



NEW SOUTH WALES  
MINERALS COUNCIL LTD  
MININGENUITY™

The NSW Coal Industry:  
A Story of Growth and Innovation  
Opportunities for India  
12 February 2010  
Dr Nikki Williams

# ABOUT NSWMC



NEW SOUTH WALES  
MINERALS COUNCIL LTD  
MININGENUITY™

- Not-for-profit industry association
- Represents NSW's \$23 billion minerals industry
- Members include producers, operators, explorers
- Work with government, industry, community, media and other stakeholders
- Fosters a dynamic, efficient and sustainable mining industry

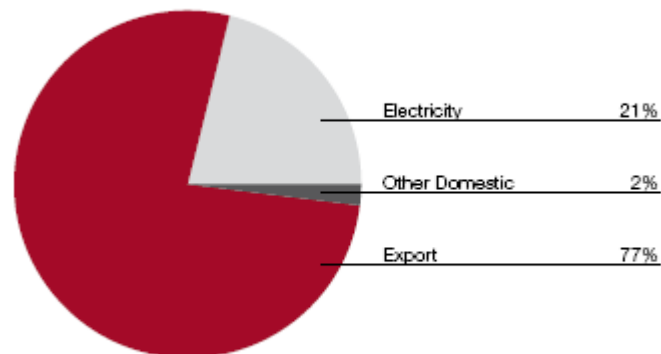
# NSW GROWTH



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- NSW coal exports valued at \$12.5 billion in 2008-09
- 77% of NSW coal is exported
- Coal export growth underpinned by increased demand from China, South Korea and India
- India takes 11% of NSW export coking coal

Chart 1 Market for NSW coal 2008-09 (preliminary)



(\*) other domestic includes iron and steel, cokeworks, cement and other non-specified.

Source: Coal Services Pty Ltd (CSPL)

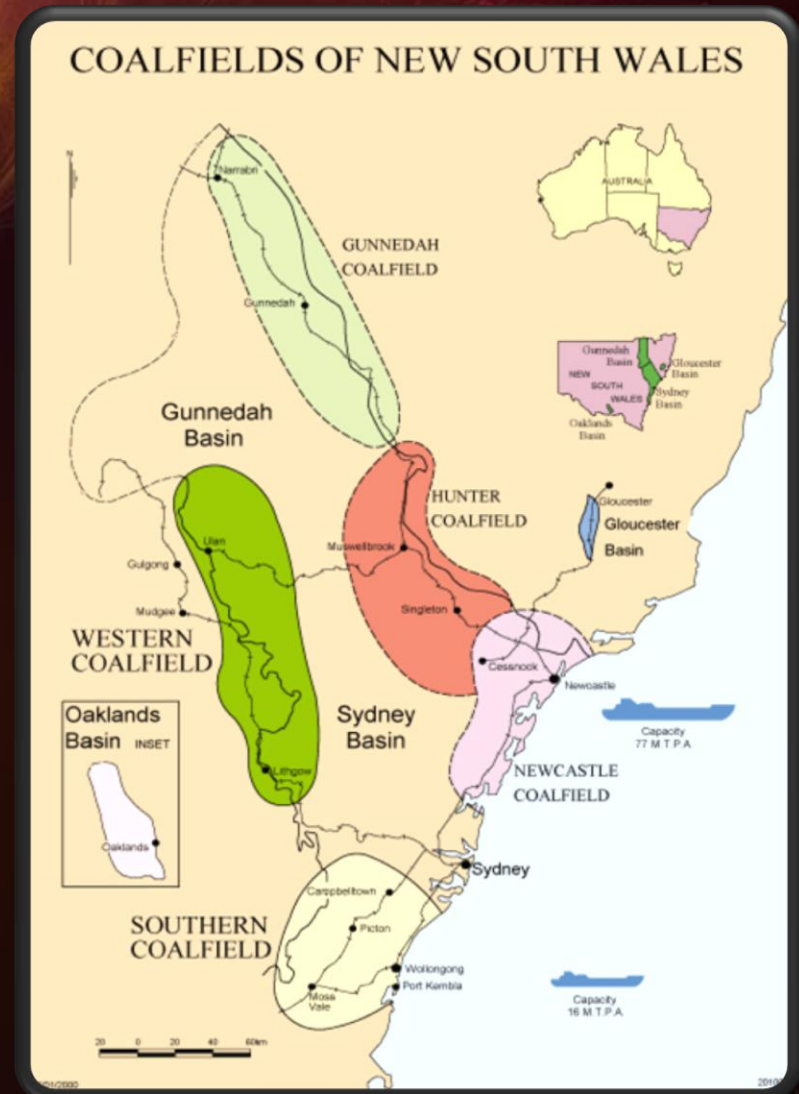
# NSW COALFIELDS



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2008-09:

- NSW saleable coal production = 138Mt
- NSW coal exports = 103Mt
  - Thermal = 82.1 Mt
  - Coking = 21.2 Mt



Source: Industry and Investment NSW

# COAL RESERVES



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## ESTIMATED NSW RECOVERABLE COAL RESERVES

COALFIELD	RESERVES (Mt)
Hunter	4,493
Western	1,796
Newcastle	1,648
Gunnedah	1,488
Southern	786

Source: Coal Services Pty Ltd

# WORLD COMPARISON



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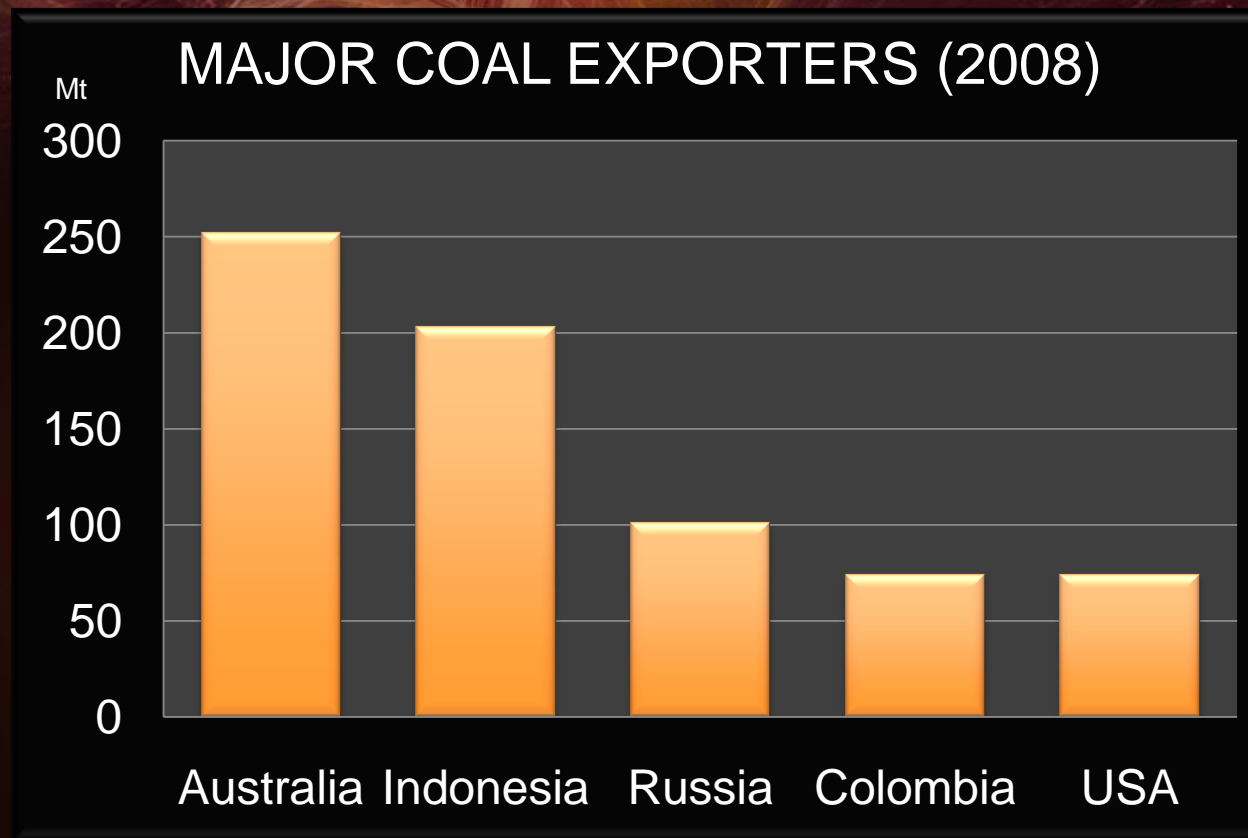
## MAJOR COAL PRODUCERS

1. China = 2,761Mt
2. USA = 1,007Mt
3. India = 490Mt
4. Australia = 325Mt
5. Russia = 247Mt

# WORLD COMPARISON



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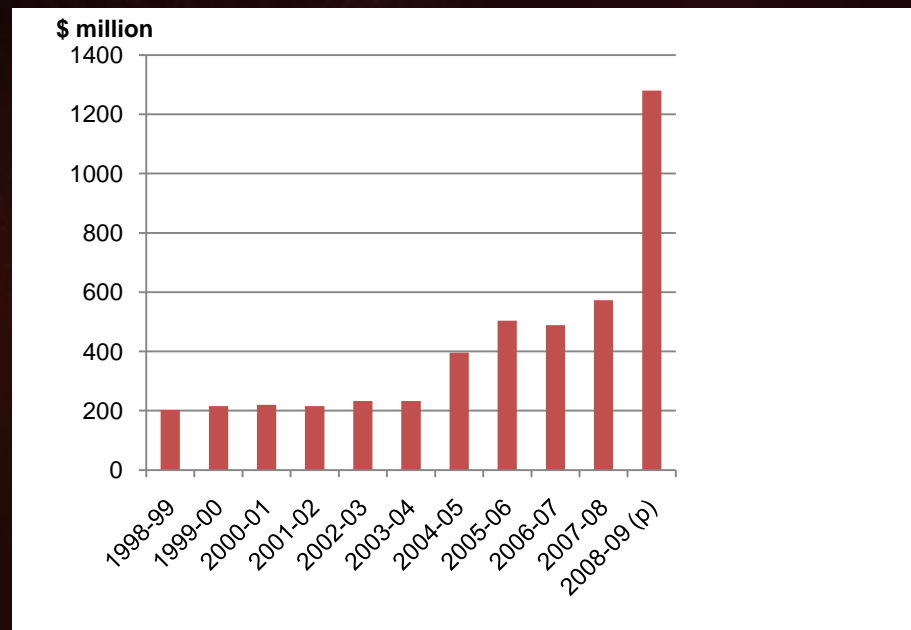
Source: World Coal Institute

# ROYALTIES



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- Royalties provided to the NSW Government exceed \$1.28 billion in 2008-09, up from \$489 million in 2006-07



Sources: NSWMC Key Industry Statistics, Industry and Investment NSW

# JOB CREATOR



NEW SOUTH WALES  
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- 30,000 people employed in the NSW minerals industry
- More than 17,000 in coal mining
- Mining workforce is the best paid in NSW

# GLOBAL DEMAND



NEW SOUTH WALES  
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- Growth in:
  - Thermal coal – 2.6% per annum
  - Coking coal – 1.4% per annum
- 90% of growth to come from non-OECD Asia

# SAFETY



NEW SOUTH WALES  
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- Safety is the industry's number one priority
- Industry wide objective is zero harm
- Wran Review – safety reform
- MSAC – tripartite approach