National Mining Association

2002 Coal Producer Survey

May 2003

NMA
THE AMERICAN RESOURCE

2002
COAL PRODUCER SURVEY

May 2003

Compiled by:
Leslie L. Coleman
(202) 463-9780
E-mail: lcoleman@nma.org

NATIONAL MINING ASSOCIATION
101 Constitution Avenue, NW
Suite 500 East
Washington, D.C. 20001
(202) 463-2600
www.nma.org

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The Coal Industry In 2002

The year 2002 was a mixed one for the coal industry in many ways. Coal production decreased slightly to 1,093.8 million short tons, down 33.9 million tons, or 3.0 percent from 2001 levels, according to the Energy Information Administration's (EIA) preliminary production estimate. Importantly, it was the ninth consecutive year coal production has exceeded one billion tons. Despite lower production levels, preliminary data indicate that coal consumption of 1,065 million tons was 0.5 percent ahead of last year, and electricity generation from coal was up 1.1 percent. With 90 percent of coal production going to electricity generation, coal demand in the electric-power sector continues to drive the rise in coal use.

Last year, eastern coal accounted for about 45 percent (492.4 million tons) of production, and Western production was about 55 percent (601.4 million tons). While production increases came primarily from mines in Wyoming and Colorado in the West, decreases were seen in many states in the East especially in West Virginia, Pennsylvania, Kentucky, Virginia and Indiana.

Preliminary EIA surveys of the electric-power sector indicate that 2002 electric power generators used an estimated 975.4 million tons of coal, nearly 11 million tons more than in 2001 (see EIA *Monthly Energy Review*, April 2003, Table 6.2). Coal generation, as measured in million kilowatthours, grew 1.1 percent in 2002, with coal continuing to provide more than 50 percent of electricity net generation (see EIA *Monthly Energy Review*, April 2003, table 7.2a). Gas, hydro, and nuclear electric generation were all higher in 2002. Increased generation in general is attributed primarily to the warmer than average summer and cooler winter temperatures in the East (compared to 2001) toward the very end of 2002. Edison Electric Institute reported record weekly electric output demand a number of times last summer due to high temperatures in the East.

In assessing 2002, consumer stockpile levels in the electric power sector, the return and increase in competing electric power fuels, weather factors, and continued downturn in the manufacturing sector, among other issues, were cited as factors behind the decline in coal production. Several larger companies reduced their mine production in response to lower demand for coal in 2002.

- Competing fuels displaced some coal capacity - Sufficient rainfall in the Pacific Northwest promoted the return of much of the United States' hydroelectric power in 2002; new smaller and more efficient natural gas power plants (almost 55 GW's of new capacity) displaced some older gas/oil plant capacity and even some coal capacity in 2002. Natural gas wellhead prices, which were in the $4 per thousand cubic foot range in 2001, came down below $3 per thousand cubic foot throughout much of 2002, making natural gas more attractive as a fuel source for electric power. In addition, electric transmission bottlenecks favored gas-fired generating facilities over coal in some in some cases, while the U.S. nuclear power fleet continued to maximize capacity utilization levels, reaching a record 780.1 billion kilowatthours of generation in 2002.
- Stockpile reductions – Coal generator stockpiles, which had been built up in late 2001 to 138.5 million short tons (EIA estimate) in anticipation of normal winter temperatures, remained high due to the warmer than average winter of 2002. Power producers drew down stockpiles during the east coast's very warm summer months of July, August, and September. Despite this drawdown, stocks remained at higher than desired levels through year end (142 million tons), allowing power producers to postpone some coal purchases. Many have shown an interest in carrying smaller coal stockpiles for the purpose of reducing carrying charges and debt. In some areas of the country, generators appear to

National Mining Association - 101 Constitution Avenue, NW, Suite 500 East - Washington, DC 20001 - Phone (202) 463-2600

be less concerned about the ability of the railroads and coal producers to provide the coal they need on short notice given the reliability of both in recent years, and perhaps because they may be able to purchase power from other sources if needed. EIA estimated total consumer and producer stockpile levels to be approximately 180.9 million tons at the end of 2002, down 0.6 percent from the level of 181.9 million tons in 2001. Of the total, consumer stockpiles were up 2.0 percent, while producer-distributor stockpiles were estimated to be down nearly 11 percent.

- Weather – The combination of mild winter and spring temperatures for the first half of 2002, followed by warmer than average summer temperatures (Eastern U.S.), and November temperatures below normal, contributed to the slight increase in electric power sector coal consumption and coal electricity generation by year end.
- Economy – A weakened industrial sector, particularly in the later half of 2002, dampened electricity demand from a coal perspective, especially in light of increased nuclear and hydroelectric generation.
- Other factors – Other factors impacting the coal market include: 1) the ongoing strength in capacity utilization in coal-based generation as power producers utilize their coal plants to higher capacity levels; 2) the environmental regulation-driven tendency to blend (or substitute) lower-Btu Western coal from the Powder River Basin with Eastern coal, which can mean rising consumption to maintain equivalent output; 3) the uncertainty and delay in mine permitting and re-permitting ability in the central Appalachian region occurring as a result of the May 8 Judge Haden decision banning future permits for mines with valley fills under section 404 of the Clean Water Act (injunction overturned in April 2003); 4) the continued decline in demand for U.S. coal for export due to lower demand abroad and competition from lower cost producers; and 5) extended plant outages in order to install additional emissions control equipment to meet NO_X regulations taking effect in 2003 – 2004.

Coal Industry Consolidation and Reorganization Activities

Several companies took the opportunity to add to their coal assets by purchasing coal properties. Peabody Energy purchased Beaver Dam Coal Company, a western Kentucky holder of coal reserves, in June 2002. Peabody purchased a 25% interest in Arclar Company, LLC (September 2002). In April 2003, Peabody completed the purchase of the final 18% of Black Beauty Coal. Since Arclar was owned primarily by Black Beauty Coal Company, these two purchases complete Peabody's ownership of both Arclar and Black Beauty. In December 2002, Peabody sold two coal reserve properties to Penn Virginia Resource Partners. BHP Billiton's San Juan mine was converted from a surface mine to an underground longwall operation reaching full operating capacity in late 2002. Pittston sold some of its West Virginia coal assets to Amvest Corporation in January 2002, most of its Kentucky coal assets to Massey Energy in July 2002, and its Virginia assets to Alpha Natural Resources, LLC in December 2002. Natural Resource Partners purchased most of the coal reserve assets of El Paso Corp.'s Coastal Coal operations (December 2002). (Sources: Platts *Coal Outlook*, company press releases, and industry news articles).

In 2002, several U.S. coal companies filed for chapter 11 bankruptcy protection: Lodestar Energy (since March 2001); Pen Holdings (May 2002); White Mountain Mining (June 2002); Anker Energy (October 2002); Horizon Natural Resources (formerly AEI, Horizon refiled papers November 2002). (Sources: Platts *Coal Outlook*, company press releases, and industry news articles).

Major Coal Producing Companies, Mines and Mine Complexes in 2002 (Tables 2-5)

In 2002, Peabody Energy Corporation again as the largest coal producer in the United States with output (including sales) of 197.5 million short tons, approximately 18 percent of total U.S. coal production. The second largest was Arch Coal, Inc. with 116.5 million tons, 10.7 percent of total U.S. coal production.

The third was Kennecott Energy Company with 116 million tons, 10.6 percent of U.S. production, and the fourth largest coal producer, RAG American Coal Holding, Inc., had output of 71 million tons, 6.5 percent of U.S. production. The fifth largest producer was CONSOL Energy Inc., with 66.2 million tons, and 6.1 percent of production. The top ten coal producing companies listed in this survey account for more than 68 percent of total U.S. production, up slightly from 2001.

Table 1, compiled by National Mining Association (NMA) from data supplied through its recent survey of the major coal producers, shows 2002 production for 41 coal producing companies in the United States. Foreign coal production (production outside the U.S.) was only reported this year by two of the coal companies (CONSOL and Peabody).

According to the 2002 survey, the top four underground mines in terms of production were the Bailey Mine and the Enlow Fork Mine in Pennsylvania (both CONSOL Energy Inc.), the SUFCO Mine in Utah (Arch Coal, Inc.), and the Twentymile Mine in Colorado (The RAG American Coal Holding Company, Inc.), The four top producing surface mines in 2002 were the North Antelope/Rochelle Mine (Peabody Energy), Black Thunder Mine (Arch Coal, Inc.), the Cordero Rojo Mine (Kennecott Energy Company), and the Jacobs Ranch Mine (Kennecott Energy Company), all located in Wyoming’s Powder River Basin coal region. A list of major underground and surface operations is found in Tables 2 and 3. Table 4 shows the 2002 output of major multi-mine production complexes. Kennecott Energy's Cordero-Rojo complex was the largest multi-mine complex with 38.2 million tons, second was Massey Energy’s Sidney mine (7.3 million tons). Arch Coal, Inc.'s Hobet 21 was third with 5.3 million tons, and Peabody Energy's Arclar Mining was fourth (5.0 million tons).

Major U.S. Coal Reserve Holders in 2002 (Table 5)

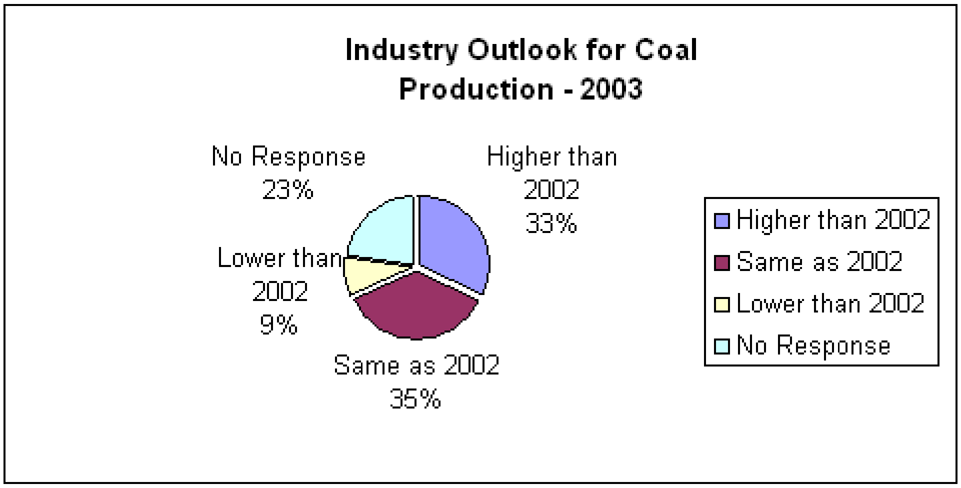
The U.S. government holds the most coal reserves, with approximately 91.3 billion short tons of estimated recoverable coal reserves. The figure is based on the U.S. Bureau of Land Management's estimation that the Federal government holds about one-third ownership of the nation's coal resources. Great Northern Properties Limited Partnership reported the second largest reserve holding with 20 billion tons. Third, was Peabody Energy with 9.0 billion tons. Fourth and fifth were CONSOL Energy, Inc., and Arch Coal, Inc. with 4.2 billion tons and 2.9 billion tons, respectively. Table 5 ranks the top holders of U.S. coal reserves.

General Market Outlook for 2003 U.S. Coal Production

An optional survey question added to the form this year asked about the companies’ general market outlook for 2003 U.S. coal production. Of the 43 companies responding, 35 percent reported that they expect 2003 production to be at the same level as last year, 33 percent expect it to be higher than 2002, 9 percent expect lower production, and 23 percent chose not to respond.

Industry Outlook for Coal Production - 2003

	Responses	Percent
Higher than 2002	14	33%
Same as 2002	15	35%
Lower than 2002	4	9%
No Response	10	23%
Total	43	100%



Survey Methodology

Coal producers were asked to provide their company's total U.S. coal production, foreign production, and reserve holdings for 2002. They also were asked to name their mines and the production output of the mine using the following criteria: surface mines, production of 2 million tons or greater; underground mines, 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 a facility 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 as possible, whether or not a National Mining Association (NMA) member. A total of 48 coal companies were surveyed for their production and/or reserves. A copy of the survey form is appended to this report. Individual survey responses are kept confidential.

Notes: The production figures reported in this survey are intended to reflect ownership of mine production as of the end of calendar year 2002. 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 *Coal Data* publications, and prior to 1998, in NMA *Facts About Coal* publications and Primedia Publishing's *Keystone Coal Industry Manual* editions. NMA's 2003 Coal Producer Survey (2002 data) is made available in PDF format on the NMA web site: www.nma.org.

TABLE 1

Major U.S. Coal Producers - 2002
(Million Short Tons)

	Company	Production Tonnage	Percent of Total U.S.
1.	Peabody Energy Corporation [1]	197.5	18.1%
2.	Arch Coal, Inc. [2]	116.5	10.7%
3.	Kennecott Energy Company [3]	116.0	10.6%
4.	RAG American Coal Holding, Inc.	71.0	6.5%
5.	CONSOL Energy Inc.	66.2	6.1%
6.	Massey Energy Company	44.0	4.0%
7.	Triton Coal Company, LLC (Vulcan)	42.2	3.9%
8.	Horizon Natural Resources Company	37.6	3.4%
9.	The North American Coal Corporation	33.5	3.1%
10.	Westmoreland Coal Company	25.7	2.3%
11.	TXU Mining (Texas Utilities)	23.7	2.2%
12.	Murray Energy Corporation	19.0	1.7%
13.	Alliance Resource Partners	16.4	1.5%
14.	BHP Billiton	15.6	1.4%
15.	Kiewit Mining Group, Inc. [4]	15.0	1.4%
16.	The Pittsburg & Midway Coal Mining Company	14.1	1.3%
17.	James River Coal Company	12.6	1.2%
18.	Interwest Mining Company (Sub. Of PacifiCorp)	9.9	0.9%
19.	TECO Coal Corporation	9.3	0.9%
20.	Coastal Coal Company, LLC	9.0	0.8%
21.	Pittston Coal Company	7.2	0.7%
22.	Andalex Resources, Inc.	6.8	0.6%
23.	Transalta Centralia Mining LLC [6]	5.8	0.5%
24.	Aluminum Company of America (ALCOA Inc.)	5.6	0.5%
25.	Jim Walter Resources, Inc.	5.5	0.5%
26.	U.S. Steel Mining Company LLC	5.4	0.5%
27.	Western Fuels Association, Inc.	5.3	0.5%
28.	American Electric Power Service Corp. (AEP) [5]	5.1	0.5%
29.	AMVEST Minerals Company LLC	5.0	0.5%
30.	BNI Coal, LTD	4.6	0.6%
31.	Black Hills Corporation	4.1	0.4%
32.	Drummond Company, Inc.	4.0	0.4%
33.	Anker Coal Group, Inc.	3.3	0.4%
34.	Monterey Coal Company (ExxonMobil)	3.3	0.3%
35.	Dolet Hills Lignite Company (Sub. of AEP)	3.2	0.3%
36.	Oxford Mining Company	2.9	0.3%
37.	Lodestar Energy, Inc. [6]	2.9	0.3%
38.	Trapper Mining Inc.	2.0	0.3%
39.	Usibelli Coal Mine, Inc.	1.2	0.2%
40.	Sun Coke Company	1.1	0.1%
41.	Cravat Coal Company	0.6	0.1%
42.	Other Producers	114.2	10.4%
	Total U.S. Production	**1,093.8**	**100.0%**

Notes: Figures are rounded. 2002 data compiled from 2003 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 2002 is an EIA preliminary estimate.

[1] Peabody Energy Corp. production figure includes production plus sales tonnage. Includes Black Beauty tonnage.

[2] Arch Coal production figure includes 65% interest (tonnage) in Canyon Fuels.

[3] Kennecott Energy production figure includes 50% interest (tonnage) in Decker Mine.

[4] Kiewit production figure includes 100% of tonnage from Decker, Black Butte, and Walnut Creek mines.

[5] AEP production figure excludes tonnage from Dolet Hills Lignite Co.

[6] Mine Safety & Health Administration preliminary data.

TABLE 2

Major U.S. Underground Coal Mines - 2002
(Million Short Tons)

	Mine Name	Location	Tonnage	Operating Company
1.	Bailey	Pennsylvania	9.7	CONSOL Energy Inc.
2.	Enlow Fork	Pennsylvania	9.6	CONSOL Energy Inc.
3.	SUFCO[1]	Utah	7.6	Canyon Fuel Company (Arch)
4.	Twentymile	Colorado	7.6	Twentymile Coal Company
5.	Cumberland	Pennsylvania	6.6	RAG Cumberland Resources LP
6.	Emerald	Pennsylvania	6.6	RAG Emerald Resources LP
7.	West Elk	Colorado	6.6	Arch Coal, Inc.
8.	Galatia	Illinois	6.3	The American Coal Co.
9.	Bowie No. 2	Colorado	5.4	Bowie Resources, Ltd. (Horizon)
10.	Federal No. 2	West Virginia	5.0	Peabody Energy Subsidiary
11.	Robinson Run	West Virginia	5.0	CONSOL Energy Inc.
12.	Blacksville No. 2	West Virginia	4.8	CONSOL Energy Inc.
13.	McElroy	West Virginia	4.7	CONSOL Energy Inc.
14.	Dotiki	Kentucky	4.5	Webster County Coal LLC (Alliance)
15.	Mountaineer	West Virginia	4.2	Arch Coal, Inc.
16.	Buchanan	Virginia	4.1	CONSOL Energy Inc.
17.	Jones Fork	Kentucky	4.0	CONSOL of Kentucky Inc.
18.	Deer Creek	Utah	4.0	Energy West Mining Co.
19.	Eighty-Four Mine	Pennsylvania	4.0	CONSOL Energy Inc.
20.	Shoal Creek	Alabama	4.0	Drummond Company, Inc.
21.	Powhatan No. 6	Ohio	3.9	The Ohio Valley Coal Co.
22.	Dilworth	Pennsylvania	3.6	CONSOL Energy Inc.
23.	U.S. Steel No. 50	West Virginia	3.5	U.S. Steel Mining Co., LLC
24.	Skyline[1]	Utah	3.5	Canyon Fuel Company (Arch)
25.	Upper Big Branch	West Virginia	3.4	Performance Coal Co. (Massey)
26.	North River	Alabama	3.4	Pittsburg & Midway Coal Mining Co.
27.	Shoemaker	West Virginia	3.4	CONSOL Energy Inc.
28.	Century	Ohio	3.4	American Energy Corp.
29.	Crandall	Utah	3.3	Genwal Resources, Inc.
30.	Monterey No. 1	Illinois	3.3	Monterey Coal Co. (Exxon Mobil)
31.	Harris No. 1	West Virginia	3.2	Peabody Energy Subsidiary
32.	Mill Creek	Kentucky	3.0	CONSOL Energy Inc.
33.	Mettiki	Maryland	2.9	Mettiki Coal LLC (Alliance)
34.	Baker	Kentucky	2.9	Lodestar Energy, Inc.
35.	No. 4	Alabama	2.8	Jim Walter Resources
36.	West Ridge	Utah	2.8	West Ridge Resources Inc.
37.	Paradise	Kentucky	2.6	KenAmerican Resources, Inc.
38.	Justice	West Virginia	2.6	Independence Coal Co. (Massey)
39.	Mine 11	Illinois	2.5	Old Ben Coal Co. (Horizon)
40.	Maple Creek	Pennsylvania	2.5	Maple Creek Mining, Inc.
41.	Camp No. 11	Kentucky	2.4	Peabody Energy Subsidiary
42.	Rockspring	West Virginia	2.2	Rockspring Development, Inc. (RAG)
43.	VP #8	Virginia	2.2	CONSOL Energy Inc.
44.	Willow Lake	Illinois	2.1	Peabody Energy Subsidiary
45.	Dugout Canyon[1]	Utah	2.1	Canyon Fuel Company (Arch)
46.	No. 7	Alabama	2.0	Jim Walter Resources
47.	Air Quality No. 1	Indiana	1.9	Peabody Energy Subsidiary
48.	Gibson	Indiana	1.9	Gibson County Coal, LLC (Alliance)
49.	Oak Grove	Alabama	1.9	U.S. Steel Mining Co., LLC
50.	Pattiki	Illinois	1.9	White County Coal LLC (Alliance)
51.	Freedom Energy	Kentucky	1.8	Sidney Coal Company (Massey)
52.	San Juan	New Mexico	1.8	BHP Billiton
53.	Excel	Kentucky	1.7	Excel Mining, LLC (Alliance)
54.	Rend Lake	Illinois	1.7	CONSOL Energy Inc.
55.	Stockton	West Virginia	1.6	Cannelton Industries (Horizon)
56.	Wabash	Illinois	1.5	Wabash Mine Holding Co. (RAG)
57.	Harrison	Ohio	1.4	AEP Ohio Coal, LLC
58.	Huff Creek	Kentucky	1.3	Arch Coal, Inc.
59.	MC Mining	Kentucky	1.3	MC Mining, LLC (Alliance)
60.	Windsor	West Virginia	1.3	CONSOL Energy Inc.
61.	Darby Fork	Kentucky	1.2	Arch Coal, Inc.
62.	East Dingess	West Virginia	1.1	Marrowbone Development Co. (Horizon)
63.	Solid Energy	Kentucky	1.0	Sidney Coal Company (Massey)
64.	Tower Division	Utah	0.7	Andalex Resources Inc.
65.	No. 5	Alabama	0.7	Jim Walter Resources

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[1] Figure includes 100% of production from Canyon Fuels mines (Arch has 65% interest).

TABLE 3

Major U.S. Surface Coal Mines - 2002
(Million Short Tons)

	Mine Name	Location	Tonnage	Operating Company
1.	North Antelope/Rochelle	Wyoming	75.4	Peabody Energy Subsidiary
2.	Black Thunder	Wyoming	65.9	Arch Coal, Inc.
3.	Cordero Rojo	Wyoming	38.2	Kennecott Energy Co.
4.	Jacobs Ranch	Wyoming	31.7	Kennecott Energy Co.
5.	Antelope	Wyoming	26.8	Kennecott Energy Co.
6.	Caballo	Wyoming	26.0	Peabody Energy Subsidiary
7.	Eagle Butte	Wyoming	24.9	RAG Coal West, Inc.
8.	North Rochelle	Wyoming	23.9	Triton Coal Co., LLC
9.	Buckskin	Wyoming	18.3	Triton Coal Co., LLC
10.	Belle Ayr	Wyoming	17.5	RAG Coal West, Inc.
11.	Freedom	North Dakota	15.7	The Coteau Properties Co.
12.	Martin Lake	Texas	11.7	Texas Utilities Mining Co. (TXU)
13.	Rosebud [1]	Montana	10.1	Western Energy Co. (Westmoreland)
14.	Decker [2]	Montana	9.9	Kiewit Mining Group, Inc.
15.	Spring Creek	Montana	8.9	Kennecott Energy Co.
16.	Kayenta	Arizona	8.3	Peabody Energy Subsidiary
17.	Navajo	New Mexico	8.1	BHP Billiton
18.	Monticello	Texas	7.7	Texas Utilities Mining Co. (TXU)
19.	Falkirk	North Dakota	7.6	The Falkirk Mining Co.
20.	Jewett[1]	Texas	7.1	Northwestern Resources Co. (Westmoreland)
21.	Lee Ranch	New Mexico	6.2	Peabody Energy Subsidiary
22.	Bridger	Wyoming	5.8	Bridger Coal Co.
23.	Centralia	Washington	5.8	Transalta Centralia Mining LLC
24.	McKinley	New Mexico	5.8	The Pittsburg & Midway Coal Mining Co.
25.	Sandow	Texas	5.6	Aluminum Co. of America (ALCOA)
26.	Colowyo	Colorado	5.3	Kennecott Energy Co.
27.	Samples	West Virginia	5.2	Arch Coal, Inc.
28.	Absaloka [3]	Montana	5.2	Westmoreland Resources Inc. (WRI)
29.	Hobet 21	West Virginia	5.1	Arch Coal, Inc.
30.	Dry Fork	Wyoming	4.9	Western Fuels-Wyoming
31.	Black Mesa	Arizona	4.6	Peabody Energy Subsidiary
32.	Center	North Dakota	4.6	BNI Coal, Ltd.
33.	Big Brown	Texas	4.3	Texas Utilities Mining Co. (TXU)
34.	Kemmerer	Wyoming	4.2	The Pittsburg & Midway Coal Mining Co.
35.	Fola Coal	West Virginia	4.2	Fola Coal Co.
36.	Farmersburg	Indiana	4.1	Peabody Energy Subsidiary
37.	Wyodak	Wyoming	4.1	Wyodak Resources Dev. Corp.
38.	Sabine	Texas	4.0	Sabine Mining
39.	La Plata	New Mexico	4.0	BHP Billiton
40.	Somerville Complex	Indiana	3.9	Peabody Energy Subsidiary
41.	Wildcat MTR	West Virginia	3.6	Nicholas Energy Co. (Massey)
42.	San Juan	New Mexico	3.5	BHP Billiton
43.	Rawhide	Wyoming	3.4	Peabody Energy Subsidiary
44.	San Miguel Lignite	Texas	3.3	San Miguel Lignite
45.	Dolet Hills Lignite	Louisiana	3.2	Dolet Hills Lignite Co. (Sub. of AEP)
46.	Somerville Central	Indiana	3.1	Peabody Energy Subsidiary
47.	Ruffner	West Virginia	3.1	Arch Coal, Inc.
48.	Beulah [1]	North Dakota	3.0	Dakota Westmoreland Corp.
49.	Evergreen	West Virginia	3.0	Evergreen Mining (Horizon)
50.	Black Butte	Wyoming	2.9	Kiewit Mining Group, Inc.
51.	Twilight MTR	West Virginia	2.9	Progress Coal Company (Massey)
52.	Big Sky	Montana	2.8	Peabody Energy Subsidiary
53.	Cottage Grove	Illinois	2.6	Peabody Energy Subsidiary
54.	Black Castle	West Virginia	2.4	Black Castle Mining Company (Massey)
55.	Francisco	Indiana	2.4	Peabody Energy Subsidiary
56.	Red Hills	Mississippi	2.3	Mississippi Lignite
57.	Walnut Creek	Texas	2.1	Kiewit Mining Group, Inc.
58.	Trapper [4]	Colorado	2.0	Trapper Mining Inc.

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[1] Subsidiary of Westmoreland Mining LLC.

[2] Mine jointly owned by Kiewit Mining Group, Inc. (Level 3 Communications) and Kennecott Energy Co. (50% each).

[3] 80% owned by Westmoreland Coal Company.

[4] Tonnage sold.

TABLE 4

Major Multi-Mine Production Complexes - 2002
(Million Short Tons)

	Complex Name	Location	Tonnage	Company
1.	Cordero-Rojo	Wyoming	38.2	Kennecott Energy Co.
2.	Sidney	Kentucky	7.3	Massey Energy Co.
3.	Hobet 21	West Virginia	5.3	Arch Coal, Inc.
4.	Arclar Mining, LLC	Illinois	5.0	Peabody Energy Subsidiary
5.	Nicholas Energy	West Virginia	4.6	Massey Energy Co.
6.	Mingo Logan	West Virginia	4.4	Arch Coal, Inc.
7.	Progress	West Virginia	4.3	Massey Energy Co.
8.	Bledsoe	Kentucky	4.2	Bledsoe Coal Corporation
9.	Jones Fork	Kentucky	4.0	CONSOL Energy Inc.
10.	Independence	West Virginia	3.7	Massey Energy Co.
11.	Premier Elkhorn	Kentucky	3.7	Premier Elkhorn Coal Co.
12.	Rob Fork Loadout	Kentucky	3.6	AEP Kentucky Coal, LLC
13.	Logan County Mine Services	West Virginia	3.6	Massey Energy Co.
14.	Arch of West Virginia	West Virginia	3.6	Arch Coal, Inc.
15.	Performance	West Virginia	3.4	Massey Energy Co.
16.	McCoy	Kentucky	3.1	McCoy Elkhorn Coal Corp.
17.	Martin County Coal Corp.	Kentucky	3.0	Massey Energy Co.
18.	Black Castle Mining	West Virginia	3.0	Massey Energy Co.
19.	Brooks Run	West Virginia	3.0	Coastal Coal-West Va., LLC
20.	Mill Creek	Kentucky	3.0	CONSOL Energy Inc.
21.	Rocklick Business Unit	West Virginia	2.9	Peabody Energy Subsidiary
22.	Tug Valley	West Virginia	2.8	Marrowbone Develop. Co.
23.	Toms Creek	Virginia	2.8	Coastal Coal Company, LLC
24.	Marfolk	West Virginia	2.8	Massey Energy Co.
25.	Delbarton	West Virginia	2.8	Massey Energy Co.
26.	Patriot Business Unit	Kentucky	2.7	Peabody Energy Subsidiary
27.	Kingwood	West Virginia	2.6	Coastal Coal-West Virginia LLC
28.	Lone Mountain	Kentucky	2.6	Arch Coal, Inc.
29.	Blue Diamond	Kentucky	2.5	Blue Diamond Coal Co.
30.	Clintwood Elkhorn	Kentucky & Virginia	2.4	Clintwood Elkhorn Mining
31.	Perry County	Kentucky	2.4	Perry County Coal
32.	Wells Business Unit	West Virginia	2.3	Peabody Energy Subsidiary
33.	Hopkins County Coal	Kentucky	2.2	Hopkins County Coal, LLC
34.	Coal-Mac	West Virginia	2.1	Arch Coal, Inc.
35.	Elk Run	West Virginia	2.1	Massey Energy Co.
36.	Alloy Barge Dock	West Virginia	2.0	Vandalia Resources, Inc.
37.	Rawl Sales & Processing	West Virginia	1.9	Massey Energy Co.
38.	Riola No. 1/ Vermilion Grove	Illinois	1.9	Peabody Energy Subsidiary
39.	Moss 3 Preparation Plant	Virginia	1.9	Clinchfield Coal Company
40.	Roxana	Kentucky	1.7	Coastal Coal Co., LLC
41.	Lady Dunn	West Virginia	1.7	Cannelton Industries
42.	Pioneer	West Virginia	1.6	Pioneer Fuel Corp.
43.	Laurel Creek	West Virginia	1.6	Laurel Creek Co., Inc.
44.	Pardee	Virginia	1.6	Arch Coal, Inc.
45.	Leeco, Inc.	Kentucky	1.5	Leeco, Inc.
46.	Midwest Business Unit	Kentucky	1.4	Peabody Energy Subsidiary
47.	McClure River Plant	Virginia	1.4	Clinchfield Coal Company
48.	Ramsey Preparation Plant	Virginia	1.3	Paramount Coal Corporation
49.	Bell	Kentucky	1.3	Bell County Coal Corp.
50.	Spruce Fork Division	West Virginia	1.2	Anker West Virginia Mining Co. Inc.
51.	Campbells Creek	West Virginia	1.1	Arch Coal, Inc.
52.	Dominion	Virginia	0.5	Dominion Coal Corp.

Notes: Figures are rounded. 2002 data compiled from 2003 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.
A multimine complex is a facility that processes production from more than one mine.

TABLE 5

Major Holders of U.S. Coal Reserves - 2002
(Billion Short Tons)

	Holder	Estimated Reserves
1.	U.S. Government	91.300 *
2.	Great Northern Properties Limited Partnership	20.000
3.	Peabody Energy Corporation [1]	9.000
4.	CONSOL Energy Inc.	4.200
5.	Arch Coal, Inc. [2]	2.927
6.	The North American Coal Corporation	2.600
7.	Massey Energy Company	2.206
8.	RAG American Coal Holding, Inc.	1.985
9.	Kennecott Energy Company	1.890
10.	Pocahontas Land Corp. (Norfolk Southern Corp.)	1.810
11.	Horizon Natural Resources Company	1.600
12.	Natural Resource Partners L.P.	1.400
13.	Westmoreland Coal Company	1.344
14.	BHP Billiton	1.135
15.	Murray Energy Corporation	1.100
16.	Pittston Coal Company	1.100
17.	Triton Coal Company, LLC	0.744
18.	TXU Mining Co. (Texas Utilities)	0.650
19.	BNI Coal, LTD	0.620
20.	Penn Virginia Resource Partners, LP	0.615
21.	Kentucky River Properties LLC	0.550
22.	Western Pocahontas Properties Limited Properties	0.500
23.	Anker Coal Group, Inc.	0.453
24.	Coastal Coal Company, LLC	0.417
25.	Alliance Resources Partners	0.417
26.	Lodestar Energy, Inc.	0.414
27.	Kiewit Mining Group, Inc.	0.390
28.	Western Fuels Association, Inc.	0.289
29.	Black Hills Corp.	0.273
30.	Usibelli Coal Mine, Inc.	0.250
31.	TECO Coal Corporation	0.225
32.	Interwest Mining Company (Sub. of PacifiCorp)	0.213
33.	AMVEST Minerals Company LLC	0.187
34.	The Pittsburg & Midway Coal Mining Co.	0.186
35.	Jim Walter Resources, Inc.	0.165
36.	U.S. Steel Mining Company, LLC	0.121
37.	Sun Coke Company	0.109
38.	American Electric Power Services Corp. (AEP)	0.100
39.	Monterey Coal Co. (ExxonMobil)	0.087
40.	Andalex Resources, Inc.	0.070
41.	Dolet Hills Lignite Company (Sub. of AEP)	0.045
42.	Trapper Mining Inc.	0.024
43.	Aluminum Company of America (ALCOA)	0.019
44.	Cravat Coal Company	0.015
45.	Oxford Mining Co.	0.014
46.	Pacific Coast Coal Company	0.002
47.	James River Coal Company	N/A
48.	Drummond Company, Inc.	N/A

Notes: 2002 data compiled from 2003 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 of the United States' coal resources (Bureau of Land Management, 1993) and estimated recoverable reserves of 274 billion short tons (Energy Information Administration, 2000).
N/A = Not Available. [1] Includes Black Beauty. [2] Includes 100% of Canyon Fuels reserves.