Outlook and Opportunities for U.S. Coal Exports

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July 21, 2026

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U.S. coal is abundant, high-quality and increasingly critical to global energy security and steel production — but it remains under-represented in global markets.

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The big picture

93 mst
U.S. coal exports in 2025

$10B
Estimated 2025 export revenue

62%
Exports handled by East Coast ports

36K+
Jobs supported by coal exports

Primary Constraints

I. Market access

II. Logistics

III. Cost structure

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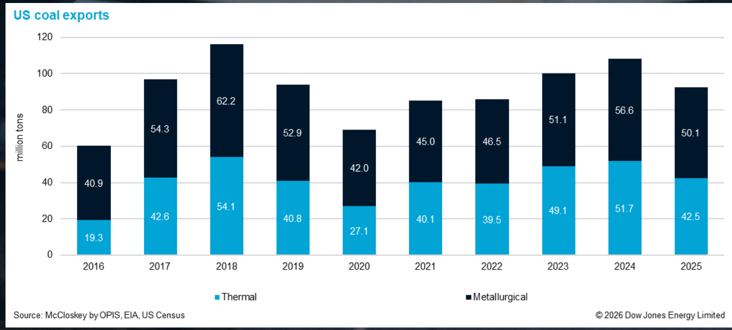
Why now: Global demand is creating an opening



Room to grow: Three demand signals

- Global electricity demand is rising, with data centers, electrification and industrial growth adding pressure.
- More than 1,200 coal generating units are under development globally, primarily in Asia.
- Metallurgical coal demand is expected to remain strong as steel production grows in India and Southeast Asia.

Coal exports function as an "energy hedge" for allies and trade partners while supporting U.S. jobs and balance of trade.

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The core problem: The U.S. is under-positioned where demand is growing

Shipping Distances and Times

Origin Country/Port	Destination Country/Port (Nautical Miles / Days): Japan/ Tokyo	S. Korea/ Inchon	China/ Guangzhou	India/ Mumbai
Australia/Newcastle	4,284/14.9	4,752/16.5	4,552/15.7	6,072/21.1
Canada/Westshore	4,272/14.8	5,027/17.5	5,839/20.5	9,513/33.0
Colombia/Barranquilla (via CGH)	14,449/50.2	14,103/14.9	13,086/45.5	10,685/37.1
Colombia/Barranquilla (via PC)	8,076/28.0	8,865/30.8	9,656/33.5	13,307/46.2
Indonesia/Balikpapan	2,657/9.2	2,493/8.7	1,736/6.0	3,463/12.0
Mexico/Guaymas	5,935/20.6	6,722/23.3	7,520/26.1	11,152/38.7
South Africa/Richards Bay	7,679/26.7	5,630/19.5	6,446/22.9	8,309/35.1
US/Long Beach (via CGH)	15,637/54.3	15,291/53.1	14,274/49.6	11,873/41.2
US/New Orleans (via PC)	9,141/31.8	9,930/34.5	10,721/37.2	14,372/49.9
US/San Francisco-Oakland	4,559/15.8	5,322/18.5	6,127/21.3	9,791/34.0

PC = Panama Canal
CGH = Cape of Good Hope
Days Calculated at Average Speed of 12 knots

Market access is the decisive constraint

Distance + infrastructure = cost disadvantage

- Asian markets are the largest growth opportunity, but the U.S. is farther away than Australia, Indonesia and Russia.
- U.S. western coal, especially PRB and Uinta Basin coal, lacks efficient, large-scale U.S.-controlled trans-Pacific access.
- Without new West Coast capacity, western producers rely on constrained Canadian outlets or less efficient alternatives.

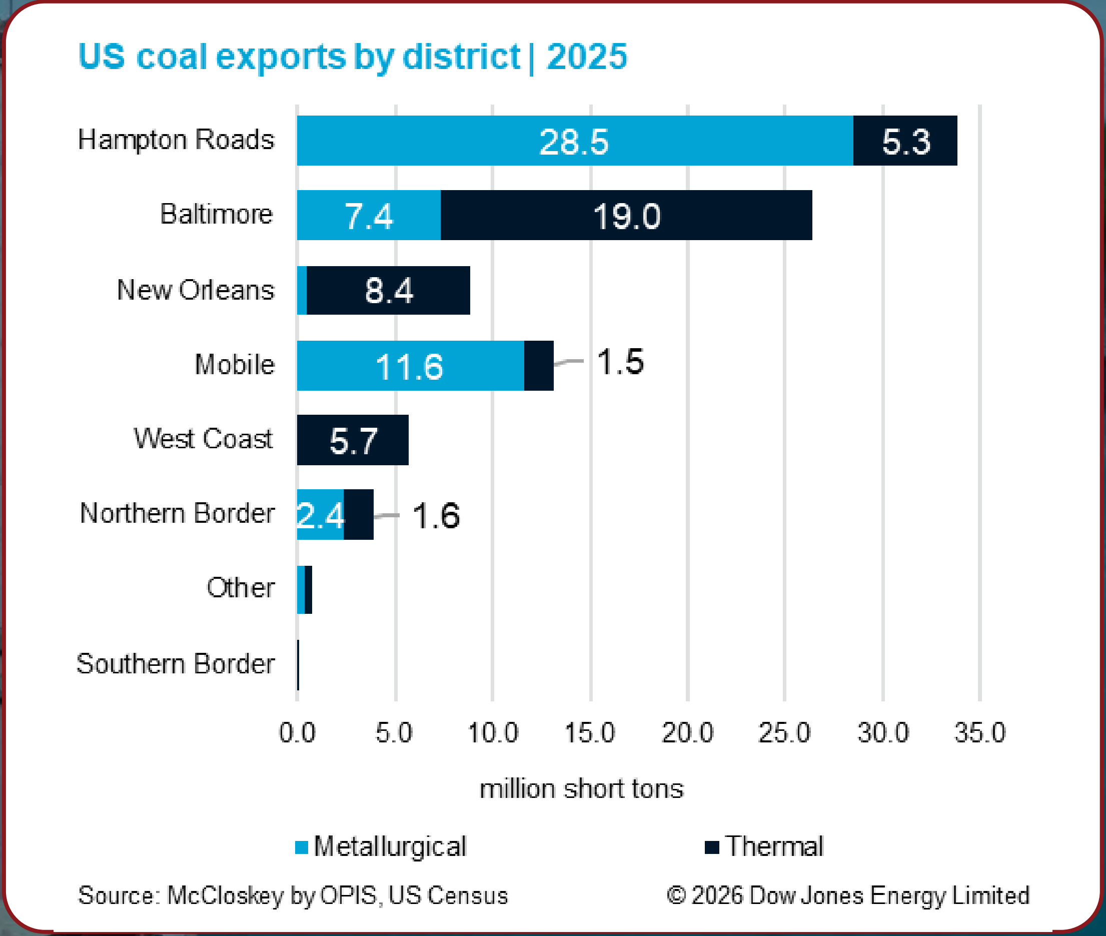
Export logistics are concentrated and fragile

Concentration creates vulnerability

Hampton Roads and Baltimore are the dominant East Coast arteries; Gulf ports support Illinois Basin and Southern Appalachia.

Resilience requires redundancy

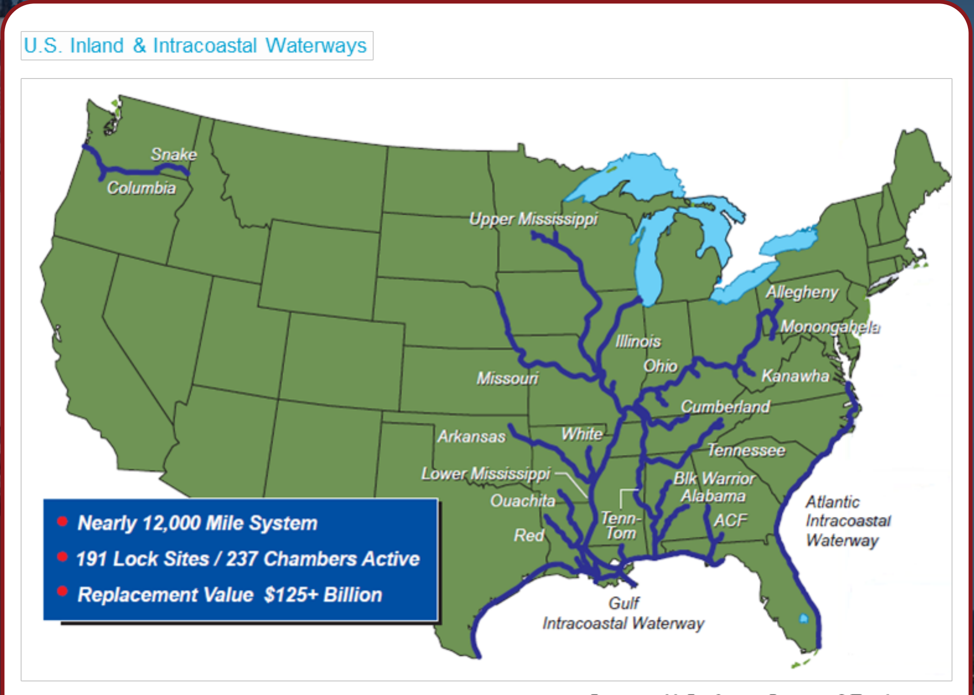
The Baltimore bridge collapse and Black Warrior River lock outages show why alternate routes and modernized assets matter.



Recommendation 1: Develop and modernize export infrastructure

Priority actions

- Prioritize increasing West Coast coal port capacity capable of serving large oceangoing vessels.
- Support Western Gateway/Oakland while exploring additional West Coast, Pacific Northwest and Mexico options such as Guaymas.
- Expand East Coast and Gulf capacity, deepen channels, modernize locks and dams, and coordinate DOT, USACE and states.



Source: U.S. Army Corps of Engineers

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Recommendation 2: Reduce excess costs and regulatory friction

1

Taxes & fees

Review and reduce coal supply chain costs that weaken global competitiveness.

2

Federal leasing

Update fair market value, bonus-bid timing and royalty policies.

3

Permitting

Streamline federal/state review without lowering safety or environmental standards.

4

Transportation

Encourage rail collaboration, and reform rules that inhibit efficient operations.

Key lens: remove friction costs that do not improve safety, environmental performance or market reliability.

Recommendation 3: Improve trade terms and market access

Trade policy should be used to make U.S. coal easier to buy—not more expensive to ship.

Eliminate barriers
Target tariffs and non-tariff barriers in China, India and other growth markets.

Use trade agreements
Include coal import targets in reciprocal trade agreements and enforce market-opening commitments.

Address Russia
Include coal in sanctions frameworks for Russian energy products.

Fix shipping fees
Make the suspension of 301 shipping fees permanent for coal and mined exports until alternatives exist.

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Recommendation 4: Enhance technology and productivity

Technology is a competitiveness tool

- Adopt international standards to accelerate deployment of mining and OEM technologies.
- Consider tax credits or grants for operators that trial technologies improving productivity and safety.
- Extend U.S. leadership in high-efficiency boilers, advanced mining equipment and rare earth extraction from coal byproducts.

Pair innovation with analytics: establish a coordinated function across EIA, NETL, ITA, USGS, DOT and USACE to evaluate coal export competitiveness.

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