

JOHANNESBURG OFFICE

BALLYOAKS OFFICE PARK, BUILDING B, 35 BALLYCLARE DRIVE, BRYANSTON EXT 7
P O BOX 3044, RANDBURG, 2125
TEL: +27 11 513 -1450 FAX: +27 11 463-2771

PORT ELIZABETH OFFICE

57 FIFE AVENUE, ROWALLAN PARK, PORT ELIZABETH, 6025
P O BOX 505, HUNTERS RETREAT, 6017
TEL: +27 41 371-5298 FAX: +27 41 371-5151

WEBSITE: WWW.WHOOWNSWHOM.CO.ZA
REG No: 1986/003014/07



Essential Business Information

RESEARCH REPORT

on

Mining of Coal and Lignite

SICCODE: 21000

Report Date: May 2010

Compiled By:
Hilary Klopper
research@whoownswhom.co.za

Report Index

INTRODUCTION	4
DESCRIPTION OF THE INDUSTRY	4
➤ Types of coal	4
➤ Reserves	5
➤ Consumption	5
➤ Production	5
➤ Exports	6
➤ Richards Bay Coal Terminal	6
SIZE OF THE INDUSTRY	6
STATE OF THE INDUSTRY	9
➤ Local	9
RBCT	11
Corporate Actions	12
Regulations	12
Black Economic Empowerment	14
➤ Regional	15
➤ International	15
INFLUENCING FACTORS	16
➤ Economic Environment	16
➤ Rising input costs	16
➤ Regulations	17
➤ Logistics Constraints	17
➤ Labour Resources	17
➤ HIV/Aids and Tuberculosis	17
➤ Mine Safety	17
➤ Strike Action	18
➤ Migrant Labour	18
➤ Cyclicity	18
➤ Environmental Concerns	18
COMPETITION	19
➤ Industry Supply Chain	19
➤ Research and Development	19
➤ Innovation	20
SWOT ANALYSIS	20
➤ Strengths	20
➤ Weaknesses	21
➤ Opportunities	21
➤ Threats	21
FUTURE OUTLOOK	21
INDUSTRY ASSOCIATIONS	22
REFERENCES	23
➤ Publications	23
➤ Websites	23
APPENDIX 1	24
➤ Major Coal Projects In South Africa	24
APPENDIX 2	26
➤ Bilateral Investment Treaties (BIT Arbitration)	26
ORGANOGRAM	27

Companies Profiled

Anglo Coal (Div Of Anglo Operations Ltd)	29
Anker Coal And Mineral Holdings South Africa (Pty) Ltd	31
Arm Coal (Pty) Ltd	33
Bhp Billiton Energy Coal South Africa Ltd.....	35
Coal Of Africa Ltd	37
Exxaro Coal (Pty) Ltd	39
Kangra Coal (Pty) Ltd.....	41
Kuyasa Mining (Pty) Ltd	42
Optimum Coal Holdings Ltd.....	43
Petmin Ltd.....	45
Sasol Mining (Pty) Ltd.....	47
Xstrata Coal (Div Of Xstrata South Africa (Pty) Ltd.....	49