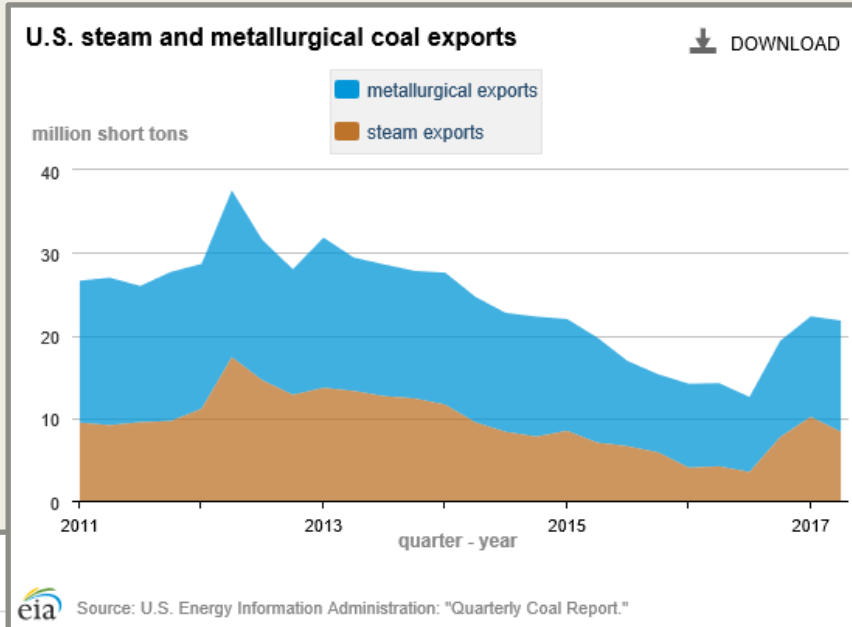


Source: EIA Short Term Energy Outlook, November 2017

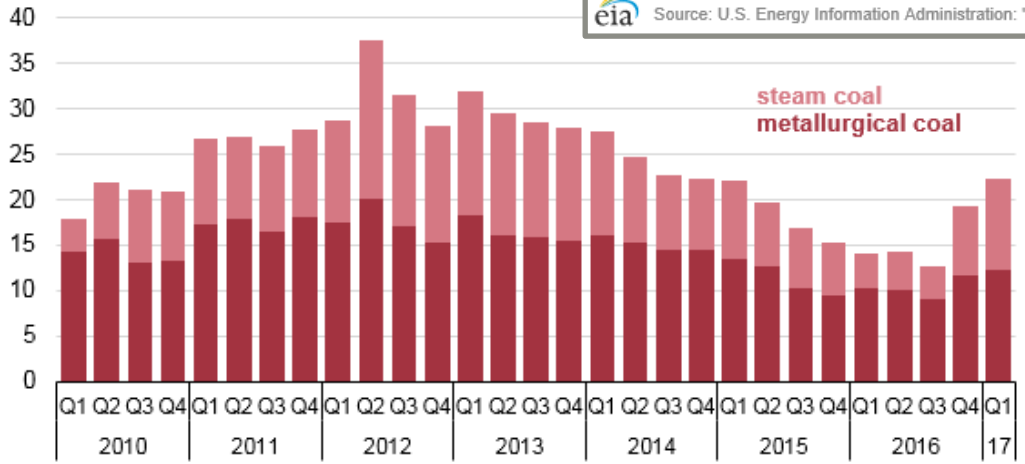


Source: EIA Electric Power Monthly June 2017

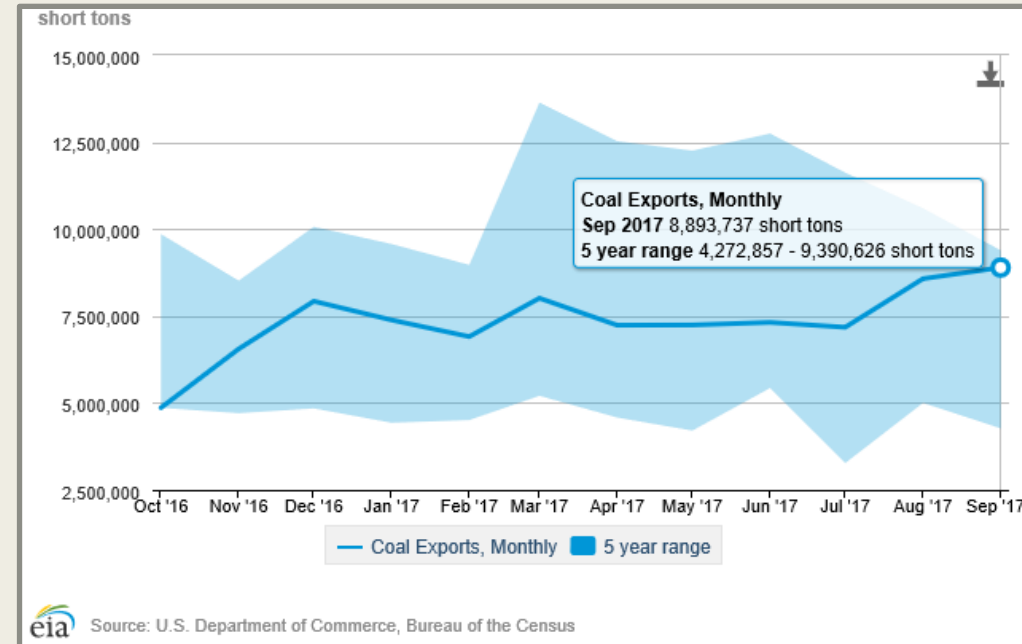
U.S. Coal Status - Exports



U.S. quarterly coal exports (Jan 2001 - Mar 2017)
million short tons

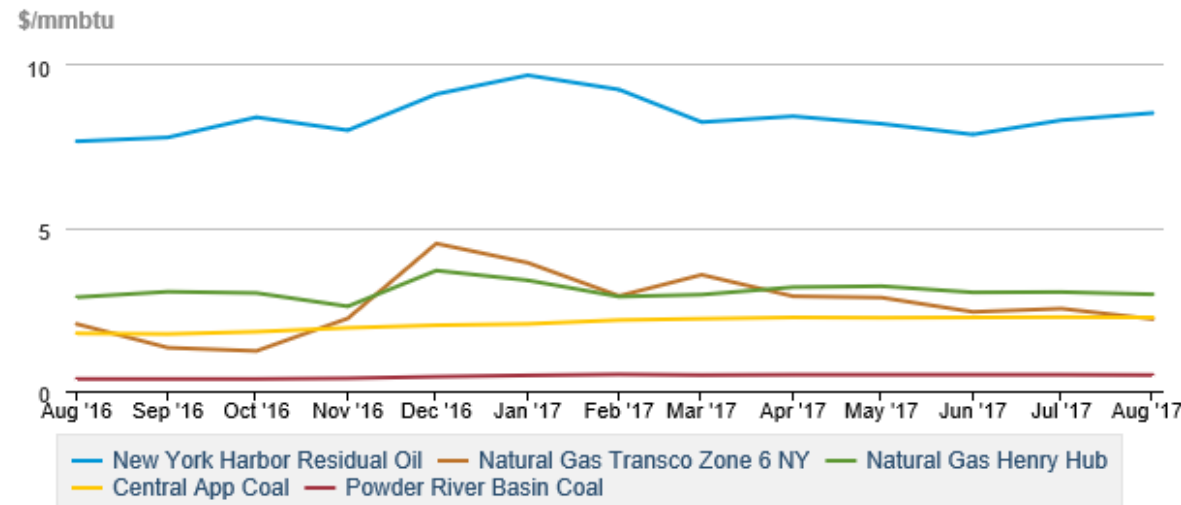


Source: EIA Quarterly Coal Report July 2017



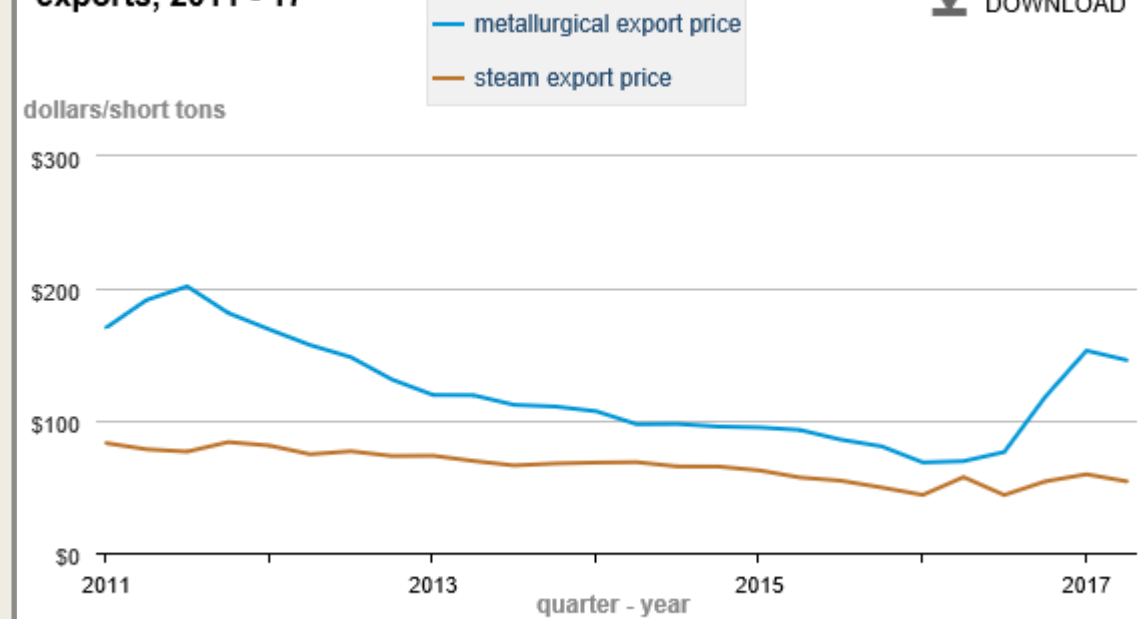
U.S. Coal Status - Pricing

Average fossil fuel spot prices (\$/mmBtu), August 2016 - August 2017 [DOWNLOAD](#)



eia Source: U.S. Energy Information Administration derived from Bloomberg Energy

Average price of U.S. steam and metallurgical coal exports, 2011 - 17 [DOWNLOAD](#)



eia Source: U.S. Energy Information Administration: "Quarterly Coal Report."

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Administration Priorities

- Pro Development
 - *Economic/Job Growth*
 - *Infrastructure Development*
- Pro Market
 - *More Markets, Less Mandates*
 - *Regulatory Reform*
- Pro America
 - *Balance of Trade*
 - *Exports*



Administration Energy Priorities

- American Energy Dominance
 - *Energy Resource Development*
 - *Regulatory Reform*
 - *Exports*

“... we’re going to be an exporter
... We will be dominant.

We will export American energy all over the world.”

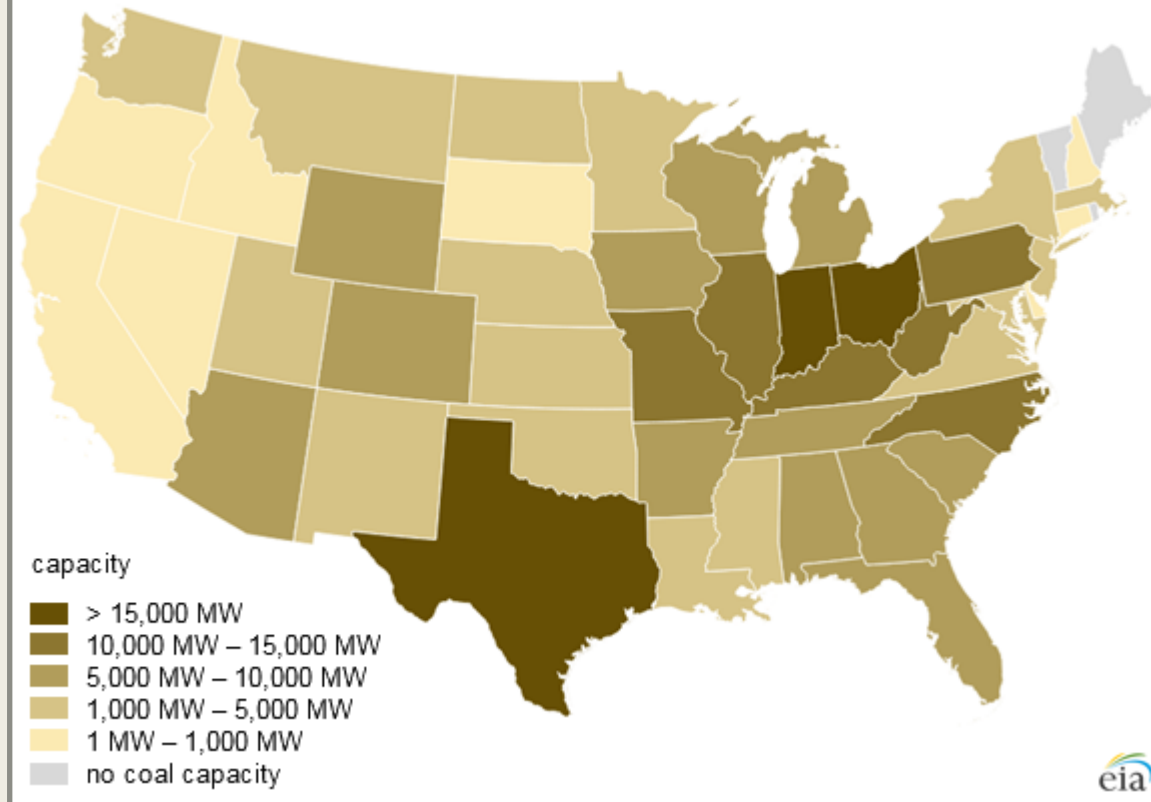
President Trump – June 29th, 2017



Presentation Overview

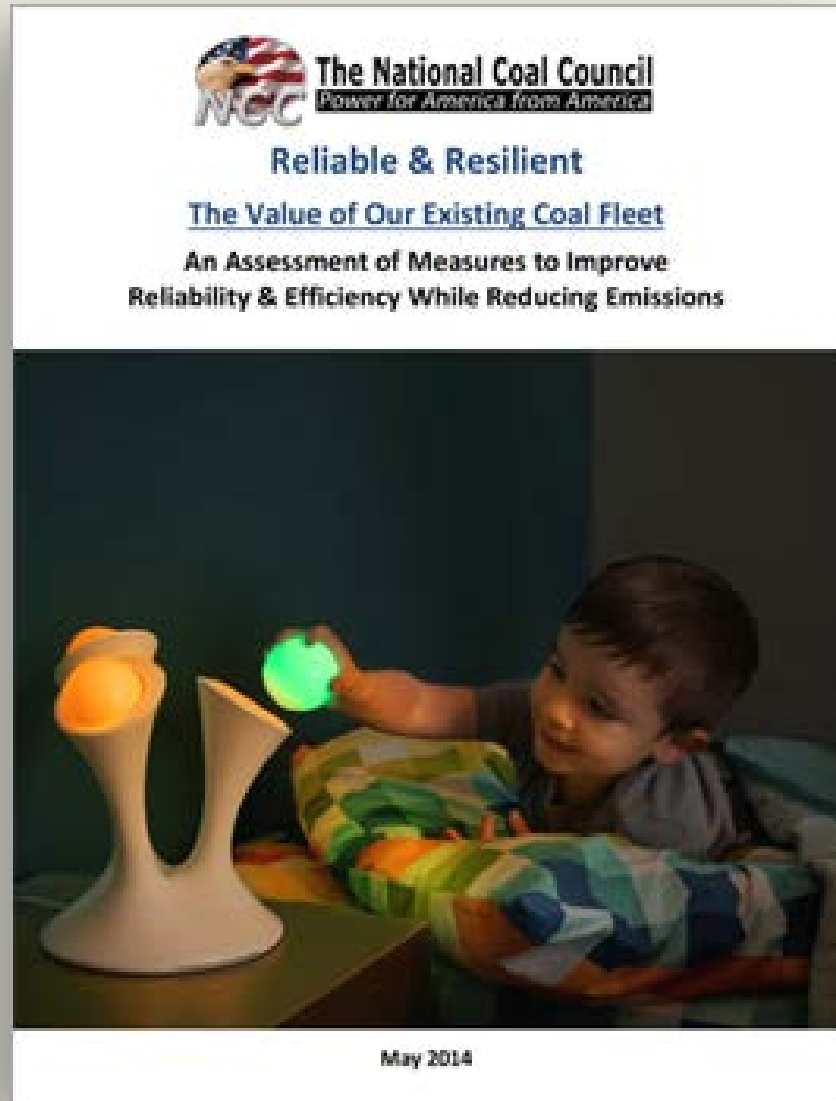
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Coal generating capacity in the Lower 48 states (as of December 2016)



Optimize Existing Coal Fleet





Optimize Existing Coal Fleet

- Benefits of Coal Power Generation
 - ❖ Macroeconomics, Supply & Price Stability
- Changes Impacting Future Benefits
 - ❖ New Source Review
 - ❖ Natural Gas Prices
 - ❖ Reduced Demand for Electricity
 - ❖ Age of Fleet
- Technology to Enhance Flexibility
- Technology to Improve Efficiency
- Technology to Reduce Emissions

THE COAL TREE

COAL IS ENERGY



Advance New Markets for Coal

Benzene – nylon, dyes

Xylene – inks, perfume, paints

Light Oils – pharmaceuticals, photo chemicals

Creosote Oil – aviation fuels, timber preserve

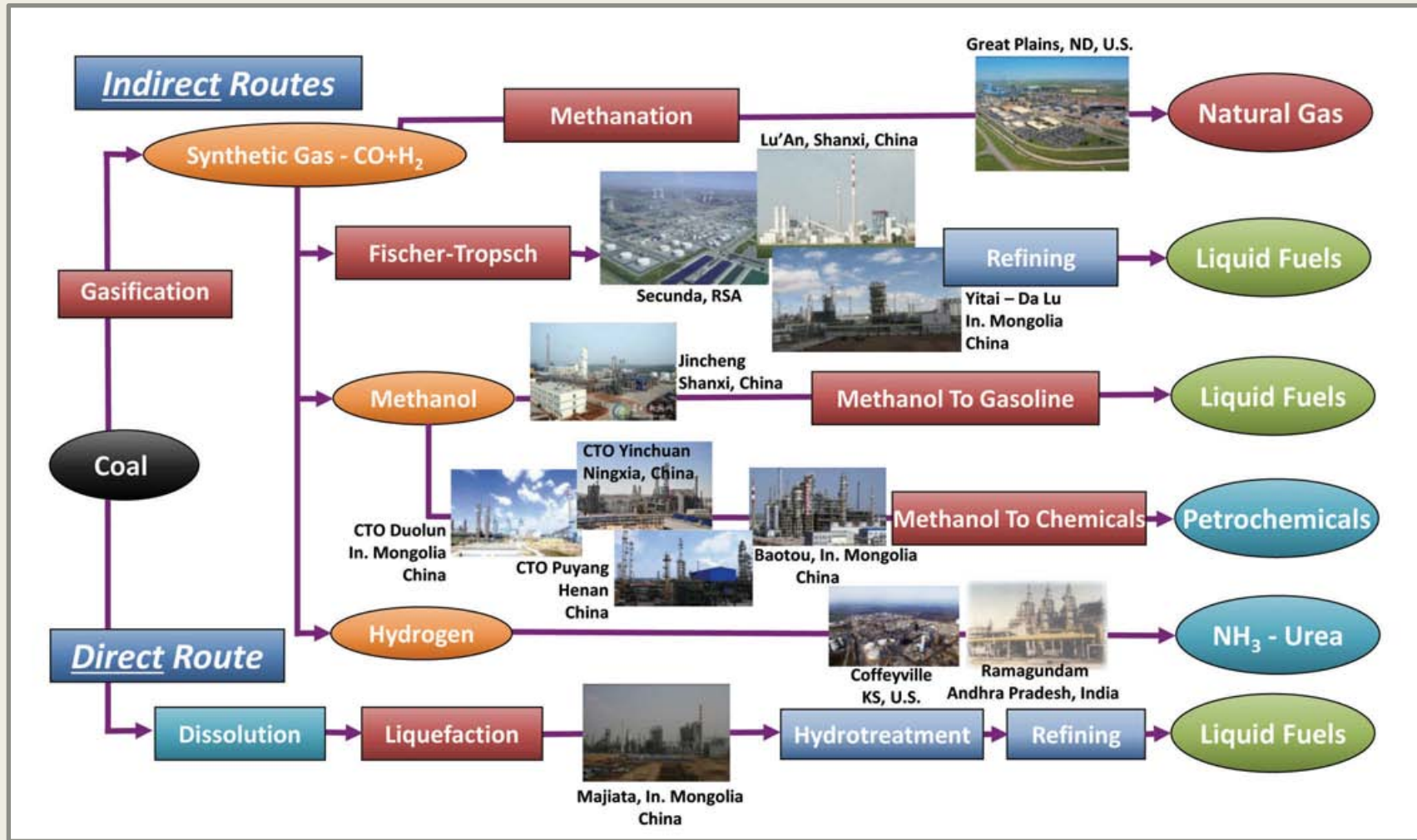
Naphthalene Oil – plastics, moth balls

Naphtha – linoleum, brake lining rubber

Ammonia – soap, explosives

Creosols – sheep dips

Advance New Markets for Coal



Source: Cornerstone Magazine

RDD&D - Advanced Coal Technologies



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RDD&D - Advanced Coal Technologies

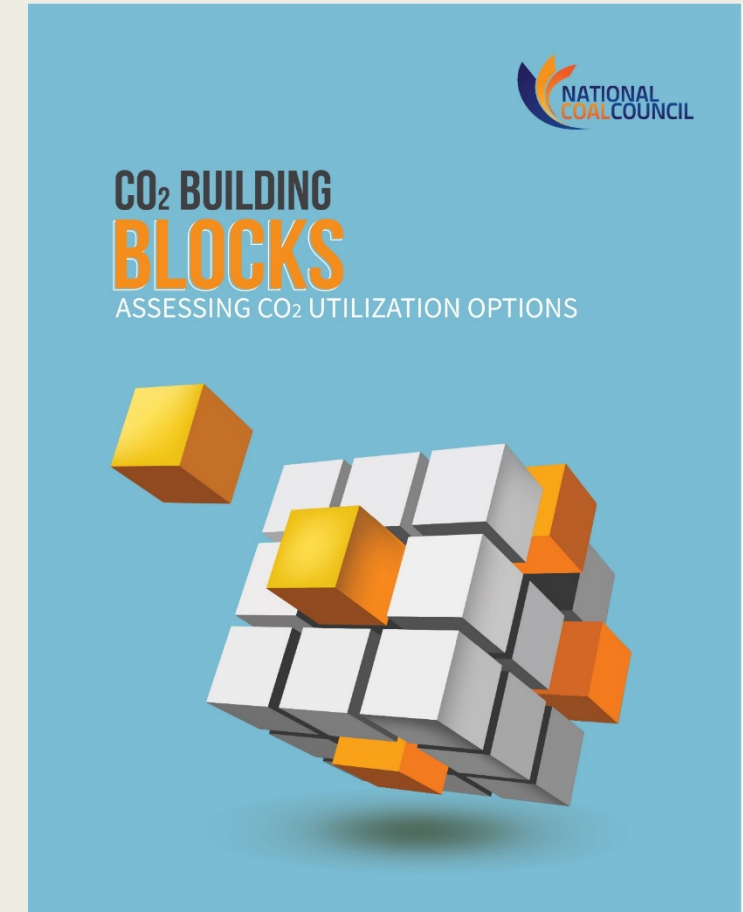
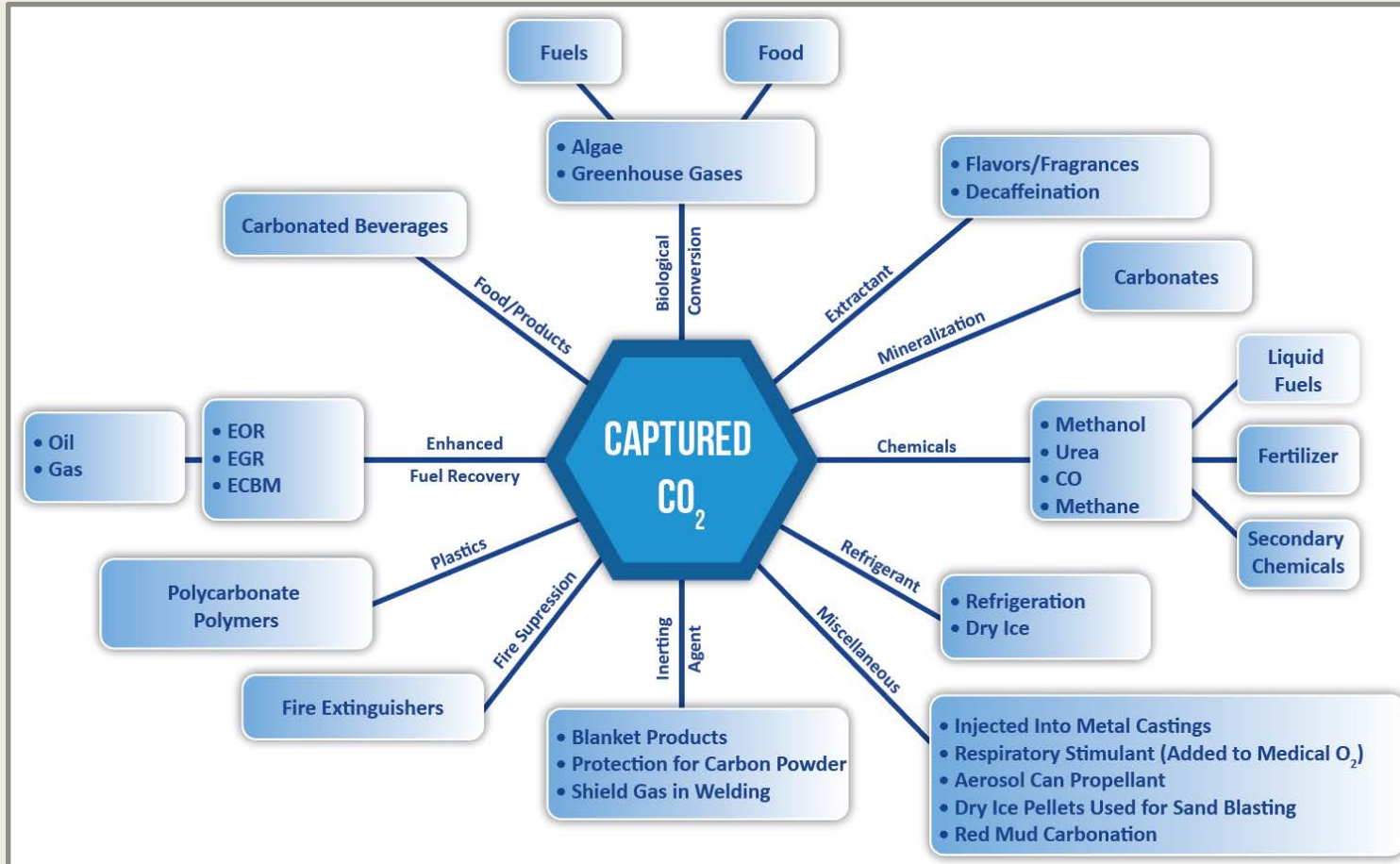


LEVELING THE PLAYING FIELD

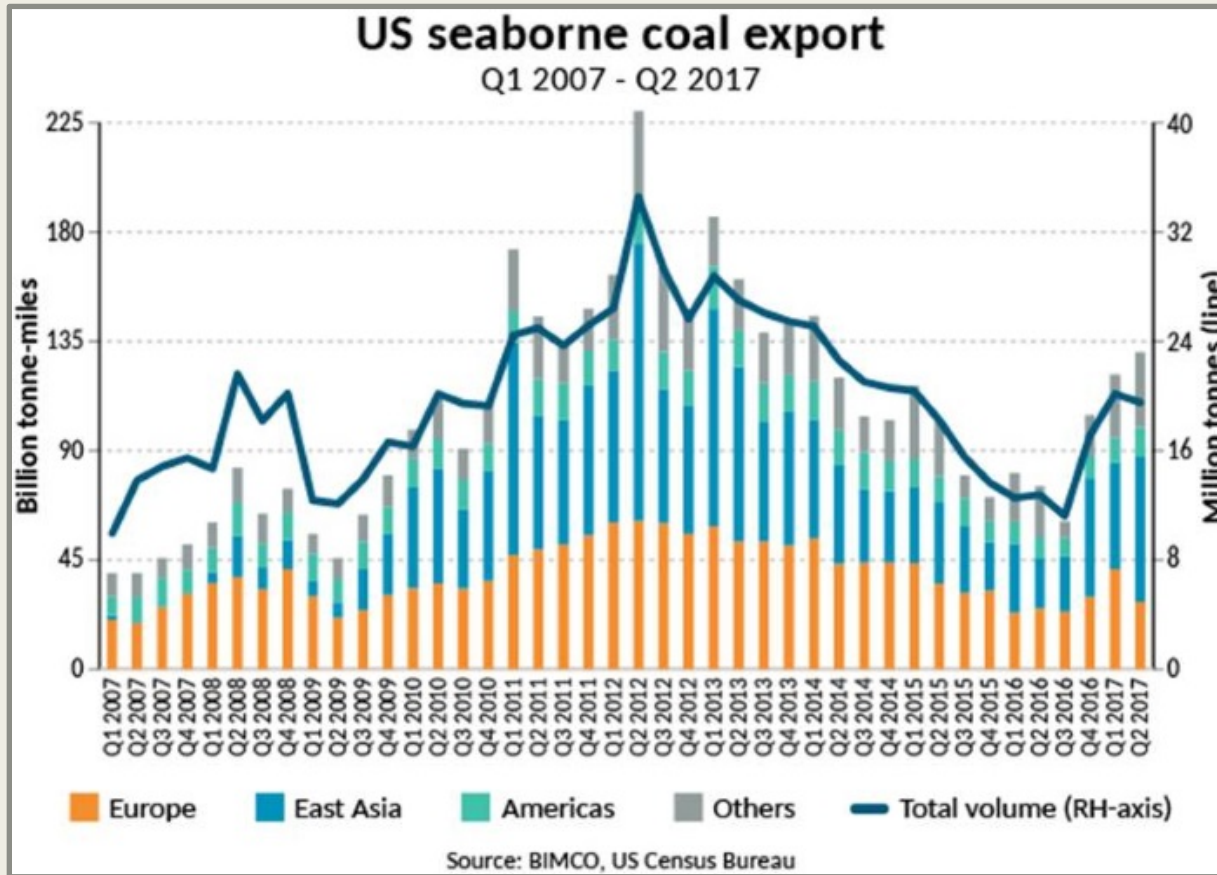
Policy Parity
for Carbon Capture
and Storage
Technologies

NCC White Paper – November 2015

RDD&D - Advanced Coal Technologies



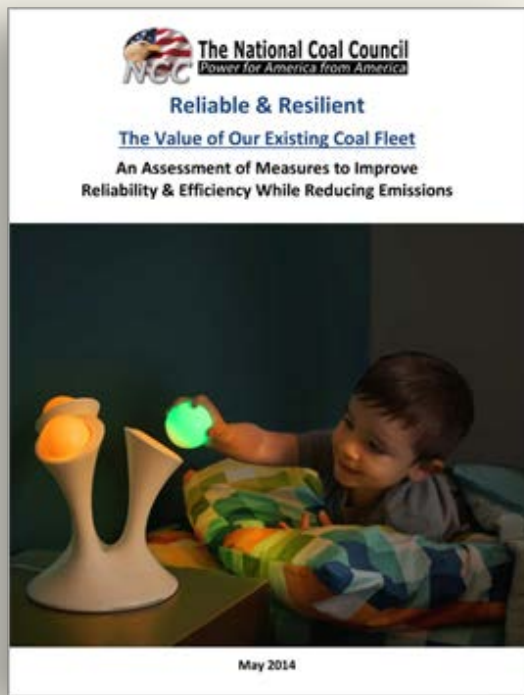
Advance Export Markets for Coal



Advance Industrial Markets for Coal

- Infrastructure Development
- Economic Growth/Job Creation
- National Security





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