

China Coal Market Report and Forecast 2024-2032

Market Report | 2024-03-28 | 140 pages | EMR Inc.

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Report description:

China Coal Market Report and Forecast 2024-2032

Market Outlook

According to the report by Expert Market Research (EMR), the China coal market size reached 4619 MMT in 2023. Aided by the rising usage of coal in China's energy sector, the market is projected to further grow at a CAGR of 3.3% between 2024 and 2032 to reach a value of around 6133 MMT by 2032.

Coal remains the backbone of China's energy supply, accounting for a significant portion of the country's electricity generation and industrial fuel needs. Despite global shifts towards renewable energy sources, coal's predominance in China is underpinned by its abundant reserves, established infrastructure, and the strategic importance of energy security for the nation.

The primary driver for the China coal market growth is the enduring demand from the electric power sector and heavy industrial sectors, including steel and cement manufacturing. As China continues to urbanise and industrialise, the demand for electricity and industrial products sustains the need for coal as a key energy source. China's approach to energy security, emphasizing self-sufficiency and economic stability, significantly influences its coal market. Given the volatility of global energy prices and geopolitical tensions, coal offers a relatively stable and controllable resource for the nation.

As per the China coal market analysis, as environmental pressures mount, there is a growing emphasis on enhancing the efficiency of coal-fired power plants and deploying clean coal technologies. This includes the adoption of supercritical and ultra-supercritical steam cycles that significantly reduce CO₂ emissions per unit of electricity generated. Moreover, China is investing in Integrated Gasification Combined Cycle (IGCC) plants and exploring carbon capture, utilisation, and storage (CCUS) technologies to mitigate the environmental impact of coal usage.

As per the China coal market outlook, coal in China is not just a source of electricity; it is also a crucial raw material for the production of synthetic chemicals, liquid fuels, and building materials. The coal chemical sector, which includes the production of coal-to-liquids (CTL) and coal-to-chemicals (CTC) processes, represents a significant area of innovation and investment, aiming to add value to coal resources while addressing environmental concerns.

China is a global leader in the development of coal-to-chemicals (CTC) and coal-to-liquid (CTL) fuels technology. This trend reflects an effort to maximise the value chain of coal by producing synthetic natural gas, fertilisers, methanol, and other chemicals, which further contributes to the China coal market share. While offering economic benefits and reducing reliance on imported oil and

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gas, these processes are energy-intensive and face environmental scrutiny.

Increasingly, investors and stakeholders are focusing on Environmental and Social Governance (ESG) criteria, impacting the financing and expansion of coal projects. Companies in the coal sector are under pressure to demonstrate their commitment to sustainability, environmental protection, and social responsibility, influencing operational practices and investment decisions. The Chinese government's environmental policies and commitments to reducing carbon emissions are shaping the China coal market. Investments in clean coal technologies, including carbon capture and storage (CCS) and high-efficiency, low-emission (HELE) coal-fired power plants, are part of China's strategy to balance economic growth with environmental sustainability. China's role as the world's largest producer and consumer of coal also impacts global coal markets, influencing prices and trade flows. The country's import and export policies can have significant ramifications for global coal demand and supply dynamics.

The China coal market expansion is subject to domestic price fluctuations influenced by government policies, production quotas, and demand dynamics. To stabilise domestic coal prices and ensure supply security, China adjusts its import policies based on domestic needs and international market conditions, impacting global coal trade patterns.

Market Segmentation □

The market can be divided based on type, mining technology, and end use.

Market Breakup by Type

- Bituminous Coal
- Sub-Bituminous Coal
- Anthracite Coal
- Lignite Coal

Market Breakup by Mining Technology

- Surface Mining
- Underground Mining

Market Breakup by End Use

- Power Generation
- Steel and Iron Industry
- Others

Competitive Landscape

The EMR report looks into the market shares, plant turnarounds, capacities, investments, and mergers and acquisitions, among other major developments, of the leading companies operating in the China coal market. Some of the major players explored in the report by Expert Market Research are as follows:

- Huadian Power International Corporation Limited
- China Coal Energy Group Co., Ltd.
- CHN Energy Investment Group Co., Ltd.
- Shanxi Coking Coal Group Co., Ltd.
- State Power Investment Corporation Limited
- Yankuang Energy Group Company Limited
- Huaibei Mining Holdings Co., Ltd.
- Shaanxi Coal and Chemical Industry Group Co., Ltd.
- Huaneng Power International Ltd.
- China Resources Power Holdings Co. Ltd.
- Others

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Table of Contents:

- 1 Preface
- 2 Report Coverage - Key Segmentation and Scope
- 3 Report Description
 - 3.1 Market Definition and Outlook
 - 3.2 Properties and Applications
 - 3.3 Market Analysis
 - 3.4 Key Players
- 4 Key Assumptions
- 5 Executive Summary
 - 5.1 Overview
 - 5.2 Key Drivers
 - 5.3 Key Developments
 - 5.4 Competitive Structure
 - 5.5 Key Industrial Trends
- 6 Market Snapshot
- 7 Opportunities and Challenges in the Market
- 8 Asia Pacific Coal Market Overview
 - 8.1 Key Industry Highlights
 - 8.2 Asia Pacific Coal Historical Market (2018-2023)
 - 8.3 Asia Pacific Coal Market Forecast (2024-2032)
 - 8.4 Asia Pacific Coal Market breakup by Country
 - 8.4.1 China
 - 8.4.2 Japan
 - 8.4.3 India
 - 8.4.4 ASEAN
 - 8.4.5 Australia
 - 8.4.6 Others
- 9 China Coal Market Overview
 - 9.1 Key Industry Highlights
 - 9.2 China Coal Historical Market (2018-2023)
 - 9.3 China Coal Market Forecast (2024-2032)
- 10 China Coal Market by Type
 - 10.1 Bituminous Coal
 - 10.1.1 Historical Trend (2018-2023)
 - 10.1.2 Forecast Trend (2024-2032)
 - 10.2 Sub-Bituminous Coal
 - 10.2.1 Historical Trend (2018-2023)
 - 10.2.2 Forecast Trend (2024-2032)
 - 10.3 Anthracite Coal
 - 10.3.1 Historical Trend (2018-2023)

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- 10.3.2 Forecast Trend (2024-2032)
- 10.4 Lignite Coal
 - 10.4.1 Historical Trend (2018-2023)
 - 10.4.2 Forecast Trend (2024-2032)
- 11 China Coal Market by Mining Technology
 - 11.1 Surface Mining
 - 11.1.1 Historical Trend (2018-2023)
 - 11.1.2 Forecast Trend (2024-2032)
 - 11.2 Underground Mining
 - 11.2.1 Historical Trend (2018-2023)
 - 11.2.2 Forecast Trend (2024-2032)
- 12 China Coal Market by End Use
 - 12.1 Power Generation
 - 12.1.1 Historical Trend (2018-2023)
 - 12.1.2 Forecast Trend (2024-2032)
 - 12.2 Steel and Iron Industry
 - 12.2.1 Historical Trend (2018-2023)
 - 12.2.2 Forecast Trend (2024-2032)
 - 12.3 Others
- 13 Market Dynamics
 - 13.1 SWOT Analysis
 - 13.1.1 Strengths
 - 13.1.2 Weaknesses
 - 13.1.3 Opportunities
 - 13.1.4 Threats
 - 13.2 Porter's Five Forces Analysis
 - 13.2.1 Supplier's Power
 - 13.2.2 Buyer's Power
 - 13.2.3 Threat of New Entrants
 - 13.2.4 Degree of Rivalry
 - 13.2.5 Threat of Substitutes
 - 13.3 Key Indicators for Demand
 - 13.4 Key Indicators for Price
- 14 Trade Data Analysis (HS Code - 2701)
 - 14.1 Major Importing Countries
 - 14.1.1 By Volume
 - 14.1.2 By Value
 - 14.2 Major Exporting Countries
 - 14.2.1 By Volume
 - 14.2.2 By Value
- 15 Price Analysis
- 16 Competitive Landscape
 - 16.1 Market Structure
 - 16.2 Company Profiles
 - 16.2.1 Huadian Power International Corporation Limited
 - 16.2.1.1 Company Overview
 - 16.2.1.2 Product Portfolio

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- 16.2.1.3 Demographic Reach and Achievements
- 16.2.1.4 Certifications
- 16.2.2 China Coal Energy Group Co., Ltd.
 - 16.2.2.1 Company Overview
 - 16.2.2.2 Product Portfolio
 - 16.2.2.3 Demographic Reach and Achievements
 - 16.2.2.4 Certifications
- 16.2.3 CHN Energy Investment Group Co., Ltd.
 - 16.2.3.1 Company Overview
 - 16.2.3.2 Product Portfolio
 - 16.2.3.3 Demographic Reach and Achievements
 - 16.2.3.4 Certifications
- 16.2.4 Shanxi Coking Coal Group Co., Ltd.
 - 16.2.4.1 Company Overview
 - 16.2.4.2 Product Portfolio
 - 16.2.4.3 Demographic Reach and Achievements
 - 16.2.4.4 Certifications
- 16.2.5 State Power Investment Corporation Limited
 - 16.2.5.1 Company Overview
 - 16.2.5.2 Product Portfolio
 - 16.2.5.3 Demographic Reach and Achievements
 - 16.2.5.4 Certifications
- 16.2.6 Yankuang Energy Group Company Limited
 - 16.2.6.1 Company Overview
 - 16.2.6.2 Product Portfolio
 - 16.2.6.3 Demographic Reach and Achievements
 - 16.2.6.4 Certifications
- 16.2.7 Huaibei Mining Holdings Co., Ltd.
 - 16.2.7.1 Company Overview
 - 16.2.7.2 Product Portfolio
 - 16.2.7.3 Demographic Reach and Achievements
 - 16.2.7.4 Certifications
- 16.2.8 Shaanxi Coal and Chemical Industry Group Co., Ltd.
 - 16.2.8.1 Company Overview
 - 16.2.8.2 Product Portfolio
 - 16.2.8.3 Demographic Reach and Achievements
 - 16.2.8.4 Certifications
- 16.2.9 Huaneng Power International Ltd.
 - 16.2.9.1 Company Overview
 - 16.2.9.2 Product Portfolio
 - 16.2.9.3 Demographic Reach and Achievements
 - 16.2.9.4 Certifications
- 16.2.10 China Resources Power Holdings Co. Ltd.
 - 16.2.10.1 Company Overview
 - 16.2.10.2 Product Portfolio
 - 16.2.10.3 Demographic Reach and Achievements
 - 16.2.10.4 Certifications

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16.2.11 Others

17 Key Trends and Developments in the Market

List of Key Figures and Tables

1. Asia Pacific Coal Market: Key Industry Highlights, 2018 and 2032
2. China Coal Market: Key Industry Highlights, 2018 and 2032
3. China Coal Historical Market: Breakup by Type (MMT), 2018-2023
4. China Coal Market Forecast: Breakup by Type (MMT), 2024-2032
5. China Coal Historical Market: Breakup by Mining Technology (MMT), 2018-2023
6. China Coal Market Forecast: Breakup by Mining Technology (MMT), 2024-2032
7. China Coal Historical Market: Breakup by End Use (MMT), 2018-2023
8. China Coal Market Forecast: Breakup by End Use (MMT), 2024-2032
9. Major Importing Countries by Volume
10. Major Exporting Countries by Volume
11. Major Importing Countries by Value
12. Major Exporting Countries by Value
13. China Coal Market Structure

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