

# **Steam Coal Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Bituminous Coal, Sub-Bituminous Coal, Lignite), By Application (Power Generation, Cement Manufacturing, Industrial Boilers, Others), By End User (Utilities, Industrial, Commercial, Residential), By Region & Competition, 2020-2030F**

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## **Abstracts**

### Market Overview

Global Steam Coal Market was valued at USD 142.82 billion in 2024 and is expected to reach USD 170.67 billion by 2030 with a CAGR of 2.86% during the forecast period.

The Steam Coal Market refers to the global trade and consumption of coal that is primarily used for heat generation in thermal power plants and industrial boilers. Also known as thermal coal, steam coal is a combustible sedimentary rock primarily composed of carbon, hydrogen, and oxygen, and is widely utilized for producing steam that drives turbines for electricity generation. Unlike metallurgical coal, which is used in steelmaking, steam coal is mostly used in the energy sector due to its efficiency in heat generation and relative affordability compared to alternative fuels. The steam coal market is segmented by coal type—such as bituminous, sub-bituminous, and lignite—each differing in calorific value and ash content, influencing their suitability across different industrial applications.

The market is expected to grow steadily, especially in developing regions such as Asia Pacific and parts of Africa, where rapid industrialization, urbanization, and rising electricity demand continue to drive reliance on coal-fired power generation. Countries

such as India, China, Indonesia, and Vietnam are heavily investing in coal-based energy infrastructure to meet growing population needs and industrial output, positioning steam coal as a key energy source in the short to medium term. Furthermore, many emerging economies face logistical and financial challenges in shifting rapidly to renewable energy sources, making steam coal a critical transitional fuel due to its availability, energy density, and established supply chains.

Despite global efforts toward decarbonization and the rise of cleaner energy alternatives, the steam coal market will experience continued demand in the near future, supported by long-term power purchase agreements, existing coal-fired assets, and energy security concerns. Innovations in cleaner coal technologies, including carbon capture and storage (CCS), may also enhance the sustainability of steam coal usage, especially in regions aiming to balance energy access with environmental commitments. Overall, the steam coal market will rise moderately, driven by economic expansion in developing nations, the need for reliable baseload power, and the slow pace of energy transition in coal-dependent regions.

#### Key Market Drivers.

#### Sustained Global Energy Demand and Coal's Role in Power Generation

The Steam Coal Market is driven by the persistent global demand for affordable and reliable energy, particularly in coal-dependent regions where steam coal remains a cornerstone for electricity generation. Despite the global push for renewable energy, steam coal continues to play a critical role in meeting baseload power requirements, especially in emerging economies like India, China, and parts of Southeast Asia. These regions rely on coal-fired power plants to support rapid industrialization, urbanization, and growing electricity consumption.

Steam coal's high energy content and cost-effectiveness make it a preferred fuel for thermal power plants, which account for a significant portion of global electricity production. Its accessibility and established infrastructure, including extensive mining operations and transportation networks, ensure its continued use in countries with limited access to alternative energy sources. Additionally, steam coal's ability to provide consistent power output complements intermittent renewable sources like wind and solar, making it a critical component in hybrid energy systems.

The ongoing development of coal-based power projects, particularly in Asia, coupled with the slow transition to cleaner energy in some regions, sustains demand for steam

coal. Furthermore, advancements in cleaner coal technologies, such as high-efficiency, low-emission (HELE) plants, are extending the viability of steam coal by reducing environmental impacts while maintaining its economic advantages. As global energy needs continue to rise, driven by population growth and industrial expansion, the Steam Coal Market remains robust, supported by its critical role in ensuring energy security and affordability for power generation.

In 2024, coal-fired power plants accounted for approximately 37% of global electricity generation, with steam coal comprising 80% of coal used in thermal power plants. Asia-Pacific consumed 1.8 billion metric tons of steam coal in 2024, representing a 5% increase from 2023, driven by new coal plant capacities in India and China adding 25 gigawatts to the grid.

## Key Market Challenges

### Stringent Environmental Regulations and Decarbonization Policies

One of the most pressing challenges faced by the steam coal market is the intensifying global push towards environmental sustainability and the enforcement of strict decarbonization policies by both developed and emerging economies. In response to the escalating threats of climate change, governments, international institutions, and environmental agencies have introduced comprehensive climate agreements and national mandates to reduce greenhouse gas emissions, with a particular focus on the energy and industrial sectors. As steam coal combustion is one of the highest sources of carbon dioxide emissions, its use has increasingly come under scrutiny. Countries across the European Union, North America, and parts of Asia are phasing out coal-fired power plants, introducing carbon pricing mechanisms, and imposing taxes or penalties on high-emission industries.

These regulatory shifts not only impact domestic coal consumption but also affect international trade patterns, limiting export opportunities for major coal-producing nations such as Australia, Indonesia, South Africa, and Colombia. Additionally, financial institutions and investors are becoming increasingly reluctant to finance new coal-based projects, given the reputational and regulatory risks associated with carbon-intensive portfolios. The rise of Environmental, Social, and Governance (ESG) investing further compounds this challenge, as institutional investors reallocate funds towards cleaner and more sustainable energy sources.

## Key Market Trends

## Surging Demand from Emerging Economies to Sustain Coal Consumption

Despite the global shift toward clean energy, a notable trend shaping the steam coal market is the consistent and rising demand from emerging economies. Countries such as India, Indonesia, Vietnam, Bangladesh, and the Philippines continue to rely heavily on coal-fired power generation to support their rapid industrialization and expanding urban infrastructure. In these economies, coal remains one of the most accessible and cost-effective sources of baseload electricity, particularly in regions where renewable energy infrastructure is still in the early stages of development.

The government-led push for rural electrification, expansion of manufacturing industries, and enhancement of transport and urban development projects is directly linked to increased electricity consumption. Steam coal, due to its high calorific value and reliability, plays a vital role in ensuring uninterrupted power supply, especially in countries where energy security is a critical concern. Additionally, abundant domestic coal reserves in countries like India and Indonesia reduce import dependence, making coal a strategically favorable option in national energy policies.

Many of these economies have also committed to gradual, rather than abrupt, energy transitions, giving steam coal a prolonged role in their energy mix. For example, while India is aggressively investing in solar and wind energy, it continues to approve new coal-fired projects to meet growing demand and maintain grid stability. Similarly, Indonesia's long-term energy roadmap projects a significant share for coal through 2030 and beyond.

### Key Market Players

China Shenhua Energy Company Limited

Coal India Limited

Glencore plc

BHP Group Limited

Peabody Energy Corporation

Anglo American plc

Yanzhou Coal Mining Company Limited

Adaro Energy Indonesia Tbk

Whitehaven Coal Limited

Banpu Public Company Limited

### Report Scope:

In this report, the Global Steam Coal Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Steam Coal Market, By Type:

Bituminous Coal

Sub-Bituminous Coal

Lignite

#### Steam Coal Market, By Application:

Power Generation

Cement Manufacturing

Industrial Boilers

Others

#### Steam Coal Market, By End User:

Utilities

Industrial

Commercial

Residential

### Steam Coal Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

France

United Kingdom

Italy

Spain

South America

Brazil

Argentina

Colombia

Asia-Pacific

China

India

Japan

South Korea

Australia

Middle East & Africa

Saudi Arabia

UAE

South Africa

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Steam Coal Market.

## Available Customizations:

Global Steam Coal Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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