

COAL LOGISTICS-2025

CONFERENCE

FEBRUARY 6-7, 2025 | Hilton Moscow Leningradskaya

Registration on the website rusmet.ru

coal@rusmet.ru +7(495) 980-06-08



ANNOUNCEMENT

"Coal logistics" is a comparable challenge in the work of the coal industry of Russia, along with sanctions. Our country is the third largest coal exporter in the world after Indonesia and Australia. The Ministry of Energy expects that by the beginning of 2030 the Russian Federation will be able to increase coal supplies abroad by at least a third, with India becoming the leader in its purchases.

In addition, the ministry expects that coal supplies from Russia to China will return to a level of at least 100 million tons from 2025.

At the same time, in the main markets where we can sell coal, the cost of logistics is many times higher than the cost of production. Depending on the region, logistics accounts for 50 to 90% of the cost of coal in the final market.

It is necessary to increase coal shipments to the Far East as a priority. Russian Railways' work in terms of infrastructure development, implementation of new technologies, preservation and renewal of the locomotive base, and innovative wagons is important. Port capacities are required, including increasing the possibility of shipping coal over long distances on ships with large deadweight to minimize freight rates in logistics. Of course, not only export routes are important, but also uninterrupted supplies to the domestic market.

These and many other strategic issues will be discussed at the conference "Coal Logistics-2025", which will be organized by the Rating Agency Rusmet on February 6-7, 2025 at the Hilton Leningradskaya Hotel in Moscow.

PROGRAMME STRUCTURE

SESSION 1 REGULATION

Trends in state regulation in the Russian Federation, international rules of foreign economic activity, assessment of legal and economic risks, proposals for adjusting the regulatory framework. Speeches by the Ministry of Energy, the Ministry of Transport, the Ministry of Industry and Trade, the Central Energy Customs, RA Rusmet, experts, analysts.

SESSION 2 ANALYTICS

Dynamics of indicators of production, consumption, prices and logistics of coal in the Russian Federation and the world. The influence of logistics on indicators of the coal industry, assessment of the cost of logistics in the cost structure in different countries.

Speeches by operators, carriers, stevedoring companies, experts

SESSION 3 INFRASTRUCTURE

Sufficiency of infrastructure and non-discriminatory access to coal transportation infrastructure. Updating coal transportation methods by rail and water.

Systemic changes in the structure of settlements for export and prospects for changing financial transactions for coal export deliveries.

Conference organizer -
 Rating agency Rusmet is a brand with a 27-year history of creating analytics, events, GR and PR support for Rusmet.ru projects. The portfolio includes competencies in metal and metallurgical raw materials markets, including coal industry analytics, systematic price index management, analysis of logistics indicators, domestic and export markets.

Hard coking coal

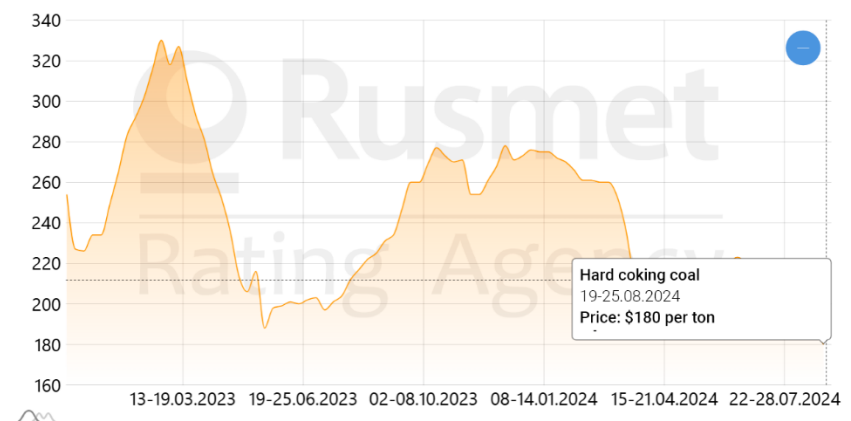
* prices are in \$ per ton

hard coking coal

\$/t 180 ↓ -4.26%

Date of data update

19-25 of August 2024



Picture 1



- **COMPREHENSIVE MARKET ASSESSMENT**
- Coal and freight market analysis in dynamics for 2021-2025, with a forecast up to 2030
- Assessment of transport infrastructure and the impact of logistics on coal market efficiency.



- **STRATEGIC DECISION-MAKING**
Assessment of the effectiveness of state regulation and the regulatory framework
- Signing of an appeal from businesses to government bodies and key industry institutions following the conference



- **EXCHANGE OF EXPERIENCE AND OPINIONS WITH LEADERS**
- Expert discussions
- Interactive monitoring and surveys
- Networking

CONDITIONS AND GOALS OF PARTICIPATION

DELEGATE

50 000,00 RUB. for the participation of the **FIRST** delegate from the organization, **35 000,00 RUB.** for the participation of the **SECOND** and following delegates. Included: business and cultural program, coffee breaks, lunches, analytical materials, information handouts, transfer and support during the technical tour and excursion

ADVERTISING TABLE

250 000,00 RUB. Included: participation of 3 delegates, 1 table, chairs, space for banners, power outlet, basket, Internet, demonstration of a promo video up to 2 minutes, inclusion of advertising and promotional materials in the delegate package or placement in the hall in the audience seats (provided by the participant), A4 advertising layout in the catalog, participation in the business and cultural program, coffee breaks, lunches, analytical materials, information handouts, transfer and support during the technical tour and excursion

SPONSOR

500 000,00 RUB. Included: participation of 5 delegates, 2 tables, chairs, space for banners, power outlet, basket, Internet, demonstration of a promo video up to 3 minutes, inclusion of advertising and promotional materials in the delegate package and placement in the hall in the audience seats (provided by the participant), announcement of the sponsor status by the moderator, indication of the sponsor status in printed and demonstration materials, advertising spread in the catalog, written greeting of the sponsor's representative in the catalog, 15-minute speech, participation in the business and cultural program, coffee breaks, lunches, analytical materials, information handouts, transfer and support during the technical tour and excursion
Not included: personal transportation expenses, accommodation

GOLDEN SPONSOR

750 000,00 RUB. Included: participation of 7 delegates, 2 tables, chairs, space for banners, power outlet, basket, Internet, demonstration of a promo video up to 3 minutes, inclusion of advertising and promotional materials in the delegate package and placement in the hall in the audience seats (provided by the participant), announcement of the sponsor status by the moderator, indication of the sponsor status in printed and demonstration materials, advertising spread in the catalog, written greeting of the sponsor's representative in the catalog, 15-minute speech, participation in the business and cultural program, coffee breaks, lunches, analytical materials, information handouts, transfer and support during the technical tour and excursion
Not included: personal transportation expenses, accommodation

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EXPERT OPINION

**By 2026,
more than
70% of coal
consumption
will come
from India
and China
alone.
Russia will
remain
among the
top three
coal
exporters**

Coal: Demand trends in the context of decarbonization

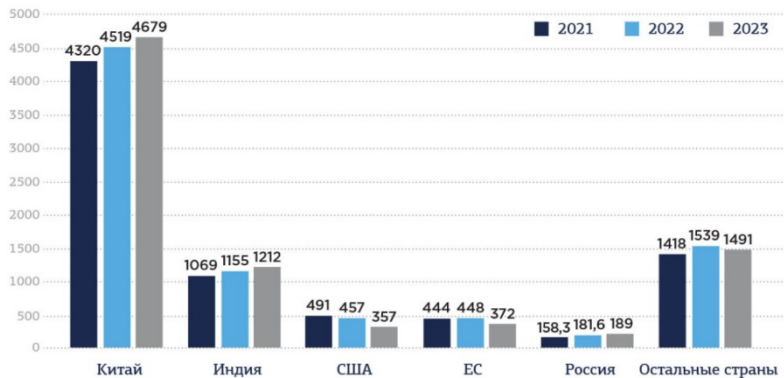
The global coal market continues to remain active and stable, despite promises and plans to decarbonize the energy sector. Data from the International Energy Agency shows growing demand for coal, especially in China, India and Indonesia.

In 2023, coal production reached a record level, and its prices approached the maximums reached in 2022. This is primarily due to energy instability in China and growing demand for coal in India.

If in 2000, developed economies accounted for about 50% of coal consumption, then by 2026 more than 70% of this consumption will be accounted for by India and China alone, RA Rusmet reports. The Russian Ministry of Energy is based on last year's figures in its forecasts: 440 million tons of coal production and 220 million tons of exports (Vedomosti cites data). The State Council Commission on Energy believes that 2024 could be a loss-making year for the industry, given price volatility, tariffs in China, and rising production costs and export deliveries (Sber Pro and Kommersant write).

Growing demand for coal in Asian countries, especially in China and India, has a significant impact on the global coal market, supporting production and prices for this energy source. India has increased coal production to over 1 billion tons, which is in line with government plans. However, the volatility of prices for thermal and coking coal on world markets, the increase in the cost of logistics and transshipment in the Russian Federation, the congestion of railways in the eastern direction, the introduction of import duties from the beginning of 2024 in China complicate the activities of Russian coal mining companies.

Рис. 1. Мировое потребление угля — главные страны-потребители, 2021-2023, млн



Источник: отчет МЭА, Минэнерго РФ

World coal consumption - main consumer countries, 2021-2023, million



COAL LOGISTICS CHALLENGES AND SUPPORT MEASURES

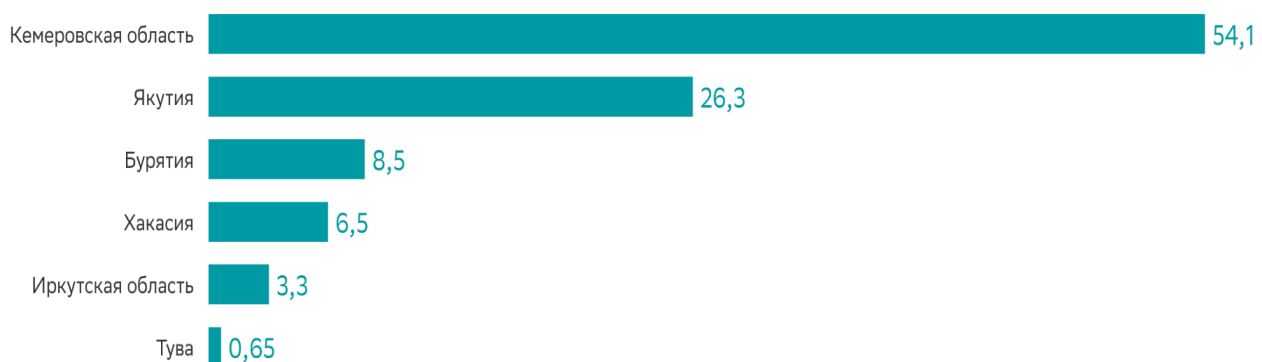
Coal export transportation decreased in 2024, the reason is not only volatile demand, but also logistics. According to Sber Pro, due to the reorientation of foreign trade from Europe to the Asia-Pacific region (APR), the flow of goods through eastern ports has increased sharply. The quota for coal transportation by rail in 2024 has been increased by 6% compared to 2023, to 100 million tons. Quotas ensure that goods are delivered to the railways first. However, due to high workload, difficulties have arisen with the timely transportation of coal through the ports of the Far East. The delay in deliveries to the Asia-Pacific countries reached a month in 2024, according to a report by the Bank of Russia. Increasing the capacity of railways can solve the problem of coal export.

The authorities are discussing measures to support industry participants (from the report of the Ministry of Energy, with reference to Kommersant). Options:

- continue negotiations with China on the abolition of import duties on Russian coal;
- allocate regional quotas for the export of export coal not only to the east, but also to the northwest and south;
- recommend that operators set transshipment tariffs at the average market level and not deviate from it by more than 20%;
- abandon the Australian coal index when calculating the mineral extraction tax on coking coal;
- do not increase the mineral extraction tax for coal miners during the period of sanctions;
- exclude mechanisms for exchange rate export duties on coal.

In addition, according to experts, in addition to the accelerated modernization of railways, it is necessary to return the reduction coefficients for the railway transportation of coal for export, introduce discounts on the railway shipment of coal for export in the direction of northwestern and southern ports, and stabilize the cost of transshipment in ports.

Volumes of planned coal deliveries from Siberian regions by rail in 2024, million tons



Source: Interfax



VENUE

The Hilton Moscow Leningradskaya Hotel is located in one of the Stalinist skyscrapers in the center of Moscow, within walking distance of 3 central railway stations: Leningradsky, Kazansky and Yaroslavsky; the Komsomolskaya and Krasnye Vorota metro stations, as well as the Ploshchad Trekh Vokzal station, the MCD-2 and MCD-4 ground metro lines. Red Square and the Kremlin museums can be reached by metro.

Hotel 5* Hilton Moscow Leningradskaya

The hotel has all the amenities for both business and leisure travelers. Guests can enjoy the Janus restaurant, where a buffet breakfast is served in the morning, and the lobby bar, which offers traditional Russian and international cuisine throughout the day. The hotel also offers room service, a concierge, an ATM, laundry and dry cleaning.

The hotel offers a wellness center for guests: a swimming pool, a jacuzzi, a sauna and a gym, included in the price of accommodation. Free Wi-Fi is available throughout the hotel, including rooms.

Hotel address: Kalanchevskaya st. 21/40, Moscow

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