



**Intesco
Research
Group**

WORLD COAL MARKET AND RUSSIAN COAL MARKET



MOSCOW 2012

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RESEARCH METHODOLOGY

Subject of research:

RUSSIAN AND WORLD COAL MARKET

Goal of research:

EVALUATION OF THE CURRENT MARKET CONDITION AND FORECAST OF
ITS DEVELOPMENT FOR 2013-2015

Region of research:

WORLD, RUSSIA AND REGIONS OF RUSSIA

Main blocks of research:

WORLD COAL MARKET

VOLUME OF THE RUSSIAN COAL MARKET

SEGMENTATION OF THE RUSSIAN COAL MARKET

TRENDS ON THE RUSSIAN COAL MARKET

FACTORS, INFLUENCING THE MARKET

STATE REGULATIONS OF THE MARKET

THE LARGEST PLAYERS ON THE RUSSIAN MARKET

COAL EXTRACTION IN RUSSIA

COAL PROCESSING IN RUSSIA

ANALYSIS OF COAL IMPORT

ANALYSIS OF COAL EXPORT

PRODUCER PRICES FOR COAL IN RUSSIA

THE LARGEST RUSSIAN PRODUCERS

TRADERS

COAL CONSUMPTION

PROFILES OF THE LARGEST ENTERPRISES PRODUCING COAL

FORECAST OF COAL MARKET DEVELOPMENT FOR 2013–2015

The market is segmented:

BY TYPES OF COAL**The largest Russian enterprises with profiles:**

«SIBIRSKAYA UGOLNAYA ENERGETICHESKAYA KOMPANIYA» JSC

SUBSIDIARY OF «SUEK» JSC - «SUEK-KRASNOYARSK»

«UK KUZBASSRAZREZUGOL» JSC

«YUZHNIY KUZBASS» JSC

«YAKUTUGOL» KHK JSC

Production volumes, financial activities data, balance sheets, profit and loss statements, cash-flow statements, the subsidiaries and other data about these main companies were presented.

Information sources used:

FEDERAL STATE STATISTICS SERVICE

MINISTRY OF ECONOMIC DEVELOPMENT

FEDERAL CUSTOMS SERVICE

FEDERAL TAX SERVICE

EVALUATIONS OF FIELD'S EXPERTS

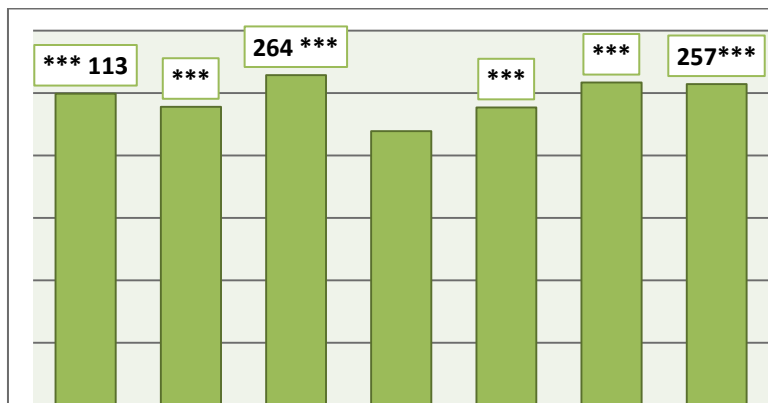
MATERIALS OF THE MAIN PLAYERS

FIELD PRINT AND ELECTRONIC PUBLICATIONS

Research contains 76 schedules, 56 diagrams and 76 tables.

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VOLUME OF THE RUSSIAN COAL
MARKET

Dynamics of the Russian coal market in 2006-2012*, ths tons

In 2006-2011 the Russian coal market increased by 3*,5%. According to analysts of Intesco Research Group in 2011 it grew by *,3% (2**,,* mln tons). Market growth in 2010-2011 was due to an increase of output by domestic enterprises and the increase of coal import from member countries of the Customs Union of the EurAsEC.

structure of the Russian market in 2011 amounted to *,6%. Domestic market of coal fuel was represented by products of the Russian enterprises (8*,4%).

The share of imported coal in the



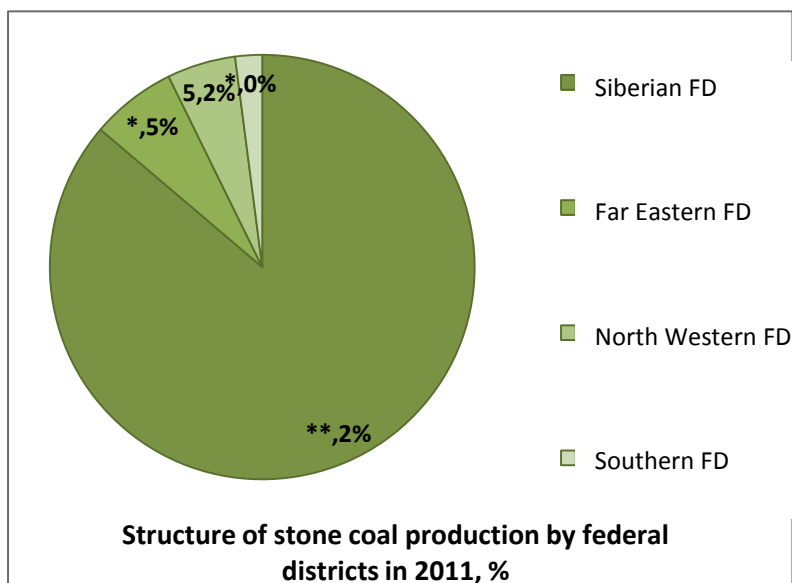
Import content on the Russian coal market in physical terms in 2011, %

the

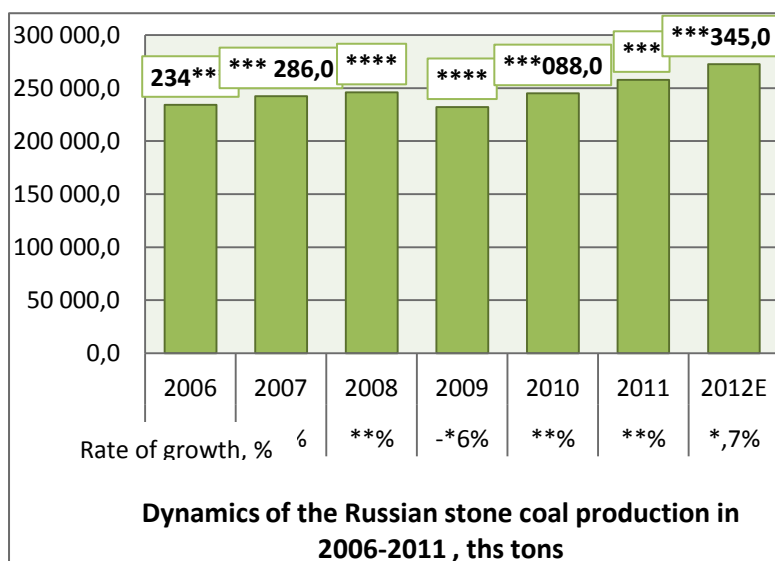
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COAL EXTRACTION IN RUSSIA

In 2011 Siberian FD extracted 86,2% of stone coal. 6,5% of production belonged to Far Eastern FD. North Western FD and Southern FD had 5,2% and 2% of extracted coal, respectively.



In 2006-2011 production of stone

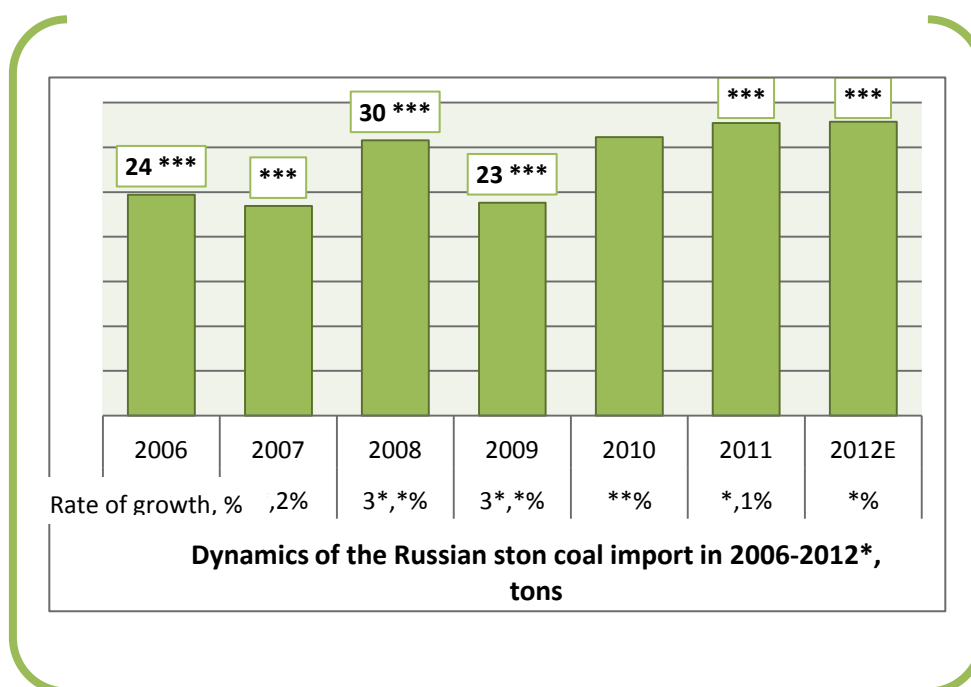


coal showed a positive dynamics, the only exception was 2009 when the rate of growth was equal to *,6%, and extraction volumes decreased by 13,9 mln tons. In 2011 volume of stone coal extraction was at the level of ***,7 mln tons. The rate of growth amounted to 5,1%, growth of production volume to **,6 mln tons.

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In 2006 – 2010 an increase of the Russian stone coal import was marked, volumes of fuel import in physical terms increased in 2010 by *6% compared to 2006 and amounted to **,1 mln tons.

According to analysts of Intesco Research Group volumes of coal import increased by *,1% in 2011.



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Table 73. Balance sheet of «KHK Yakutugol» JSC, ths rubles

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18. FORECAST OF COAL MARKET DEVELOPMENT FOR 2013–2015

Schedule 75. Dynamics of the Russian coal market volume in 2009–2012* and forecast for 2013–2015, tons

Schedule 76. Dynamics of import content on the coal market in physical terms in 2009–2015, %

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