



Indian Coal Markets Conference

March 21-22, 2024 | Taj Bengal, Kolkata

www.indiancoalmarkets.com



BLACK TO GREEN: Building a sustainable future for coal

AGENDA

Day 1: March 21, 2024

10.00-11.30

Inaugural Session:

Alpha meter: How Green is my coal?

- India's coal production expected to cross 1 bn tons in FY24
- Coal's share in generation-mix has moved up in consecutive years
- India's per capita CO₂ emission growth far outpaces G20 average

10.00-10.10

Welcome Address:

Vinaya Varma, MD & CEO, mjunction services limited

10.10-10.25

Keynote Address:

Amrit Lal Meena, Secretary, Ministry of Coal, Govt. of India

Coal vs energy transition: how does India plan to walk the middle path?

10.25-10.40

Inaugural Address:

P M Prasad, Chairman, Coal India Ltd.

Green mining avenues: The CIL way

10.40-10.55

Special Address:

Michelle Manook, CEO, FutureCoal Global Alliance (FCGA) (Formerly WCA)

Outside in view: Is India doing enough to keep coal a sustainable proposition?

10.55-11.10

Concluding Address:

Sanket Singh, Partner, Grant Thornton

Coal's transition: Opportunities & challenges in coal gasification, CCUS & beneficiation

Q&A: 11.10-11.30

Tea Break: 11.30-11.45



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11.45-13.15

Plenary Session:

Angle of repose: How big can (commercial) coal get?

- Will India see a surplus capacity by next 5 years?
- Is there a convincing case for export of Indian coal?
- What should India do with its 180 bn tons of (proven) reserves?

Chairman:

11.45-12.00

Special Address

M Nagaraju, Additional Secretary, Ministry of Coal, Govt. of India

What is the upside for commercial coal mining in India?

Speakers:

12.00-12.15

Sariputta Mishra, Director & CEO, Odisha Coal and Power Ltd (OCPL)

Commercial mining: Current headwinds and how to overcome them?

12.15-12.30

Sanjay Dutt, Director, Trident Chemphar

Will commercial coal find its way to the market?

12.30-12.45

Om Prakash, Executive VP, Mines, Jindal Power

ESG norms: How will it impact the cost and productivity for commercial mines?

12.45-13.00

Shubham Goel, VP, SBI Caps

Status of funding requirements and credit availability at commercial blocks

Q&A: 13.00-13.15

Lunch Break: 13.15-14.00



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14.00-15.00

Session 3:

Rubbing surface: Techno-commercial viability of India's new coal projects

- Can commercial miners take on PSUs in terms of cost & operational efficiency?
- What is the future of underground mining in India?
- How has the shift from underground affected factor productivity?

Chairman:

Dipankar Banerjee, CEO & Whole-time Director, Gainwell

14.00-14.45

Panel Discussion:

Dipankar Banerjee, CEO & Whole-time Director, Gainwell

Prasenjit Maity, National Head – OE Sales, Underground Soft Rock, Komatsu-Joy Global

Sauro Jyoti Ray, Business Head (Mining), Sany Heavy Industry India Pvt. Ltd.

Q&A: 14.45-15.00

Tea Break: 15.00-15.30

15.30-16.15

Special Session:

Supply outlook from India's largest coal miner

Speakers:

15.45-16.00

Mukesh Choudhary, Director (Marketing), Coal India Ltd (CIL)

Import substitution: CIL's initiatives to make thermal coal buyers homeward-bound



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16.00-16.15

Samiran Dutta, CMD, Bharat Coking Coal Ltd. (BCCL)

Mission Coking Coal: Supply outlook from India's largest met coal miner

16.15-16.30

Debasish Nanda, Director (Business Development) and Director (Finance) – Addl. Charge

From coal to lithium: CIL's search for new horizons

Q&A: 16.30-16.45

16.45-18.00

Session 5:

Ultimate Analysis: Global coal market amidst energy shocks & Green wave

- How will the seaborne coal prices fare in 2024?
- Will the reduction in coal's use in generation be offset by industrial sector?
- Can Asia sustain coal's growth defying structural decline in other markets?

Chairperson:

Michelle Manook, CEO, FutureCoal Global Alliance

Speakers:

16.45-17.00

Freddie Staermose, VP, Generation Fuels & Dry Bulks, Argus Media

Seaborne thermal coal prices: What does 2024 hold in store?

17.00-17.15

S&P Global

Seaborne met coal market: A mid-term outlook on demand and prices

17.15-17.30

Representative from Russian coal industry

Russia's focus on Asia: What is the long-term strategy?

17.30-17.45

Derek Langston, Global Head of Dry Cargo Research, Braemar plc, UK

Ocean freight rates: A short and mid-term outlook



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Q&A: 17.45-18.00

Networking Break: 18.00-18.30

Awards Night & Cocktail Dinner: 18.30-21.30

Day 2: March 22, 2024

10.00-11.15

Session 6:

Crosscut: Country Focus: South Africa

- Net Zero pledge & rolling power blackouts: How SA is bracing for the twin challenges?
- Will increasing domestic appetite impact export volumes?
- How effective will CIF be in changing SA's energy-mix?

Chairman:

Divyesh Kalan, CEO, Orevest

Speakers:

10.00-10.15

Grindrod Logistics Ltd

Dwindling coal exports: How can SA address its rail bottlenecks and stage a rebound?

10.15-10.30

Thungela Resources

Increase in domestic appetite and its impact on Export volumes

10.30-10.45

XMP Consulting

Boom & bust: what is the mid-term price outlook for RBCT coal?

10.45-11.00

Divyesh Kalan, CEO, Orevest

SA's emerging miners: Is there an opportunity for Indian JVs/funds?



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Q&A: 11.00-11.15

Tea Break: 11.15-11.30

11.30-12.45

Session 7:

Angle of dip: Changing share of coal in India's power mix

- What is the power sector's roadmap to phase down coal?
- Global coal gasification market to grow 3X in 10 years
- What is the status of adoption of super critical technology?

Chairman:

Rabi Chowdhury, MD (Generation), CESC Ltd, & MD, Haldia Energy

Speakers:

11.30-11.45

Pradipta K Mishra, ED (Fuel), NTPC Ltd.

Power sector's coal demand: Impact of RE, emission norms and efficiency gains

11.45-12.00

Kirtiraj Jilkar, EVP, Thermax Ltd.

Coal gasification: Growth opportunities in India's power sector

12.00-12.15

C N Singh, Executive Director, Jindal Power

Can Indian power plants shun imported coal?

12.15-12.30

Indian Railways

Can Railways cope with the power sector's ever-growing coal requirements?

Q&A: 12.30-12.45

Lunch Break: 12.45-13.30

13.30-14.30



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Session 8:

Break Line: Coal woes easing in non-power sectors?

- Coal supply to India's NRS sectors up 30 mt till Q3FY24
- Share of non-power sectors in thermal coal import remains high at 78%
- Pet coke imports by India up 11%

Chairman:

Puneet Dalmia, MD & CEO, Dalmia Cement (Bharat)

Speakers:

13.30-13.45

Puneet Dalmia, MD & CEO, Dalmia Cement (Bharat)

Decarbonization in cement: what will be the impact on coal demand?

13.45-14.00

Prashant S Pathak, Group Head Procurement, Nuvoco

Pet coke boom: what is the outlook on domestic demand, supply, import and prices?

14.00-14.15

Gajraj Singh Rathore, Vice Chairman, SIMA

Double whammy: How will sponge iron survive the Green tirade and recycling push?

Q&A: 14.15-14.30

Tea Break: 14.30-14.45

14.45-16.15

Session 9:

Ground pressure: coal's sustainability: Are we doing enough?

- Why does India lag in implementation of CCS projects?
- How big can India's voluntary carbon market grow?
- Share of washed coal hovers below 5% in India, against 70% in China

Speakers:

14.45-15.00



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Pankaj Kumar Gupta, GM (Energy Transition), NTPC Ltd.

Low emission or high tariff: Balancing trade-off in adoption of supercritical and ultra-supercritical technologies

15.00-15.15

JSP

Coal utilization for gasification: current status, challenges & opportunities

15.15-15.30

Arnab Sinha, Founder & Chief Scientist, Novonanmek Material Sciences

CCUS: Exploring viability of market creation through a cluster-based approach

15.30-15.45

ACB India Ltd.

Coal washing scenario in India: Much ado about something?

15.45-16.00

K C Jain, former GM, CMPDI

Carbon credit: International scenario & its importance for carbon neutral

Q&A: 16.00-16.15

End of Conference