

Research Report on Coal Import in China, 2019-2023

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Abstracts

DESCRIPTION

China is the largest coal producer and consumer. The huge coal consumption in China encourages foreign coal producers to expand their production capacity. In addition, overseas coal mines are mostly opencast ones, which makes it easy to increase production. However, coal production in China is restricted by environmental protection policies and other factors. In recent years, some small and medium-sized coal mines had to cut or even stop production because their environmental protection facilities failed to meet standards. Meanwhile, the rising mining costs have made the coal prices in China higher than the international coal prices. For example, in 2017, the average price of imported steam coal was only 429 CNY/ton, about 12% lower than that of domestic steam coal.

According to CRI's analysis, the logistics costs for imported coal are very low because imported coal mostly enters China by sea. While the logistics costs for domestic coal are far higher because the prices of refined oil are more expensive in China than in other parts of the world, and the expressway tolls are excessively high. Therefore, China imports a large quantity of coal every year. In 2017, the import volume of coal in China was about 270.9 million tons, up by 6% from 2016.

Coal imports are classified into anthracite, coking coal, other coal, other bituminous coal and lignite. The first three types of coal are used for thermal power generation and collectively called as steam coal in China. China's coal imports are dominated by steam coal that has a low average price. For example, in 2017, steam coal imports reached about 188.14 million tons, accounting for about 69.4% of China's coal imports. As the major sources of China's coal imports, in 2017, Indonesia, Australia, Mongolia and Russia exported 251 million tons of coal in total to China, contributing about 93% to the import volume of coal in China. Indonesia, the largest source of China's coal imports,

exported about 109 million tons of coal to China in 2017, accounting for 40.2% of the import volume of coal in China.

According to CRI, coal import can bring the following benefits to China: (1) Appropriate amount of coal imports can suppress the price fluctuations and speculation on China's coal market so that the downstream industries can maintain stable production and operation; and (2) the import of high-quality coking coal that China lacks can promote the development of China's coke and metal smelting industries.

However, the Chinese government issues policies to restrict coal import from time to time, worrying that a large quantity of coal imports will harm the interests of domestic coal mining industry. For example, from Jul. 1, 2017, according to the Interim Measures for Administration of Quality of Commercial Coal, the ports administered by province-level governments stopped approving coal import. On Jan. 9, 2018, the National Energy Administration held talks with major power enterprises on assessing power plants' use of imported coal and the supply of coal for power generation. At the beginning of Apr. 2018, the Customs of China's major coal importing provinces such as Fujian, Guangdong and Zhejiang began to restrict coal import.

It is expected by CRI that the import volume of coal in China will continue to grow from 2019 to 2023 but the growth rate may be limited. On one hand, imported coal can stabilize the coal prices in China and improve the operation of the major downstream industries of coal. On the other hand, a large quantity of coal imports will certainly impact China's coal mining industry. Therefore, the Chinese government will issue policies to regulate and rationalize coal imports.

TOPICS COVERED:

China's major policies on coal import

Coal import in China

Comparison of prices of domestic and imported coal in China

Major sources of China's coal imports

Major factors influencing coal import in China

Forecast on coal import in China from 2019 to 2023

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