

Global Coal Risk Assessment

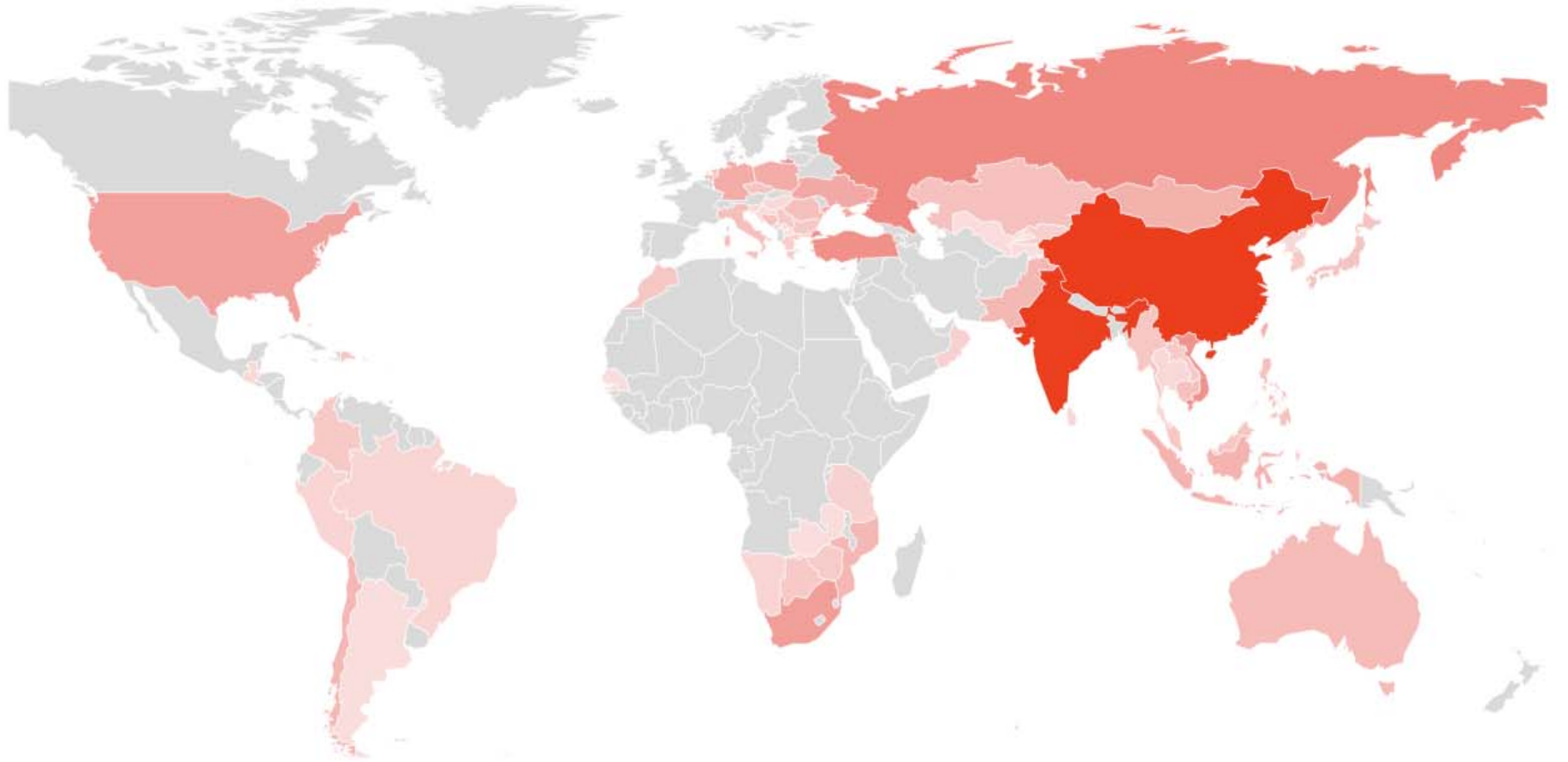
November, 2012

A total of **1,199** new coal-fired plants

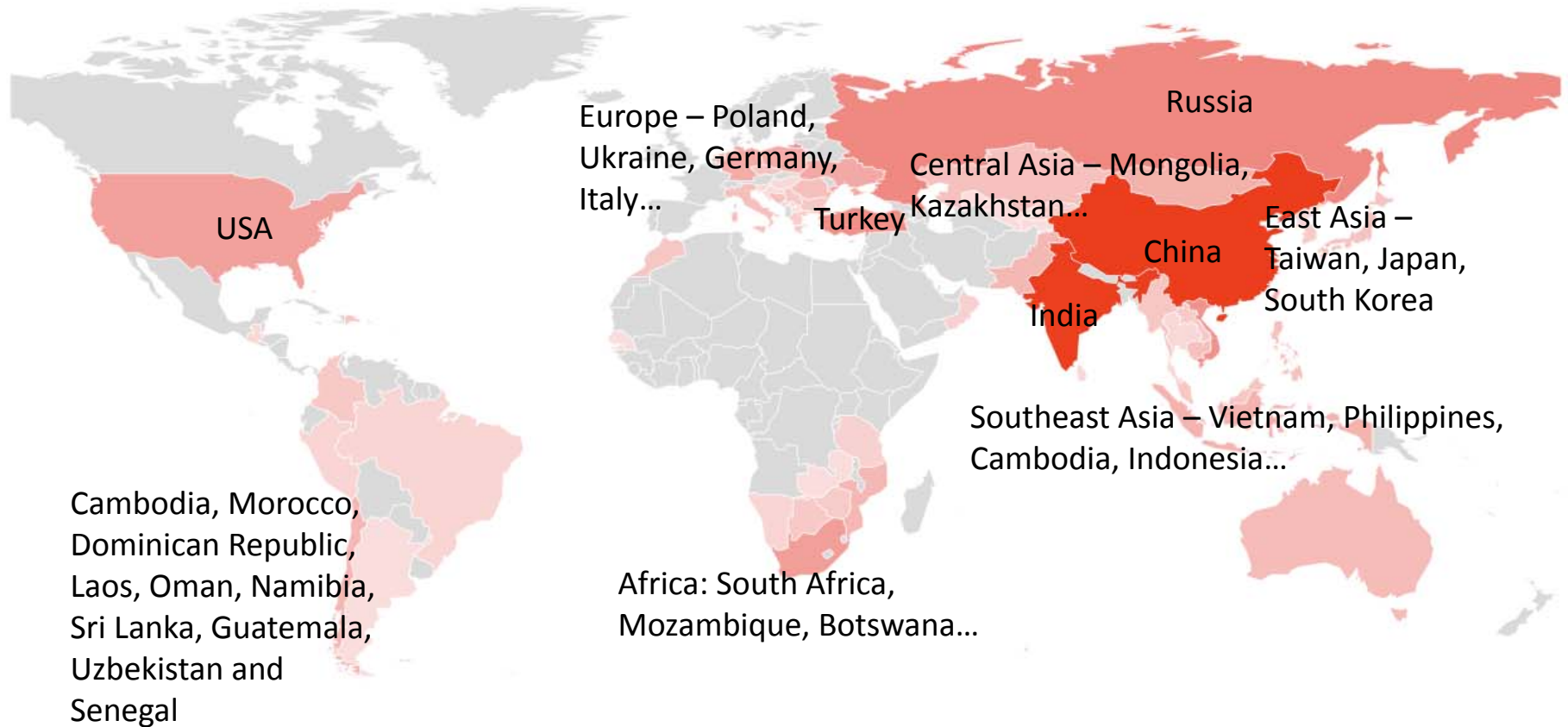
with a total installed capacity of **1,401,278 MW**

are being proposed in **59** countries.

Total Capacity of Proposed Coal-Fired Plants



Total Capacity of Proposed Coal-Fired Plants



Top 10 countries in terms of proposed coal-fired plants by capacity

Ranking	Country	Total Installed Capacity (MW)	No. Projects
1	China	557,938	363
2	India	519,396	455
3	Russia	48,000	*c.48
4	Turkey	36,719	49
5	Vietnam	34,725	30
6	South Africa	22,633	8
7	United States	20,236	36
8	Ukraine	14,000	*c.14
9	Poland	12,086	13
10	Germany	12,060	10

The Companies Behind

483 power companies are involved in proposing new coal-fired power projects.

Slide 5

RC1

change the word "bubble"?

Ryna Cui, 9/26/2012

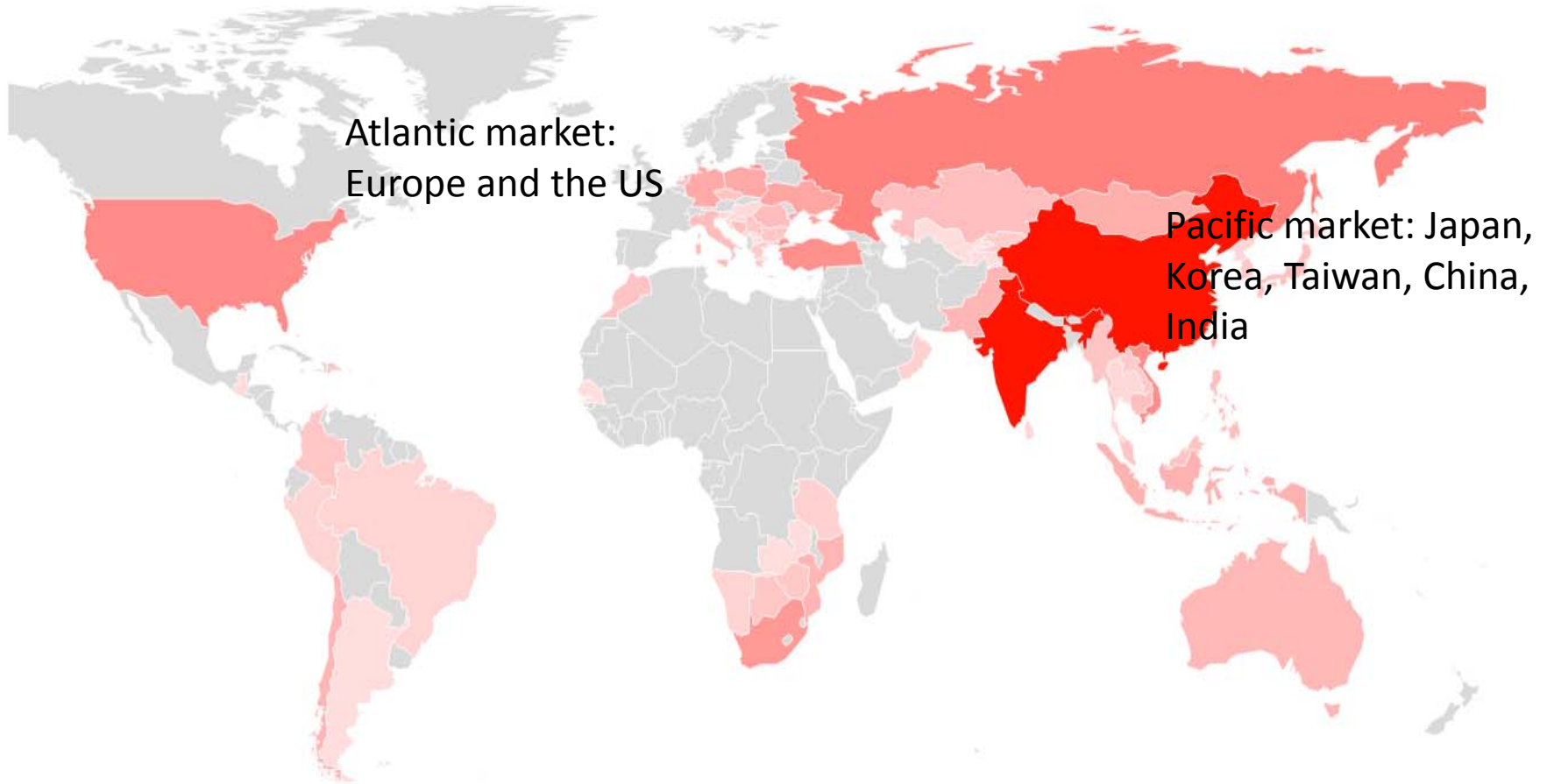
Top 10 power companies in terms of proposed new coal power capacity

Company Name	Number of Proposed Coal-fired Power Plants	Location of Proposed Plants	Ownership	Headquarter Location
Huaneng	66	China, Burma	State-owned	China
Guodian	55	China, Burma	State-owned	China
NTPC	47	India, Sri Lanka	State-owned	India
Datang	43	China	State-owned	China
Huadian	37	China	State-owned	China
China Power Investment	31	China	State-owned	China
Shenhua	19	China, United States	State-owned	China
Luneng	14	China	State-owned	China
Maharashtra State Power Generation Company	14	India	State-owned	India
JSW Group	12	India	Private Sector	India

Two important observations

- **Transnational operations** are becoming more common
 - Chinese companies – China, United States, Laos, North Korea, Burma, Cambodia, Mongolia, Pakistan and Vietnam...
 - Indian companies – Sri Lanka, Maldives, Nepal, Pakistan, Bangladesh and Turkey...
 - RWE (German) – Germany, Bulgaria, Netherlands and Poland
 - E.ON (German) – Germany, Italy, Netherlands and Romania
 - Eskom (South African) – Across Africa
- **State-owned power companies** play a dominant role in proposing new coal-fired plant projects in China, Turkey, Indonesia, Vietnam, South Africa, Czech Republic and many other countries.

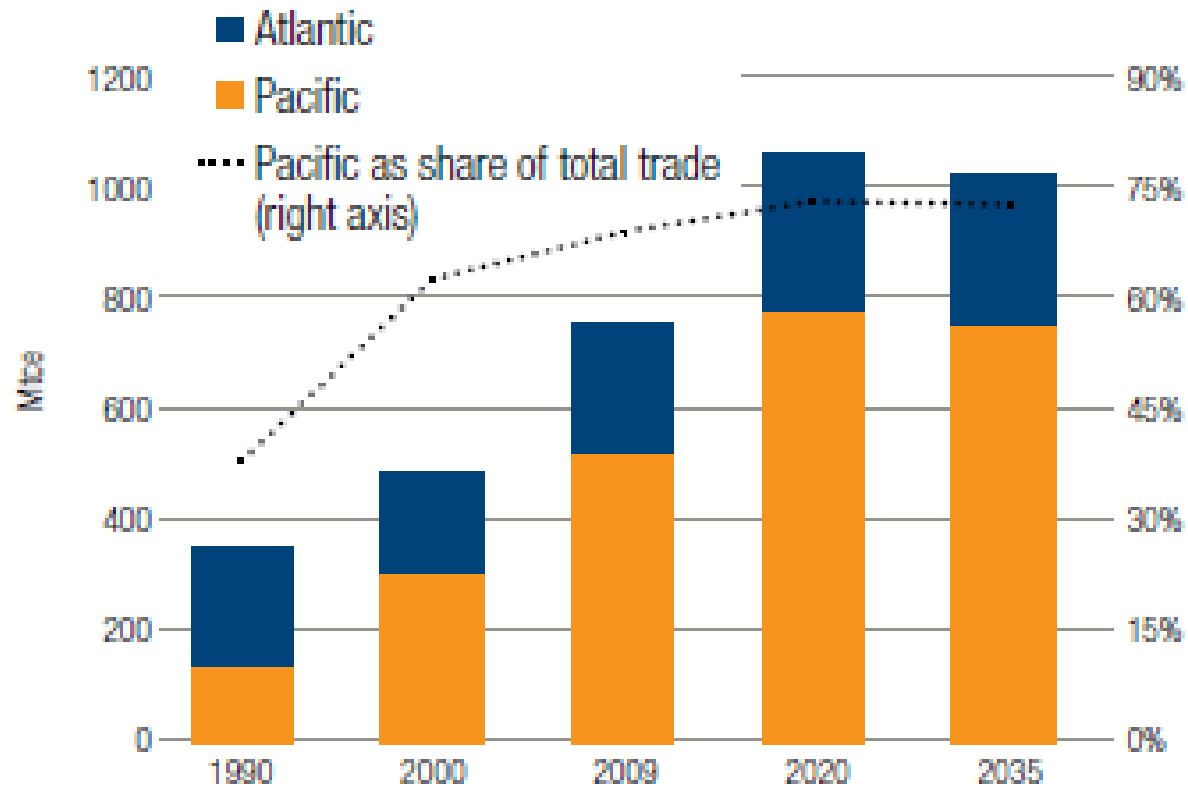
International Coal Trade - Demand



Top Coal Import Countries

Ranking	Country	Total Coal Import ¹	Total Coal Consumption ²	Import Percentage of Consumption
1	Japan	186.64	186.64	100.0%
2	China	176.96	3319.10	5.3%
3	South Korea	118.59	118.38	100.2%
4	India	90.14	658.74	13.7%
5	Taiwan	69.60	64.82	107.4%
6	Germany	45.73	227.92	20.1%
7	UK	26.52	51.29	51.7%
8	Russia	19.62	234.37	8.4%
9	France	17.59	17.35	101.4%
10	USA	17.56	959.11	1.8%
11	Spain	12.82	16.99	75.4%
12	Canada	12.64	47.12	26.8%
13	Belgium	2.45	2.87	85.3%

Market Trends

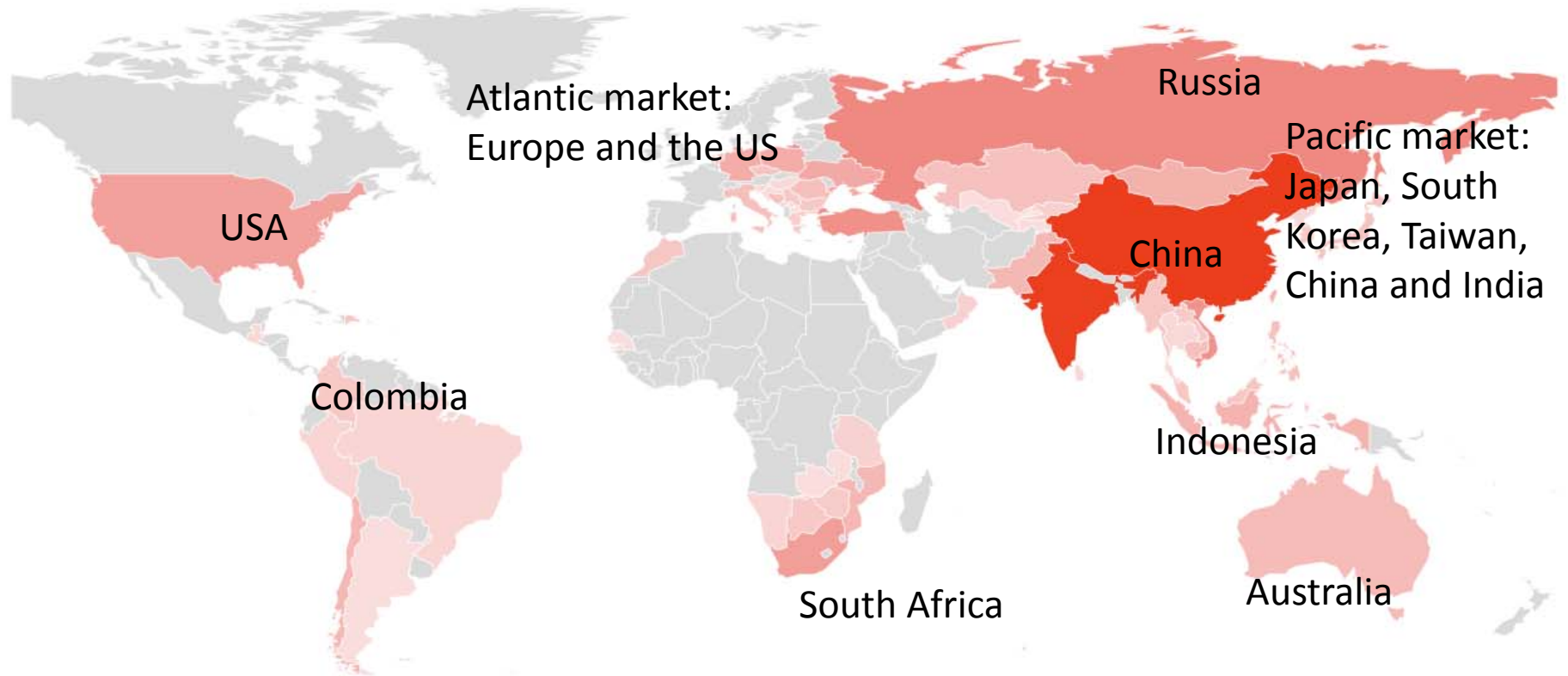


Source: IEA, 2011. World Energy Outlook 2011.

Top Coal Export Countries

Ranking	Country	Total Coal Export1	Total Coal Production2	Export Percentage of Production
1	Australia	297.68	420.26	70.8%
2	Indonesia	286.81	336.00	85.4%
3	Russia	108.96	323.90	33.6%
4	USA	74.13	997.13	7.4%
5	South Africa	69.57	254.73	27.3%
6	Colombia	68.49	74.35	92.1%
7	Canada	33.41	62.94	53.1%
8	Kazakhstan	32.89	110.80	29.7%
9	China	20.06	3162.19	0.6%
10	Poland	10.08	133.22	7.6%
11	Venezuela	6.18	8.79	70.3%
12	Ukraine	6.10	54.59	11.1%
13	India	2.07	570.68	0.4%

International Coal Trade - Supply



For more questions about the study,
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