

National Mining Association



2010 Coal Producer Survey • May 2011

# 2010 COAL PRODUCER SURVEY

May 2011

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## The Coal Industry In 2010

Production – Demand for coal and other commodities began to show signs of returning to prior levels as the economic recovery started to take hold in 2010. Weather, often a key influence in coal demand, also played a role in coal's market gains, with a relatively warm summer and a colder than average December. According to Energy Information Administration (EIA) preliminary figures for 2010, total coal production stood at 1,085.3 million short tons, marking a 1 percent, 10 million ton increase from 2009.

Eastern coal (east of the Mississippi River) accounted for 41 percent of production, 446.5 million tons including production from refuse recovery, while production in the West accounted for 59 percent, or 638.8 million tons. Eastern coal production was down slightly (0.7 percent) in 2010, with decreases occurring in most eastern states except Alabama, Louisiana, Maryland and Virginia. Production in the West was up 2.1 percent, with increases primarily in Wyoming, Montana, Texas and Alaska.

Coal-based power generation improved in 2010 despite ongoing recessionary pressures. Coal generation increased 5.4 percent, or 94.8 billion kilowatt hours (kWh), recovering roughly half of the decline experienced in 2009 at the height of the recession. Natural gas use for power also increased in 2010, especially for peaking power demand during the warmer than normal summer. Renewable generation increased its market share in 2010, as mandated renewable standards drove wind and biofuel generation higher. Shipments of U.S. coal exports grew 38 percent, a major bright spot for coal in 2010, and point to a growing trend.

NMA expects coal production to rebound further in 2011, increasing 1.2 percent. Gains in production are expected to coincide with a 1.2 percent decrease in domestic coal consumption that is offset by improving global economic factors driving demand for both metallurgical and stream coals.

Consumption/Inventories – Domestic coal consumption totaled 1,048.3 million tons in 2010, marking an increase of 5 percent (50.8 million tons) over 2009. As previously noted, this was primarily due to the combination of an improving economy and weather factors. Electric power sector coal consumption was up 4.5 percent. Electric power producers used an estimated 975.6 million tons of coal, some 42 million tons more than in 2009.

Demand for coking coal in the U.S. rebounded 38 percent in 2010 to 21.1 million tons – returning to pre-recession levels. Other industrial demand, which includes cement kilns, agricultural processing and heavy industry, along with non-utility generation, increased 7 percent, while the commercial/residential sector was down 4 percent from 2009. Consumer stock inventories ended the year at 182.2 million tons, marking a 7.6 percent stock decrease in 2010 – a correction from high stockpiles caused by the recession. Producer/distributor stockpiles were 42.2 million tons, down 11.7 percent in 2010.

Power Generation – More than 90 percent of U.S. coal production is used to generate electricity. Preliminary EIA data indicate coal-based power generation from all sectors increased 5.4 percent to 1,850.8 billion kWhs in 2010, with coal continuing to provide close to half (45 percent) of total electricity generation.

According to EIA estimates, approximately 32 percent, or 8,102 MW, of new nameplate generating power capacity additions in 2010 were coal-based. That number is expected to decrease to 13 percent (2,534 MW) in 2011.

As in recent years, the greatest percentage of electric power capacity additions in 2010 was natural gas-based, at 37 percent, or 9,488 MW. Wind capacity additions totaled 5,780 MW, a 23 percent share of the total.

The National Energy Technology Laboratory (NETL) reports that the following 11 coal plants (totaling 6,682 MW) became operational in 2010: the 700 MW Rodemacher Unit 3 plant; the 850 MW Comanche plant; the

850 MW Iatan plant; the 820 MW JK Spruce plant; the 615 MW Oak Creek-Unit 1 plant; the 879 MW Oak Grove plant; the 720 MW Plum Point plant; the 300 MW Southwest plant; the 834 MW Trimble plant; the 4 MW Willmar plant and the 110 MW Wygen III plant. A total of 12 coal plants (7,619 MW of capacity) are still under construction and due to come on line by the end of 2012. Recent analysis done by the American Public Power Association (APPA) reveals that an estimated 21 percent of all power plants currently under construction are coal plants, second to natural gas at 41 percent.

Exports – U.S. coal exports rebounded in 2010, increasing 39 percent to 81.7 million short tons – the highest export level since 1997. The 23 million ton gain was primarily attributed to increased global demand for metallurgical coal from Asia, Europe and Canada, as well as demand for steam coal from China and South Korea. The average export price per ton of coal, about \$120, was up 19 percent over 2009. Exports represented 7.5 percent of production in 2010.

Metallurgical coal exports finished the year at 56.1 million tons, up 51 percent, as demand for U.S. coking coal for international markets increased in 2010. Demand from Asia for met coal was up 133 percent to 12.9 million tons, primarily due to increasing demand from China, Japan and South Korea. Met coal exported to Europe was up nearly 50 percent to 29.5 million tons. In the North American market, met coal shipments to Canada were up 43 percent, and shipments to Mexico were up 27 percent. Met coal exported to South America was up 3.2 percent, while coal shipments to Africa increased 19 percent.

Steam coal exports, including lignite and anthracite, increased by 17 percent to 25.6 million tons in 2010, driven in large part by increased shipments to Asia. In addition, the U.S. shipped 85 percent more steam coal to South America and 78 percent more to Africa. Canada was the United States' largest customer, taking nearly 8 million tons, down 2.6 percent from 8.2 million tons in 2009. Europe imported nearly 8.8 million tons, down 16 percent from 10.4 million tons imported from the U.S. in 2009.

Imports - Coal imports decreased 14.5 percent to 19.4 million tons in 2010, with the U.S. receiving less coal from Colombia, Venezuela and Indonesia. As in past years, most imported coal came from South America, with Colombia representing a 75 percent share of total imports. Other major U.S. coal import suppliers in 2010 were Indonesia, Canada and Venezuela. Imported coal is used by East Coast power generators located near port terminals that have capacity to unload ships directly to stockpiles, as well as plants located near port terminals. Coal imports currently only account for roughly 1.8 percent of total U.S. coal supply.

## **Key Coal Supply and Demand Factors in 2010**

Competing Fuels/Energy Sources – EIA estimates that approximately 9,488 MW of new natural gas electric generating capacity came online in 2010, representing 37 percent of total new nameplate generating capacity. The average cost of natural gas delivered to electric generating plants was \$5.08 per MMBtu in 2010, \$4.74 per MMBtu in 2009, \$9.01 per MMBtu in 2008 and \$7.11 per MMBtu in 2007, according to EIA. Natural gas prices continued to remain low in 2010, with gas in storage remaining at relatively high levels despite higher demand. Average annual natural gas spot prices (Henry Hub) increased 12 percent in 2010 to \$4.37 per MMBtu, fluctuating in the range of \$3.50-\$6 per MMBtu over the course of the year.

Natural gas consumption by the electricity sector increased 7.4 percent to 7,378 billion cubic feet in 2010, primarily due to power generators' greater use of natural gas while the fuel price continues to be comparatively low. Preliminary EIA data indicate that net generation from natural gas (a record 981.8 billion kWh) was up 6.6 percent and represented a 23.8 percent share of total net generation, up from 20.2 percent in 2009.

Net generation from nuclear plants increased by 1.0 percent in 2010 to a record 807 billion kWh, with nuclear plants contributing 19.6 percent to total generation. There are 104 nuclear reactor units in operation in the U.S., and many of them are running longer between maintenance outages and have reduced the duration of each scheduled outage. There are 23 applications (37 units) currently on file at the Nuclear Regulatory Commission (NRC) for new reactors. According to the Nuclear Energy Institute, the Tennessee Valley Authority's Watts Bar Unit 2 reactor is expected to begin operation by 2013. Given recent events with Japan's Fukushima nuclear plant, there is greater uncertainty regarding future nuclear capacity growth.

In general, the U.S. nuclear power fleet capacity utilization has remained fairly constant in recent years, currently averaging a 91 percent capacity factor, according to the Nuclear Energy Institute. The Nuclear Regulatory Commission (NRC) also allows nuclear plants to increase their capacity and output through power uprates. According to the NRC, there were 6 plants (250 MWt) that received approval for power uprates in 2010, with another 11 plant applications expected in 2011.

Hydro generation, principally in the Pacific region of the country, accounted for a 6.2 percent share of last year's generation at 257 billion kWh, down 6 percent from 2009.

U.S. wind generation, up 28 percent, represented 1.8 percent of total U.S. generation, but accounted for the largest year-over-year percent increase in electric power generation in 2010.

Weather-related Energy Use – Data from the National Oceanic and Atmospheric Administration (NOAA) indicate the 2010 winter was colder than average nationally, with heating degree-days (a relative measure of outdoor temperatures used as an index of energy use) 1.0 percent above average and 2 to 6 percent cooler in the southern Atlantic and northern mid-western states. Conversely, the summer of 2010 included several heat waves in the Eastern U.S., requiring more electricity for air conditioning.

Transportation – U.S. freight railroads originated 6.7 million carloads of coal in 2010, up 1.2 percent from 2009, according to the Association of American Railroads (AAR). Coal represented 45.4 percent of U.S. rail traffic. The Waterborne Commerce Statistics Center's tonnage indicator report revealed that the 2010 coal and coke tonnage indicator's cumulative average of monthly figures were 160.1, an increase of 12 percent from 2009. Great Lakes shipments were 32 million tons, up 7 percent, based on Lake Carriers' Association preliminary data.

Economic Growth in 2010 – Gross Domestic Product (GDP), as measured in real terms, increased 2.9 percent in 2010, according to the Bureau of Economic Analysis (BEA) preliminary figures. Growth in 2010 was welcomed after an economically challenging 2009, when GDP plunged 2.6 percent. Power generation, in general, and coal consumption from all sectors are positively or negatively impacted when GDP rises or drops.

#### Other Factors Impacting Coal –

- Permit delays and geologic constraints in the East again affected production in 2010. Also in the East, some operators reported compliance with and enforcement of provisions of the MINER Act affected production.
- Increased average coal prices were evident both domestically and in the global market according to EIA preliminary data. Both coal spot and contract prices increased from 2009. Coal prices, still very low compared to other fossil fuels, have been gradually rising over the last decade as long term contracts are being renegotiated and transportation and other costs have increased. U.S. coal price fluctuations are generally tempered by the fact that most coal is sold under forward (year-ahead) contracts rather than on the spot market (unlike natural gas and petroleum). Average delivered coal prices to electric utilities were up 1.4 percent in 2010 to \$45.09 per ton, while coal prices to the industrial sector (excluding coke plants) were down 1.0 percent to \$64.24 per ton. The average prices for coal being delivered to coke plants were up 7.4 percent to \$153.59 per ton. Electric generators paid \$2.26 per MMBtu for coal in 2010, up slightly over 2009. The average price for U.S. export coal was up 18.7 percent to \$120.41 per ton, while the average price for imported coal was up 12.3 percent to \$71.77 per ton. Appalachian coal prices escalated faster than other coals due to strong export demand. This resulted in Appalachian coal being less competitive than natural gas in the generation market.
- The power generating industry's ongoing retrofitting of coal-based plants with scrubbers gives the plants greater coal-type flexibility since they gain the option of switching to lower cost higher sulfur coals. However, some older less efficient plants are expected to be retired. EIA, for example, projects in its reference case forecast that 3 percent of the generating fleet (9 gigawatts) will be retired by 2035. Other industry projections predict a significantly greater number of coal plant retirements, particularly if the multitude of proposed EPA environmental regulations is passed.

## Major Coal Company Asset Acquisitions, Sales and Other Activities

Some of the recent U.S. coal company sales, acquisitions and other industry activities included:

**Alpha Natural Resources, Inc.** - In January 2011, Alpha announced that it would acquire Massey Energy. The transaction is expected to be completed in June, 2011.

**Americas Energy Company** – In April 2010, Tennessee based Americas Energy Co. acquired Evans Coal Corporation.

**Arch Coal, Inc.** – Arch Coal acquired an equity interest in Millennium Bulk Terminals in January 2011. In May 2011, Arch announced that it had signed a definitive agreement with International Coal Group (ICG) to acquire all ICG's outstanding shares. The acquisition is expected to close in the second quarter of 2011.

**Essar Minerals** – Essar, a conglomerate of India's Essar Global, purchased Trinity Coal Co. from Denham Capital in March 2010. Trinity owned and operated 13 coal mines in Kentucky and West Virginia.

**International Resources LLC** – In March 2010, International Resources purchased Clearwater Natural Resources' Miller Bros. coal assets. Clearwater had filed for bankruptcy protection in January 2009.

**James River Coal Co.** – In March 2011, James River announced its intent to purchase International Resource Partners LP, including its subsidiary, Logan & Kanawha Coal LLC. The acquisition is expected to close in the first half of this year.

**Massey Energy Co.** – In April 2010, Massey completed acquisition of Cumberland Resources Corp. and its affiliated companies.

**National Coal Corp.** – In December 2010, National Coal was acquired by Ranger Energy Investments LLC, controlled by James Justice.

**Rhino Resource Partners** – In August 2010, Rhino acquired the assets of bankrupt C.W. Mining.

**Rosebud Mining Co.** – Rosebud purchased certain assets of Evergreen Energy and Buckeye Industrial Mining Co. in April 2010. Also in April, the company acquired Parkwood Resources Inc. In December 2010, Rosebud acquired TJS Mining, Inc. and affiliated companies. In February 2011, it acquired Action Mining, Inc. and associated companies.

**SunCoke Energy** – SunCoke purchased the coal assets of Harold Keene Coal Co. in February 2011.

**Walter Energy, Inc.** – In April 2010, Walter agreed to purchase Chevron Mining's North River mine in Alabama. In April 2011, it acquired Western Coal Corp. (Vancouver).

**Xinergy Ltd.** – In January, 2011, Xinergy's South Fork Coal subsidiary acquired met coal property and reserves in the Little Raleigh & Fire Creek Beds in Greenbrier County. In April 2010, the company purchased the remaining 95 percent interest in Raven Crest Mining, LLC.

## Major Coal Producing Companies, Mines and Mine Complexes in 2010 (Tables 1-4)

Table 1, compiled by the National Mining Association from data collected through a survey of major coal producers, shows 2010 production for 48 coal producing companies in the United States. In 2010, Peabody Energy Corporation was the largest coal producer in the U.S., with output (including tons sold) of 193.6 million tons, representing nearly 18 percent of total U.S. coal production. The second largest was Arch Coal, Inc., with 161.3 million tons (including tons sold), representing nearly 15 percent of total U.S. coal production. Ranking third was Cloud Peak Energy with 95.3 million tons, 8.8 percent of U.S. production. The fourth largest coal producer, Alpha Natural Resources, Inc., had output of 82.2 million tons, 7.6 percent of U.S. production. The fifth largest producer was CONSOL Energy Inc., with 62.4 million tons, 5.8 percent of production. The top five coal producing companies in the survey account for approximately 55 percent of total U.S. production, while the top ten account for nearly 70 percent.

According to the survey, the top five underground mines in terms of production (Table 2) were CONSOL's Bailey Mine in Pennsylvania, with 10.9 million tons; CONSOL's Enlow Fork Mine in Pennsylvania with 10.2 million tons; CONSOL's McElroy Mine in West Virginia with 10.1 million tons; Peabody's Twentymile Mine in Colorado, with 7.1 million tons; and Murray Energy Corporation's Powhatan Number 6 Mine in Ohio, with 6.5 million tons.

The five top producing surface mines (Table 3) in 2010 were the Black Thunder Mine (Arch Coal), with 116.2 million tons; Peabody Energy's North Antelope Mine, with 105.8 million tons; the Cordero Rojo Mine (Cloud Peak Energy), with 38.6 million tons; the Antelope Mine (Cloud Peak Energy), with 35.6 million tons; and the Belle Ayr Mine (Alpha Natural Resources), with 25.8 million tons. All are located in Wyoming's Powder River Basin coal region.

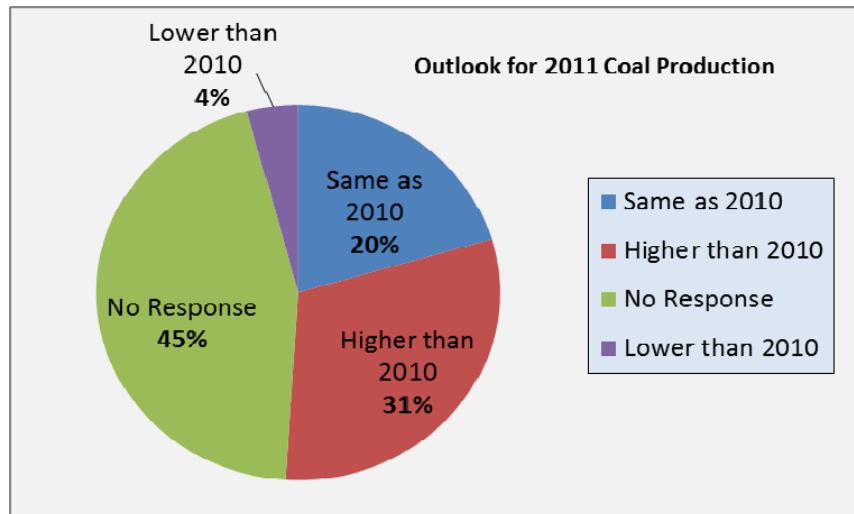
Table 4 shows the 2010 output of major multi-mine production complexes, which are operations or complexes that process coal production from several mines. Peabody Energy's Somerville Complex in Indiana was the largest multi-mine complex with 7.0 million tons; second was Murray Energy's American Coal Company Galatia complex in Illinois, with 6.5 million tons; third was Patriot Coal Company's Corridor G mining operation in West Virginia, with 4 million tons; fourth and fifth were International Coal Group's ICG Hazard operation in Kentucky and TECO Coal Corporation's Premier Elkhorn operation in Kentucky, both with 3.4 million tons.

**Major U.S. Coal Reserve Holders in 2010 (Table 5)**

With about one-third ownership of the nation's coal resources, the U.S. government is the single largest reserve holder with approximately 87 billion tons of estimated recoverable coal reserves. Great Northern Properties Limited Partnership reported the second largest reserve holding with 20 billion tons. Third was Peabody Energy with 9 billion tons, and fourth and fifth were Arch Coal and CONSOL Energy both with 4.4 billion tons. See Table 5 for the rankings of the top holders of U.S. coal reserves.

**General Outlook for 2011 U.S. Coal Production**

Coal companies were asked for their views on the outlook for 2011 U.S. coal production. Greater optimism is reflected in the outlook for 2011 than last year, with 31 percent of the survey respondents expecting a stronger production year, 20 percent expecting 2011 production to be at the same level as last year, 4 percent expect lower production, and 45 percent not responding to this part of the survey. The National Mining Association expects total U.S. coal production to reach 1,098 billion tons in 2011, up 1.2 percent, with production from Eastern coal fields up 1.1 percent and western production up 1.5 percent.



## Workforce Age Survey

NMA surveyed companies on the average age of each company's mine workforce in 2010. Of the 27 companies responding, 44 percent estimated the average age of their workforce to be in the 46–50 age range, 41 percent estimated it to be in the 41–45 year old range, and 15 percent in the 36–40 age range. The industry is experiencing a gradual rise in younger mine workers as some older workers retire. High wages and good benefits continue to entice a new generation of miners to enter the workforce. The nation's current unemployment situation reinforces the value of stable high paying mining jobs.

## Survey Methodology

Coal producers and reserve holders were asked to provide their company's total U.S. coal production and reserve holdings for 2010. They also were asked to name their mines and the production output of each mine using the following criteria: surface mines with production of 2 million tons or greater; underground mines with production of 1 million tons or greater; and any multi-mine production complex with output of more than 1 million tons. A multi-mine production complex is defined as an operation that is not a single mine, but one that processes production from more than one mine. Every effort was made to include as many coal producers and reserve holders as possible.

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Notes: The production figures reported in this survey are intended to reflect ownership of mine production as of the end of calendar year 2010. Companies not included in the list are encouraged to submit data for next year. The National Mining Association has conducted a survey of major coal producers since the 1980's. The results of prior surveys can be found in earlier editions of NMA's *Coal Producer Survey*, and prior to 1998, in NMA *Facts About Coal*, and *Facts About Coal & Minerals*, and Mining Media Publishing's *Keystone Coal Industry Manual*. The latest edition of NMA's *Coal Producer Survey* report is available in PDF format on the NMA web site: <http://www.nma.org>. NMA greatly appreciates the many contributors to this important annual survey.

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**TABLE 1**  
**Major U.S. Coal Producers - 2010**  
**(Million Short Tons)**

Company	Production Tonnage	Percent of Total U.S.
1. Peabody Energy Corporation <sup>1</sup>	193.6	17.9%
2. Arch Coal, Inc. <sup>2</sup>	161.3	14.9%
3. Cloud Peak Energy, Inc. <sup>3</sup>	95.3	8.8%
4. Alpha Natural Resources, LLC	82.2	7.6%
5. CONSOL Energy Inc.	62.4	5.8%
6. Massey Energy Company (includes Cumberland Resources) <sup>4</sup>	36.7	3.4%
7. North American Coal Corporation	34.1	3.1%
8. Kiewit Mining Group, Inc. <sup>5</sup>	33.5	3.1%
9. Alliance Resource Partners	28.9	2.7%
10. Patriot Coal Corporation	28.7	2.6%
11. Luminant (Energy Future Holdings)	27.6	2.5%
12. Westmoreland Coal Company	25.1	2.3%
13. Murray Energy Corporation	24.7	2.3%
14. International Coal Group (ICG)	15.5	1.4%
15. BHP Billiton	12.8	1.2%
16. Interwest Mining Company (PacifiCorp)	9.4	0.9%
17. James River Coal Company	8.8	0.8%
18. TECO Coal Corporation	8.7	0.8%
19. Chevron Mining Inc.	7.8	0.7%
20. Oxford Resource Partners LP <sup>6</sup>	7.5	0.7%
21. Rosebud Mining Company	7.3	0.7%
22. Foresight Energy, LLC (Cline Group)	7.2	0.7%
23. Jim Walter Resources, Inc.	6.7	0.6%
24. Booth Energy Group <sup>6</sup>	6.1	0.6%
25. Knight Hawk Coal, LLC <sup>6</sup>	6.0	0.6%
26. Essar/Frasure Creek Mining Co. <sup>6</sup> (formerly Trinity)	5.9	0.5%
27. Black Hills Corporation (Wyodak Resources)	5.9	0.5%
28. Western Fuels Association, Inc.	5.7	0.5%
29. Armstrong Energy Corp. <sup>6</sup>	5.6	0.5%
30. Cliffs Natural Resources Inc. <sup>6</sup>	4.2	0.4%
31. Rhino Energy LLC	4.0	0.4%
32. Dolet Hills Lignite Company (AEP)	3.9	0.4%
33. BNI Coal, LTD	3.8	0.4%
34. Oxbow Carbon & Minerals Inc. <sup>6</sup>	3.8	0.4%
35. Vectren Fuels, Inc. (Five Star)	3.8	0.4%
36. Metinvest BV (includes former United Coal Co.) <sup>6</sup>	3.7	0.3%
37. Ranger Energy/Justice (excludes National Coal) <sup>6</sup>	3.6	0.3%
38. Mechel Oao <sup>6</sup>	3.3	0.3%
39. Rio Tinto Energy America	2.6	0.2%
40. Solar Sources, Inc.	2.6	0.2%
41. Trapper Mining Inc.	2.2	0.2%
42. Drummond Company, Inc.	2.1	0.2%
43. Usibelli Coal Mine, Inc.	2.0	0.2%
44. Vigo Coal Company, Inc.	1.8	0.2%
45. ArcelorMittal <sup>6</sup>	1.4	0.1%
46. Springfield Coal Co. (includes former Freeman Energy) <sup>6</sup>	1.3	0.1%
47. Xinergy Corp./Nix <sup>6</sup>	1.2	0.1%
48. National Coal Corporation (now Ranger Energy) <sup>6</sup>	1.0	0.1%
Other Producers	70.5	6.5%
<b>Total U.S. Production <sup>7</sup></b>	<b>1,083.8</b>	<b>100.0%</b>

Notes: Figures are rounded. 2010 data compiled from 2011 NMA survey of major producers. May not be all-inclusive. Any companies not included in this listing are invited to submit data for the next edition. U.S. production total for 2010 is an EIA preliminary estimate.

<sup>1</sup> Peabody Energy Corp. production figure includes production plus tons sold, excluding trading and brokerage operations.

<sup>2</sup> Arch Coal, Inc. production figure includes tons sold. Excludes purchased tons.

<sup>3</sup> Cloud Peak production figure includes 50 percent interest in Decker Mine.

<sup>4</sup> Massey production figure includes production and excludes purchased tons.

<sup>5</sup> Kiewit production figure includes 50 percent interest in Decker Mine.

<sup>6</sup> Department of Labor, Mine Safety & Health Administration 2010 preliminary data.

<sup>7</sup> Department of Energy, Energy Information Administration 2010 preliminary data.

**TABLE 2**

**Major U.S. Underground Coal Mines - 2010  
(Million Short Tons)**

<b>Mine Name</b>	<b>Location</b>	<b>Tonnage</b>	<b>Operating Company</b>
1. Bailey	Pennsylvania	10.9	CONSOL Energy Inc.
2. Enlow Fork	Pennsylvania	10.2	CONSOL Energy Inc.
3. McElroy	West Virginia	10.1	CONSOL Energy Inc.
4. Twentymile	Colorado	7.1	Peabody Energy Subsidiary
5. Powhatan No. 6	Ohio	6.5	The Ohio Valley Coal Co. (Murray)
6. SUFCO	Utah	6.2	Arch Coal, Inc.
7. Century	Ohio	6.2	American Energy Corp. (Murray)
8. Loveridge	West Virginia	5.9	CONSOL Energy Inc.
9. Cumberland	Pennsylvania	5.8	Cumberland Coal Resources (Alpha)
10. Warrior	Kentucky	5.8	Warrior Coal, LLC (Alliance)
11. River View	Kentucky	5.8	River View Coal, LLC (Alliance)
12. Mach No. 1	Illinois	5.8	Williamson Energy, LLC (Foresight Energy)
13. Robinson Run	West Virginia	5.5	CONSOL Energy Inc.
14. San Juan	New Mexico	5.0	BHP Billiton-New Mexico Coal
15. Emerald	Pennsylvania	4.9	Emerald Coal Resources (Alpha)
16. West Elk	Colorado	4.8	Arch Coal, Inc.
17. Buchanan	Virginia	4.7	CONSOL Energy Inc.
18. Blacksville No. 2	West Virginia	4.5	CONSOL Energy Inc.
19. Mountaineer II / Mtn. Laurel	West Virginia	4.4	Arch Coal, Inc.
20. New Era	Illinois	4.3	American Energy Corp. (Murray)
21. Bridger	Wyoming	4.0	Bridger Coal Company (Interwest)
22. Dotiki	Kentucky	3.9	Webster County Coal LLC (Alliance)
23. Shoemaker	West Virginia	3.9	CONSOL Energy Inc.
24. Blue Creek No. 7	Alabama	3.9	Jim Walter Resources, Inc.
25. Elk Creek <sup>1/</sup>	Colorado	3.8	Oxbow Mining, LLC
26. Federal	West Virginia	3.7	Eastern Associated Coal Co., LLC (Patriot)
27. Highland	Kentucky	3.5	Highland Mining Co., LLC (Patriot)
28. West Ridge	Utah	3.4	West Ridge Resources, Inc. (Murray)
29. Elk Creek	Kentucky	3.3	Hopkins County Coal, LLC (Alliance)
30. Gibson	Indiana	3.1	Gibson County Coal, LLC (Alliance)
31. Gateway	Illinois	3.0	Peabody Energy Subsidiary
32. North River	Alabama	3.0	Chevron Mining Inc.
33. Skyline	Utah	3.0	Arch Coal, Inc.
34. Deer Creek	Utah	2.9	Energy West Mining Co. (Interwest)
35. Willow Lake	Illinois	2.9	Peabody Energy Subsidiary
36. Blue Creek No. 4	Alabama	2.8	Jim Walter Resources, Inc.
37. Prosperity	Indiana	2.7	Five Star Mining, Inc. (Vectren)
38. Francisco	Indiana	2.7	Peabody Energy Subsidiary
39. Mettiki	West Virginia	2.6	Mettiki Coal LLC (Alliance)
40. Viper	Illinois	2.5	ICG Illinois, LLC
41. Dugout Canyon	Utah	2.2	Arch Coal, Inc.
42. New Future	Illinois	2.2	American Energy Corp. (Murray)
43. Panther	West Virginia	2.0	Panther LLC (Patriot)
44. Big Mountain	West Virginia	2.0	Pine Ridge Coal Co., LLC (Patriot)
45. Shoal Creek	Alabama	1.9	Drummond Company Inc.
46. Matrix Energy No. 1 <sup>1/</sup>	Kentucky	1.7	Matrix Energy LLC (Booth)
47. Pattiki	Illinois	1.7	White County Coal LLC (Alliance)
48. Deep Mine No. 26	Virginia	1.6	Paramont Coal Company, LLC (Alpha)
49. Prairie Eagle <sup>1/</sup>	Illinois	1.6	Knight Hawk Coal, LLC
50. Parkway <sup>1/</sup>	Kentucky	1.5	Armstrong Energy Corp.
51. Hopedale	Ohio	1.4	Hopedale Mining LLC (Rhino)
52. MC Mining	Kentucky	1.3	MC Mining, LLC (Alliance)
53. Crown III <sup>1/</sup>	Illinois	1.3	Springfield Coal Co.
54. Sentinel	West Virginia	1.3	Sentinel Division (ICG)
55. Elkhorn 4-2	Kentucky	1.2	Perry County Coal Corp. (TECO)
56. Logansport	Pennsylvania	1.1	Rosebud Mining Co.
57. Air Quality No. 1	Indiana	1.1	Peabody Energy Subsidiary
58. Pinnacle	West Virginia	1.1	Pinnacle Mining Co. (Cliffs NR)
59. Poplar Ridge	West Virginia	1.0	Brooks Run Mining (Alpha)
60. Shay No. 1	Illinois	1.0	Macoupin Energy, LLC (Foresight Energy)
61. Paradise	Kentucky	1.0	KenAmerican Resources, Inc. (Murray)
62. Emery	Utah	1.0	CONSOL Energy Inc.
63. Oaktown Fuels	Indiana	1.0	Black Panther Mining, LLC (Vectren)

Notes: Figures are rounded. 2010 data compiled from 2011 NMA survey of major producers.

May not be all-inclusive. Any companies not included in this listing are invited to submit data for the next edition.

<sup>1/</sup> Department of Labor, Mine Safety & Health Administration, 2010 preliminary data.

TABLE 3

**Major U.S. Surface Coal Mines - 2010  
(Million Short Tons)**

<b>Mine Name</b>	<b>Location</b>	<b>Tonnage</b>	<b>Operating Company</b>
1. Black Thunder	Wyoming	116.2	Arch Coal, Inc.
2. North Antelope	Wyoming	105.8	Peabody Energy Subsidiary
3. Cordero Rojo	Wyoming	38.6	Cloud Peak Energy
4. Antelope	Wyoming	35.9	Cloud Peak Energy
5. Belle Ayr	Wyoming	25.8	Alpha Coal West
6. Buckskin	Wyoming	25.5	Buckskin Mining Co. (Kiewit)
7. Caballo	Wyoming	23.5	Peabody Energy Subsidiary
8. Eagle Butte	Wyoming	23.2	Alpha Coal West
9. Spring Creek	Montana	19.3	Cloud Peak Energy
10. Freedom	North Dakota	14.6	Coteau Properties Co. (North American)
11. Rosebud	Montana	12.3	Western Energy Co. (Westmoreland)
12. Coal Creek	Wyoming	11.4	Arch Coal, Inc.
13. Rawhide	Wyoming	11.3	Peabody Energy Subsidiary
14. Martin Lake	Texas	10.8	Luminant Mining
15. Navajo	New Mexico	7.8	BHP Billiton-New Mexico Coal
16. Kayenta	Arizona	7.8	Peabody Energy Subsidiary
17. Falkirk	North Dakota	7.6	The Falkirk Mining Co. (North American)
18. El Segundo	New Mexico	6.6	Peabody Energy Subsidiary
19. Kosse	Texas	6.2	Luminant Mining
20. Wyodak	Wyoming	5.9	Wyodak Resources Dev. Corp. (Black Hills)
21. Absaloka	Montana	5.5	Westmoreland Resources Inc.
22. Dry Fork	Wyoming	5.4	Western Fuels-Wyoming
23. Three Oaks	Texas	5.4	Luminant Mining
24. Kemmerer	Wyoming	4.8	Chevron Mining Inc.
25. Sabine	Texas	4.6	Sabine Mining (North American)
26. Jewett	Texas	4.2	Texas Westmoreland Coal Co.
27. Red Hills	Mississippi	4.0	Mississippi Lignite (North American)
28. Center	North Dakota	3.8	BNI Coal, Ltd.
29. Dolet Hills Lignite	Louisiana	3.5	Dolet Hills Lignite Co. (AEP)
30. Somerville Central	Indiana	3.3	Peabody Energy Subsidiary
31. San Miguel	Texas	3.3	San Miguel Lignite (North American)
32. Black Butte	Wyoming	3.2	Black Butte Coal Co. (Kiewit)
33. Viking	Indiana	3.2	Peabody Energy Subsidiary
34. Twilight	West Virginia	3.0	Progress Coal Co. (Massey)
35. Black Castle	West Virginia	3.0	Black Castle Mining Co. (Massey)
36. Decker	Montana	2.9	Decker Coal Co. (Kiewit/Cloud Peak)
37. Beulah	North Dakota	2.9	Dakota Westmoreland Corp.
38. Coal-Mac	West Virginia	2.9	Arch Coal, Inc.
39. Bear Run	Indiana	2.8	Peabody Energy Subsidiary
40. Logan County	West Virginia	2.7	Patriot Coal Corp.
41. Big Brown	Texas	2.6	Luminant Mining
42. Monticello	Texas	2.6	Luminant Mining
43. Colowyo	Colorado	2.6	Rio Tinto Energy America
44. Republic	West Virginia	2.5	Republic Energy Co. (Massey)
45. Bridger	Wyoming	2.4	Bridger Coal Co. (Interwest)
46. Frasure Creek No. 6 <sup>1/</sup>	Kentucky	2.2	Frasure Creek Mining, LLC (Essar)
47. Trapper	Colorado	2.2	Trapper Mining Inc.
48. Cottage Grove	Indiana	2.1	Peabody Energy Subsidiary
49. Somerville North	Indiana	2.0	Peabody Energy Subsidiary
50. Usibelli	Alaska	2.0	Usibelli Coal Mine, Inc.
51. Wildcat	West Virginia	2.0	Nicholas Energy (Massey)

Notes: Figures are rounded. 2010 data compiled from a 2011 NMA survey of major producers.

May not be all-inclusive. Any companies not included in this listing are invited to submit data for the next edition.

1/ Department of Labor, Mine Safety & Health Administration, 2010 preliminary data.

**TABLE 4**  
**Major Multi-Mine Production Complexes - 2010**  
**(Million Short Tons)**

Complex Name	Location	Tonnage	Company
1. Somerville Complex	Indiana	7.0	Peabody Energy Subsidiary
2. American Coal (Galatia Complex)	Illinois	6.5	The American Coal Company (Murray)
3. Corridor G	West Virginia	4.0	Patriot Coal Corp.
4. ICG Hazard	Kentucky	3.4	ICG Hazard, LLC
5. Premier Elkhorn	Kentucky	3.4	Premier Elkhorn Coal Co. (TECO)
6. Black Mountain	Kentucky	3.4	Massey Energy Co.
7. Coal-Mac	West Virginia	3.2	Arch Coal, Inc.
8. Republic Energy	West Virginia	3.1	Massey Energy Co.
9. Perry County	Kentucky	3.1	Perry County Coal Corp. (TECO)
10. Wells	West Virginia	3.1	Patriot Coal Corp.
11. Progress Coal Company	West Virginia	3.0	Massey Energy Co.
12. Sidney Coal Company	Kentucky	3.0	Massey Energy Co.
13. Miller Creek	West Virginia	3.0	CONSOL of Kentucky
14. Black Castle	Kentucky	3.0	Massey Energy Co.
15. Triad	Indiana	2.8	Triad Mining, Inc. (James River)
16. Marfork	West Virginia	2.8	Massey Energy Co.
17. Wildcat Hills	Illinois	2.8	Peabody Energy Subsidiary
18. Illinois	Illinois	2.5	ICG Illinois, LLC
19. Blue Grass	Kentucky	2.3	Patriot Coal Corp.
20. Clintwood	Kentucky & Virginia	2.3	Clintwood Elkhorn Mining (TECO)
21. Nicholas Energy	West Virginia	2.2	Massey Energy Co.
22. Lone Mountain	Kentucky	2.1	Arch Coal, Inc.
23. Elk Run Coal Company	West Virginia	2.1	Massey Energy Co.
24. Cumberland	Virginia	2.1	Massey Energy Co.
25. Fola Complex	West Virginia	2.0	Fola Coal Co. (CONSOL)
26. Big Mountain	West Virginia	2.0	Patriot Coal Corp.
27. CAM Mining	Kentucky	1.9	CAM Mining, LLC (Rhino)
28. Mammoth	West Virginia	1.8	Massey Energy Co.
29. McCoy	Kentucky	1.8	McCoy Elkhorn Coal Corp. (James River)
30. Eastern	West Virginia	1.7	ICG Eastern, LLC
31. Muhlenbuerg	Kentucky	1.6	Oxford Mining Co.- Kentucky, LLC
32. Kanawha Eagle	West Virginia	1.5	Patriot Coal Corp.
33. Cumberland River	Virginia	1.5	Arch Coal, Inc.
34. Blue Diamond	Kentucky	1.4	Blue Diamond Coal Co. (James River)
35. Hopedale Mining	Ohio	1.4	Hopedale Mining, LLC (Rhino)
36. Cadiz	Ohio	1.4	Oxford Mining Co., LLC
37. Bledsoe	Kentucky	1.3	Bledsoe Coal Corporation (James River)
38. Sentinel	West Virginia	1.3	Sentinel Division (ICG)
39. Edwight	West Virginia	1.2	Massey Energy Co.
40. Leeco	Kentucky	1.2	Leeco, Inc. (James River)
41. Martin County	Kentucky	1.2	Massey Energy Co.
42. Paint Creek	West Virginia	1.1	Patriot Coal Corp.
43. Independence Coal Company	West Virginia	1.1	Massey Energy Co.
44. Belmont County	Ohio	1.1	Oxford Mining Co., LLC
45. Wolf Run Mining	West Virginia	1.1	Wolf Run Mining Co. (ICG)
46. Harrison	Ohio	1.0	Oxford Mining Co., LLC
47. Jones Fork Complex	Kentucky	0.0	CONSOL of Kentucky

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May not be all-inclusive. Any companies not included in this listing are invited to submit data for the next edition.  
A multimine complex is a mine operation that processes production from more than one mine.

**TABLE 5**  
**Major Holders of U.S. Coal Reserves - 2010**  
**(Billion Short Tons)**

Holder	Estimated Reserves
1. U.S. Government	87.000 *
2. Great Northern Properties Limited Partnership	20.000
3. Peabody Energy Corporation	9.000
4. Arch Coal, Inc.	4.400
5. CONSOL Energy Inc.	4.400
6. Foresight Energy, LLC (Cline Group)	2.964
7. Massey Energy Company (includes Cumberland Resources)	2.800
8. The North American Coal Corporation	2.300
9. Natural Resource Partners LP	2.300
10. Alpha Natural Resources, LLC	2.250
11. Patriot Coal Corporation	1.865
12. Pocahontas Land Corporation (Norfolk Southern)	1.700
13. International Coal Group (ICG)	1.100
14. Kentucky River Properties LLC	0.981
15. Cloud Peak Energy, Inc.	0.970
16. Murray Energy Corporation	0.832
17. Penn Virginia Resource Partners, LP	0.803
18. Luminant Mining (Energy Future Holdings)	0.800
19. Usibelli Coal Mine, Inc.	0.700
20. Alliance Resource Partners	0.697
21. BNI Coal, LTD	0.596
22. Rosebud Mining Company	0.544
23. Kiewit Mining Group, Inc.	0.525
24. Westmoreland Coal Company	0.390
25. Western Fuels Association, Inc.	0.340
26. Rhino Energy LLC	0.330
27. Black Hills Corporation (Wyodak Resources)	0.290
28. Dolet Hills Lignite Company (AEP)	0.285
29. James River Coal Company	0.271
30. TECO Coal Corporation	0.270
31. BHP Billiton	0.241
32. Chevron Mining Inc.	0.189
33. Metinvest BV (includes former United Coal Co.)	0.175
34. Interwest Mining Company (PacifiCorp)	0.174
35. Vectren Fuels, Inc. (Five Star)	0.137
36. Jim Walter Resources, Inc.	0.132
37. Western Pocahontas Properties	0.122
38. Jewell Smokeless Coal Corp. (Sunoco)	0.100
39. Oxford Resource Partners, LP	0.094
40. Drummond Company, Inc.	0.076
41. National Coal Corporation (now Ranger Energy)	0.040
42. Solar Sources, Inc.	0.036
43. Trapper Mining Inc.	0.023
44. Rio Tinto Energy America <sup>1/</sup>	0.017
45. Vigo Coal Company, Inc.	0.008
46. ArcelorMittal	N/A
47. Armstrong Energy Corp.	N/A
48. Booth Energy Group	N/A
49. Cliffs Natural Resources Inc.	N/A
50. Essar/Frasure Creek Mining Co. (formerly Trinity)	N/A
51. Knight Hawk Coal, LLC	N/A
52. Mechel Oao	N/A
53. Oxbow Carbon & Minerals Inc.	N/A
54. Ranger Energy/Justice (excluding National Coal)	N/A
55. Springfield Coal Co. (includes former Freeman Energy)	N/A
56. Xinergy Corp./Nix	N/A

Notes: 2010 data compiled from 2011 NMA survey of major producers. May not be all-inclusive.

Any companies not included in this listing are invited to submit data for the next edition.

\* U.S. Government total is an NMA calculation based on federal ownership of about one-third of the United States' coal resources (Bureau of Land Management, 1993) and estimated recoverable reserves of 261 billion short tons (Energy Information Administration, 2009).

<sup>1/</sup> Leased and reported resources in LMU were 2.9 billion st; reported reserves 17 million short tons. Revised 5/31/11

N/A = Not Available.