


Coal or Renewables

# COMPETE or COMPLEMENT

IHS Markit Southern African Coal Conference 2019

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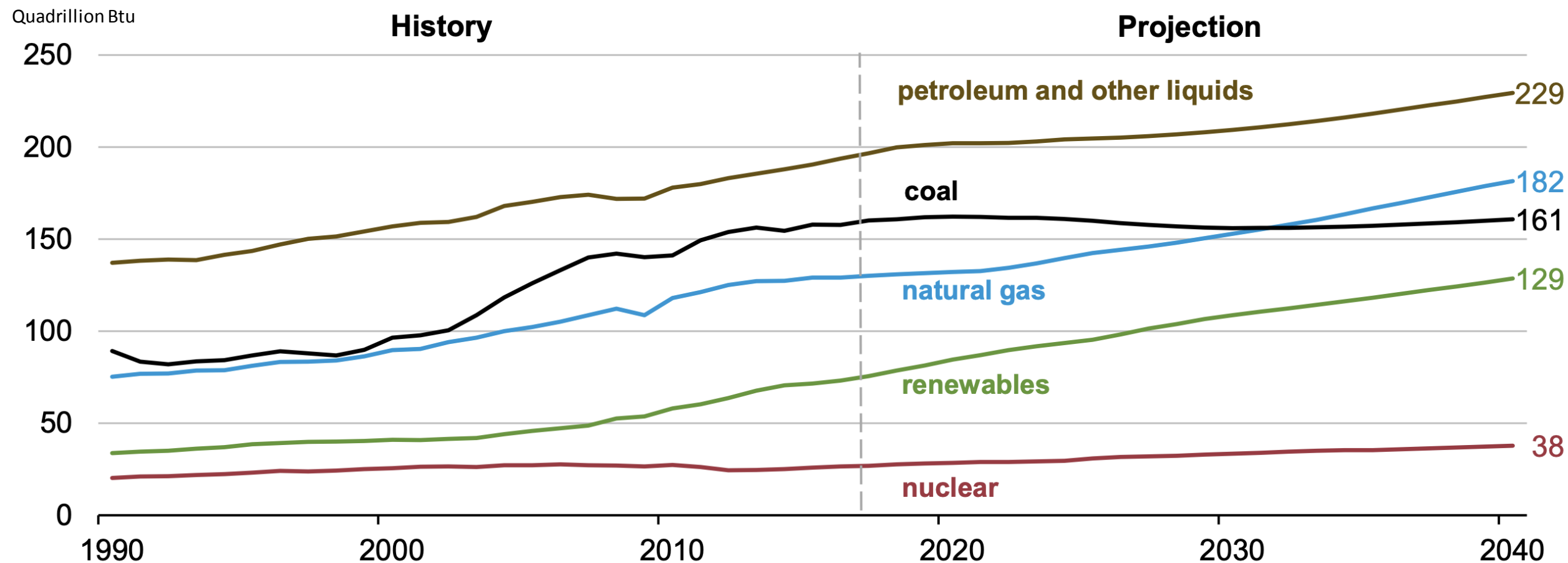


# WORLD ENERGY CONSUMPTION BY ENERGY SOURCES

Source: U.S. Energy Information Association (EIA) International Energy Outlook 2018

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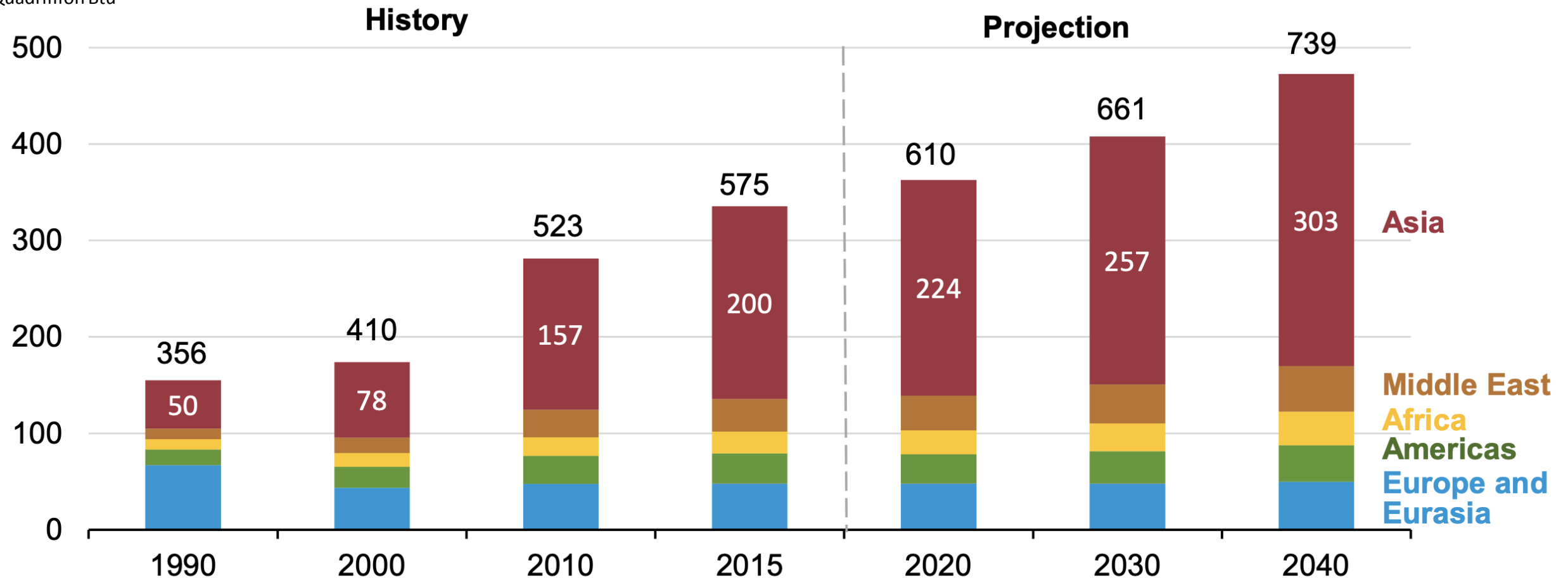
# ENERGY CONSUMPTION BY REGION

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Source: U.S. Energy Information Association (EIA) International Energy Outlook 2018

Quadrillion Btu

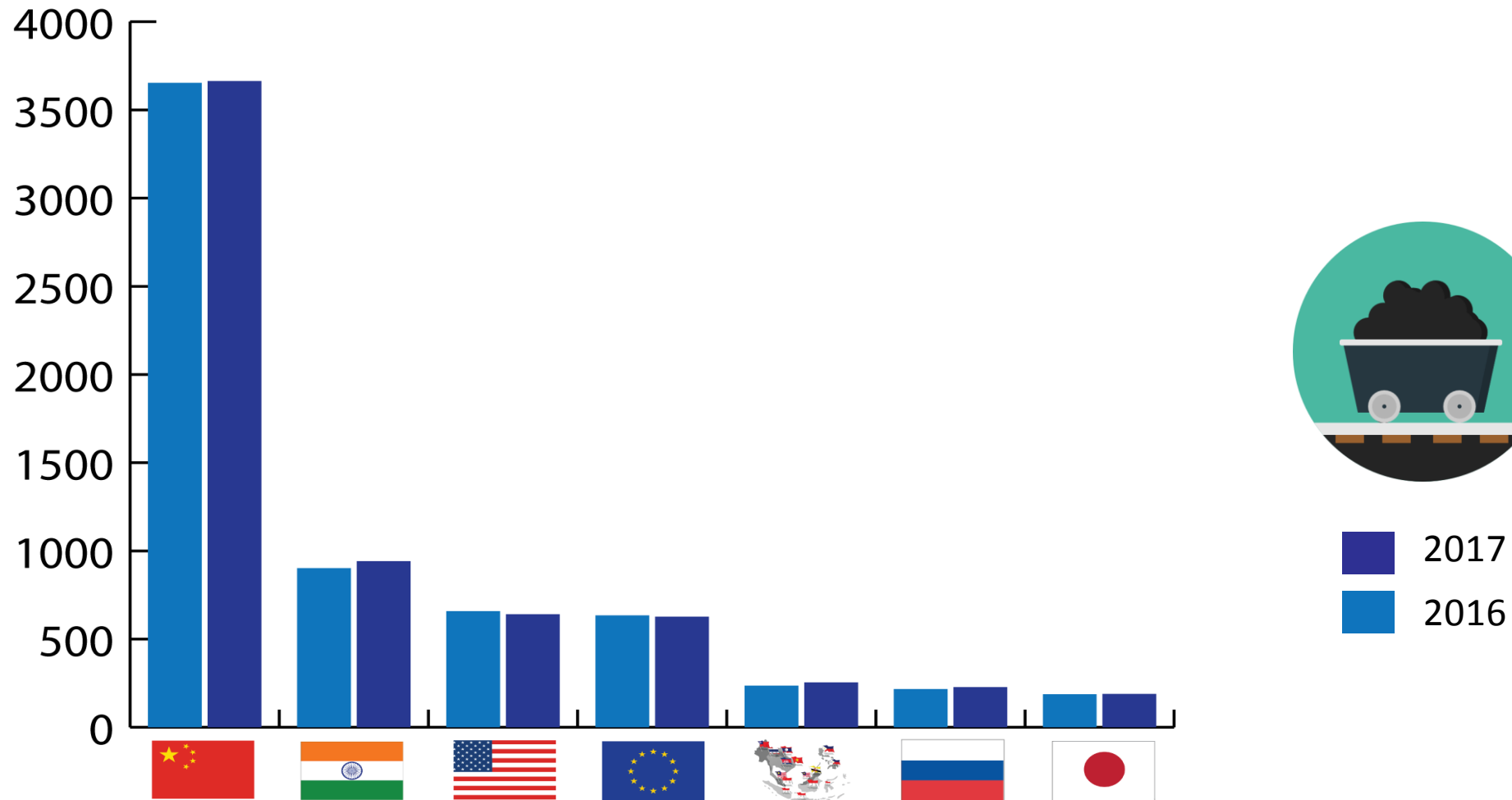


# TOTAL COAL CONSUMPTION (Mt) 2017

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Source: International Energy Agency - Market Report Series: COAL 2018

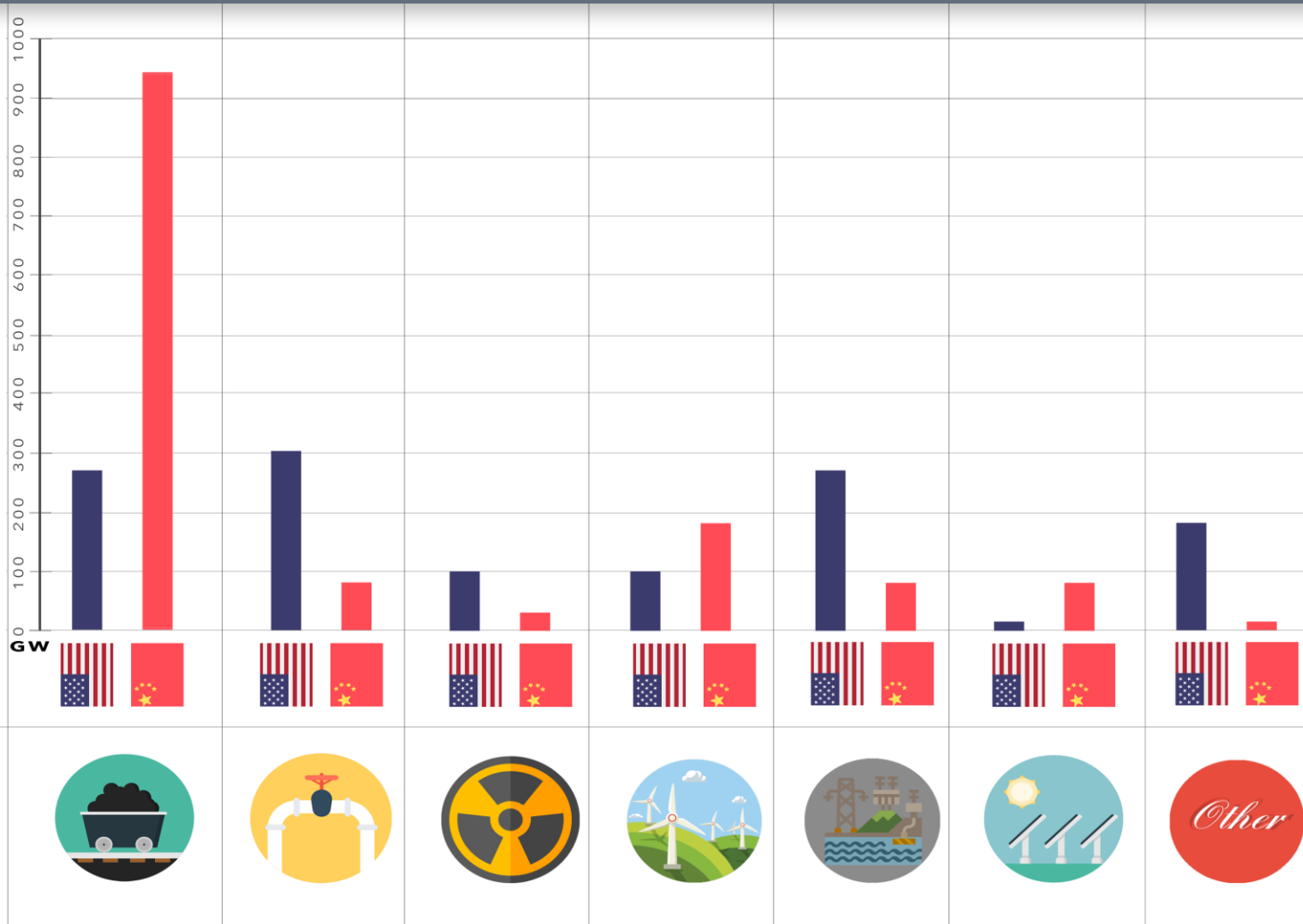


# U.S. AND CHINA ELECTRICITY SUPPLY SOURCES (GW) 2017

Source: EIA; China's Energy, National Energy Administration

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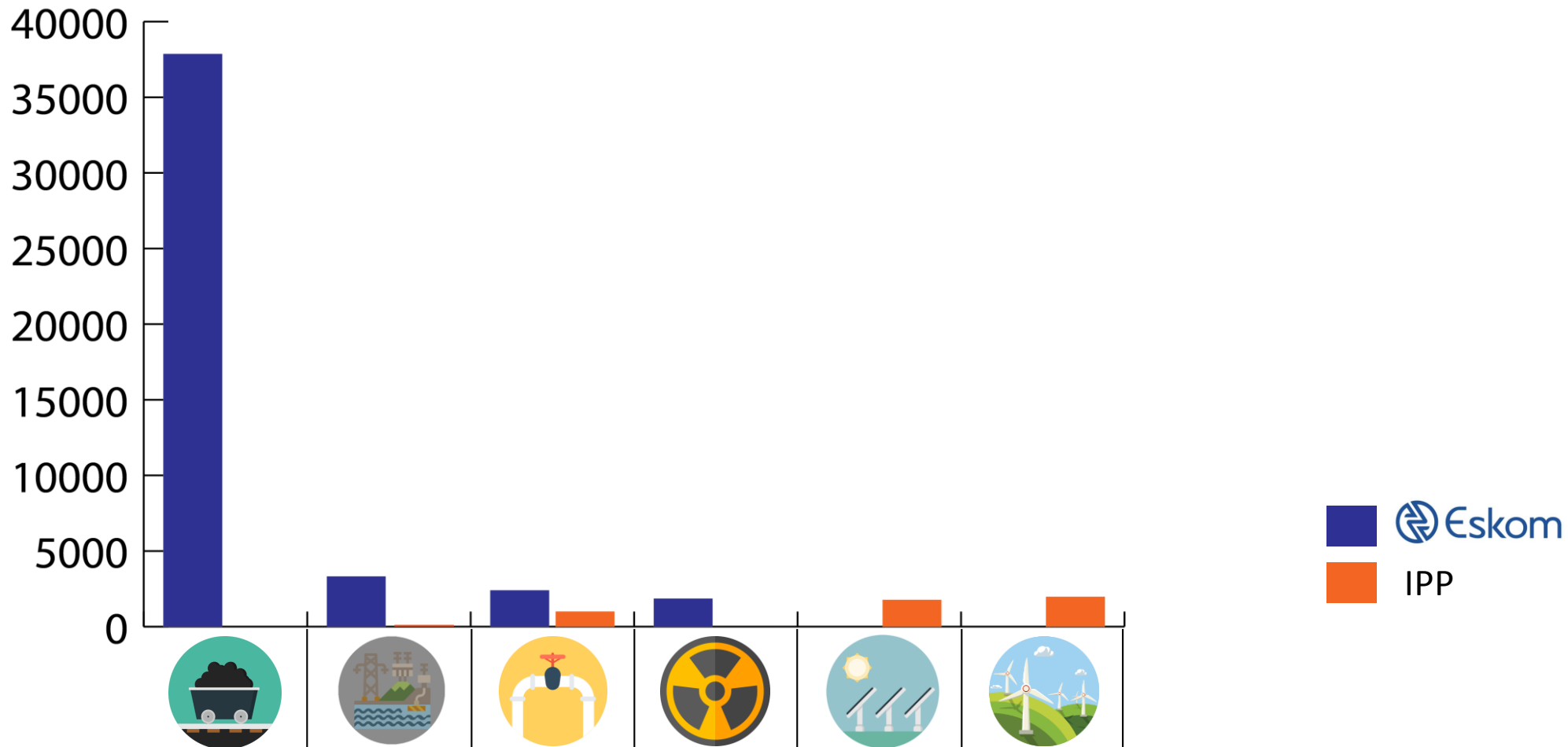


# 2017 SA ELECTRICITY SUPPLY SOURCES (MW)

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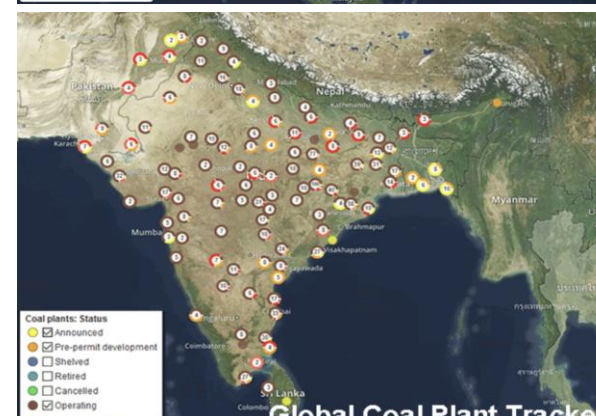
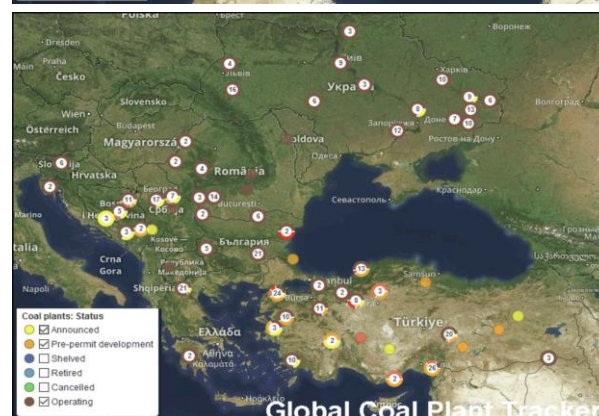
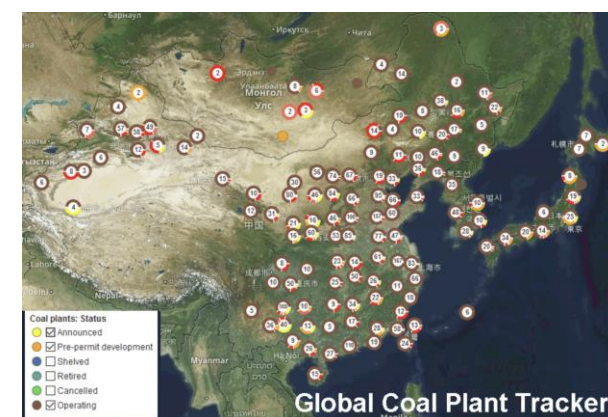
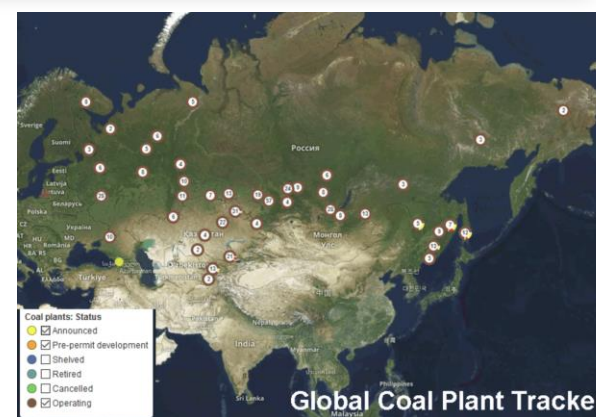
Source: ESKOM Integrated Report 2017



# 1600 NEW COAL PLANTS IN 62 COUNTRIES

Source: Global Coal Plant Tracker Portal - 2019

Over all, 1,600 coal plants are planned or under construction in 62 countries. The new plants would expand the world's coal-fired power capacity by 43 percent.



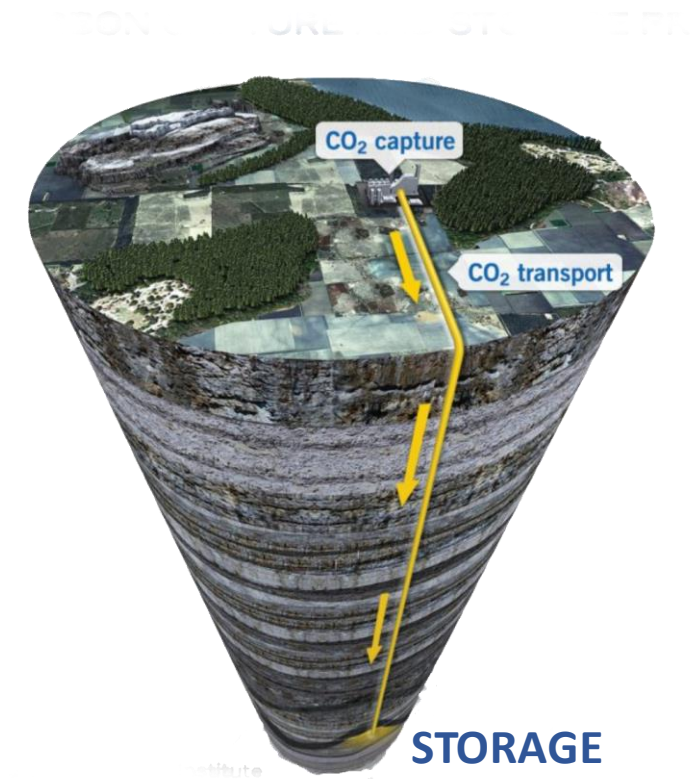
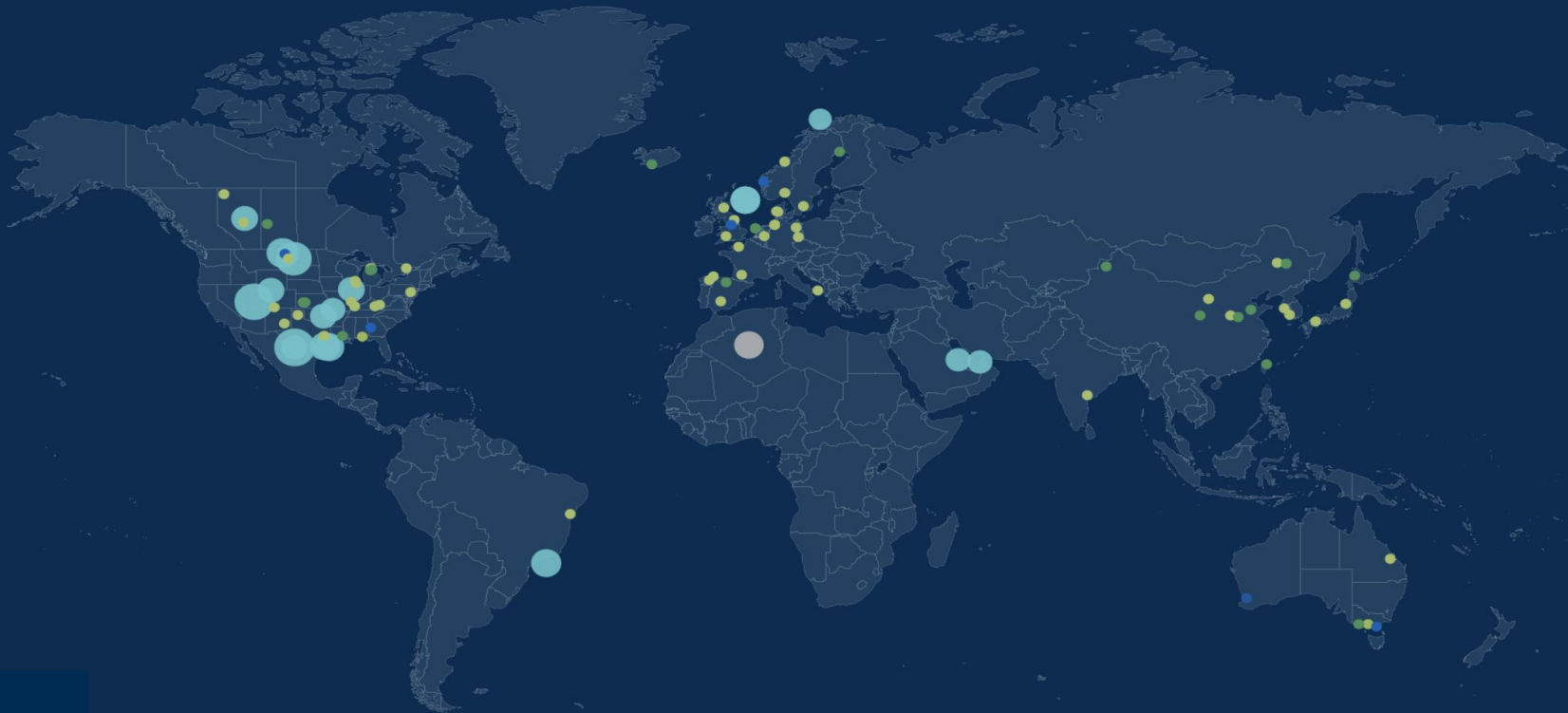


# THE CARBON CAPTURE AND STORAGE

Source: <https://www.globalccsinstitute.com/>

Capturing CO<sub>2</sub> at the source, compressing it for transportation and then injecting it deep into a rock formation at a carefully selected and safe site, where it is permanently stored.

## The world of GLOBAL CCS



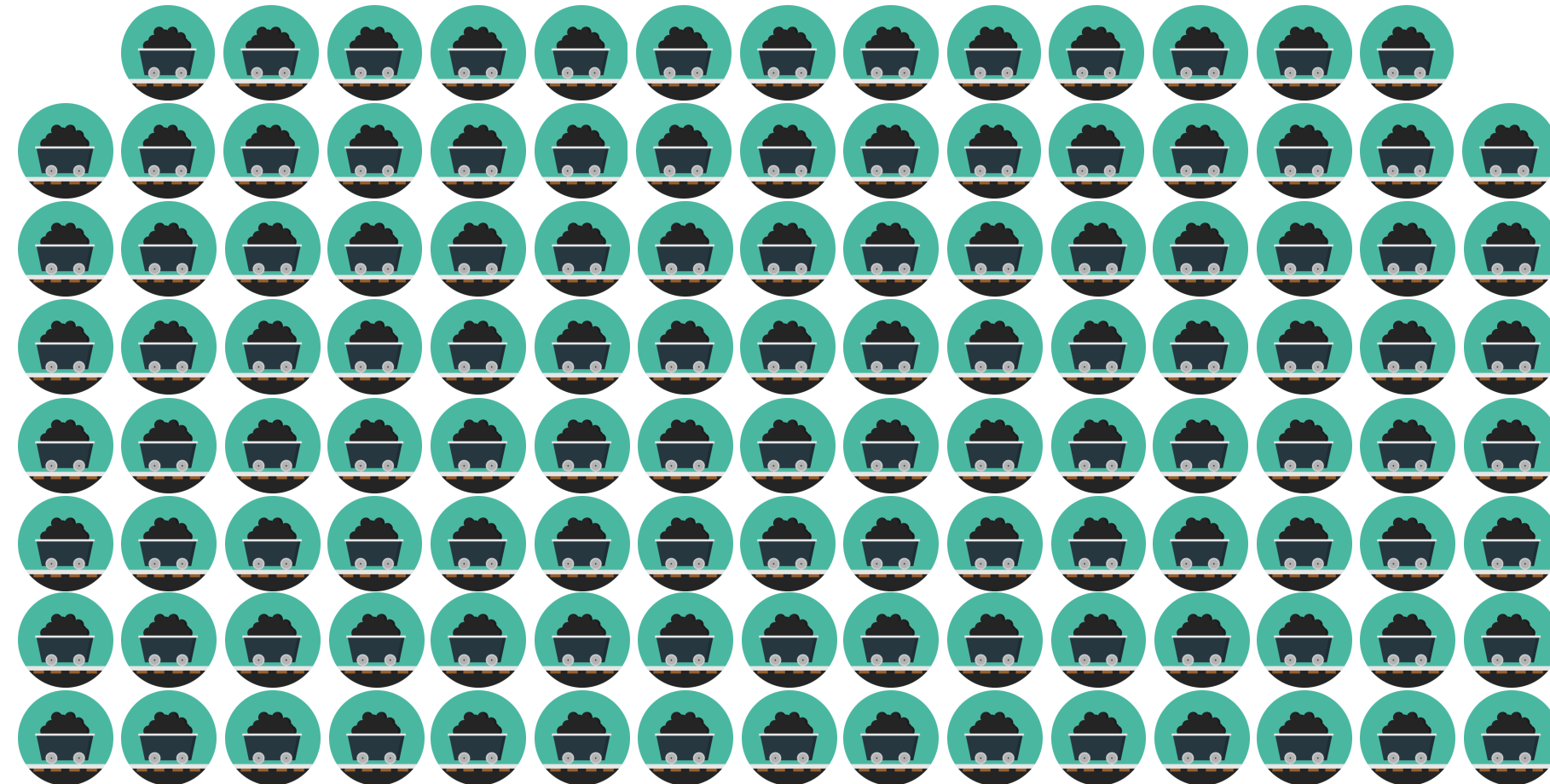


# SA COAL RESERVE FOR 118 YEARS

Source: Mineral Council South Africa

PRODUCTION: 260 Mton/annum  
EXPORT: R72 million/annum  
EMPLOYEES: 86 235 (March '18)  
WAGES: R25 billion in wages

## TOTAL RESERVE (30.8 billion tons)



Yearly production



Major listed mining companies currently supplying coal to Eskom and international markets

## Coal Resources of SA as of end June 2017

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		Mt
Exxaro	Grootegeeluk	3926
Exxaro	Matla	641
Exxaro	Dorstfontein	300
Exxaro	Thabametsi	270
Exxaro	Arnot	203
Exxaro	Others	270
South32	Leandra	1722
South32	Khutala	1247
South32	KPS+KPSX	649
South32	Wolvekrans	843
South32	Naudesbank	243
Glencore	Tweefontein	875
Glencore	Goedgevonden	515
Glencore	Impunzi	380
Glencore	Umcebo	178
Glencore	Others	575
Seriti		585
?	Optimum	657
AngloAmerican	Zibulo	349
AngloAmerican	Goedehoop	210
AngloAmerican	Others	160

