National Mining Association

2009 Coal Producer Survey • May 2010

THE NATIONAL MINING ASSOCIATION
2009 COAL PRODUCER SURVEY

May 2010

The Coal Industry In 2009

Production – The global economic recession had a broad affect on energy fuels as well as other commodities in 2009, making for a challenging year for the coal industry in the United States. According to Energy Information Administration (EIA) preliminary figures, total coal production stood at 1,072.8 million short tons, marking a decrease of 99.1 million tons, an 8.5 percent drop from 2008.

Eastern coal (east of the Mississippi River) accounted for 41.8 percent of production (447.9 million tons including production from refuse recovery), while production in the West accounted for 58.2 percent (624.9 million tons). Eastern coal production was down approximately 9 percent in 2009, with decreases occurring in most eastern states except Illinois, Indiana, Ohio, and Mississippi. Production in the West was down 7.9 percent, with decreases in nearly every western state except Alaska, North Dakota and Missouri.

Total U.S. coal consumption is expected to rebound to some extent in 2010, as improving domestic and economic factors are influenced by stronger demand for metallurgical coal, greater demand for electricity and some exported coal. High coal stockpiles by the electric power sector are expected to keep 2010 production slightly below 2009 levels. In addition to weak economic conditions, coal production was impacted by displacement of coal demand by lower priced natural gas prices. The overall generation picture is also being impacted to a lesser degree by an increase in other renewable generation - primarily wind and biofuels as a result of state renewable fuels mandates.

Consumption and Inventories – Domestic coal consumption totaled 1,000.4 million tons in 2009, marking a decrease of 10.7 percent (120.1 million tons). As previously noted, this was primarily due to the combination of the slow economy in general and competition from natural gas and other fuels. Electric power sector consumption was down nearly 10 percent. Power producers used an estimated 936.5 million tons of coal, about 104 million tons less than in 2008.

Demand for coking coal in the U.S. was down 30.6 percent in 2009. Other industrial demand, which includes other industrial combined heat and power and industrial fuels, decreased 16.6 percent, while the commercial/residential sector was down 8.4 percent from 2008. Consumer stock inventories ended the year at 197.6 million tons, marking a nearly 16 percent stock-build in 2009. Producer/distributor stockpiles were 41.3 million tons, up 18.9 percent in 2009.

Power Generation – nearly 93 percent of U.S. coal production is used to generate electricity. Preliminary EIA data indicate that coal-based power generation from all sectors decreased 11 percent to 1,764.5 billion kWhrs in 2009, with coal continuing to provide close to half (45 percent) of total electricity net generation.

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According to EIA estimations, approximately 18 percent or 4,785 MW of new power capacity additions in 2009 were coal-based. That number is expected to increase to nearly 30 percent (5,932 MW) in 2010.

As in recent years, the greatest percentage of electric power capacity additions in 2009 was natural gas-based (50 percent).

According to the National Energy Technology Laboratory (NETL), the following eight coal plants (totaling 3,218 MW) became operational in 2009: the 278 MW Hugh L. Spurlock plant; the 180 MW Clinton plant; the 18 MW Lamar plant; the 663 MW Nebraska City Unit 2 plant; the 817 MW Oak Grove plant; the 200 MW Dallman plant; the 662 MW Sandow 5; and the 400 MW Springerville plant. A total of 22 coal plants (13,755 MW of capacity) are still under construction and due to come on line between now and 2012. Recent analysis done by the American Public Power Association (APPA) reveals that an estimated 37.4 percent of all power plants currently under construction are coal plants, second to natural gas at 40.9 percent.

Exports – After significant growth in 2008, total U.S. exports of coal decreased 27 percent in 2009 to 59.1 million short tons. The 22 million ton drop was attributed to the global recession as the general demand for coal and other fuels and commodities slumped significantly. The average price per ton ($101.44 per short ton), was up 3.8 percent over 2008.

Metallurgical coal exports finished the year at 37.3 million tons, down 12 percent, as demand for U.S. coking coal for international markets decreased in 2009. Most of the decrease in 2009 met coal demand was attributed to a drop in shipments to Europe, the United States' primary met coal customer, which took nearly 20 million tons, down 22.8 percent (5.8 million tons) from 2008. In the North American market, metallurgical coal shipments to Canada were down 33.6 percent, and shipments to Mexico were down 14.1 percent. Metallurgical coal to South America was up 23.1 percent, and coal to Asia increased 32.2 percent, while coal shipments to Africa dropped 45.1 percent.

Steam coal exports, including lignite and anthracite, decreased by 44 percent to nearly 22 million tons in 2009, driven by reduced shipments to Canada and Europe. In addition, the U.S. shipped 43.6 percent less steam coal to South America and 13.4 percent less to Asia. Canada, formerly the United States' largest customer, took only 8.2 million tons, down 57.6 percent from 19.4 million tons in 2009. Europe took the lead as the United State's largest steam coal importing region in 2009.

Imports - Coal imports decreased 33.8 percent to 22.6 million tons in 2009, with the U.S. receiving less coal from all regions. As in past years, most imported coal came from South America, with Colombia representing a 79 percent share of total imports. Other major U.S. coal import suppliers were Indonesia, Venezuela and Canada. The coal was imported primarily 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 account for about 2 percent of total U.S. coal supply.

Key Coal Supply and Demand Factors in 2009

Competing Fuels/Energy Sources – EIA estimates that approximately 11,388 MW of new natural gas electric generating capacity came online in 2009, representing 42 percent of total new nameplate generating capacity. The average cost of natural gas delivered to electric generating plants was $4.70 per MMBtu in 2009, $9.02 per MMBtu in 2008, $7.11 per MMBtu in 2007 and $6.94 MMBtu in 2006, according to EIA. Natural gas prices continued to remain lower in 2009 as gas in storage accumulated with the drop in demand during the economic slump. Average annual natural gas spot prices (Henry Hub) decreased 50 percent in 2009 to $4.06 per MMBtu, fluctuating in a range of $2-6 per MMBtu over the course of the year.

Natural gas consumption by the electricity sector increased 3 percent in 2009, primarily due to power generators switching to natural gas while the price was comparatively low. Net generation from natural gas (920.4 billion kWh) was up 4.2 percent and represented a 23.3 percent share of total net generation, up considerably from 21.4 in 2008.

Net generation from nuclear plants decreased modestly by 0.9 percent in 2009 to 798.7 billion kWh, with nuclear plants contributing 20.2 percent of total generation. Like coal generation, nuclear was impacted by lower demand for electric power nationally. 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. In general, the U.S. nuclear power fleet has increased capacity utilization levels in recent years (currently averaging nearly a 91 percent capacity factor). The Nuclear Regulatory Commission (NRC) also allows nuclear plants to increase their capacity and output through power uprates. According to the NRC, there were 4 plants (168 MW) that received approval for power uprates in 2009, with another 4 plants (534 MW) expecting to receive approval in 2010.

Hydro generation, principally in the Pacific region of the country, accounted for a 6.9 percent share of last year's generation at 272 billion kWh. Rainfall was more sufficient through much of 2009 resulting in a hydro power generation increase of 6.8 percent.

Wind generation in the U.S. represents 1.8 percent of total U.S. generation, but accounted for the largest percent increase in electric power generation in 2009, up nearly 28 percent.

Weather – There were several bouts of severe weather in 2009, including an ice storm in the central Appalachian region in February, a blizzard in parts of the West and Midwest region in March, and a snow storm and bitter temperatures in the East prior to Christmas. However, long-term effects of those storms appeared to be minimal given large consumer inventory levels. Preliminary data from the National Oceanic and Atmospheric Administration (NOAA) indicate that the winter of 2009 was slightly warmer than 2008 nationally, with heating degree-days (a relative measure of outdoor temperatures used as an index of energy use) 1.0 percent below average and 0.4 percent below 2009. Conversely, the summer was a bit cooler, requiring less electricity for air conditioning. As measured in cooling-degree days, it was 0.2 percent above average, but 2.5 percent below 2008. Regionally, the summer of 2009 was one of the coolest on record for some key coal consuming regions like the upper Midwest and the Ohio Valley. In addition, the northern Rocky Mountain and New England regions experienced cooler than average temperatures resulting in lower coal use.

Transportation – U.S. freight railroads originated nearly 7 million carloads of coal in 2009, down 11 percent from 2008 according to the Association of American Railroads (AAR). Coal shipment details for 2009 from the Waterborne Commerce Statistics Center are not yet available, but the center's tonnage indicator report revealed that the 2009 coal and coke tonnage indicator's cumulative average of monthly figures of 142.4 were down 6.6 percent from the 2008 level. Great Lakes shipments were 29.9 million tons, down 25 percent, based on Lake Carriers' Association preliminary data.

Economic Growth in 2009 – Gross Domestic Product (GDP), as measured in real terms, decreased 2.4 percent in 2009, according to the Bureau of Economic Analysis (BEA). Power generation in general and coal consumption from all sectors is negatively impacted when there is a drop in GDP.

Other Factors Impacting Coal –

- Increased average coal prices were evident both domestically and in the global market according to EIA preliminary data. Although coal spot prices decreased from 2008, a strengthening in contract prices occurred despite the sluggish economy. 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 8.2 percent in 2009 to $44.72 per ton, while coal prices to the industrial sector (excluding coke plants) were up 2.3 percent to $64.87 per ton. The average prices for coal being delivered to coke plants were up 21 percent to $143.01 per ton. Electric generators paid $2.23 per MMBtu for coal in 2009, up 8.3 percent over 2008. Average prices for U.S. coal for export were up 3.8 percent to $101.44 per ton, while prices for imports were up 6.8 percent to $63.91 per ton.
- Geologic constraints and permit delays in the East were at issue again in 2009, although operating cost abated due to the slower economy. Also in the East, reduced access to capital and incorporation and compliance with new MINER Act 2006 provisions were factors the industry contended with in 2009.
- 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.

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 July 2009, Alpha finalized its merger with Foundation Coal Holdings. The company operates under the Alpha Natural Resources name.

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

Arch Coal, Inc. – Arch completed its acquisition of Rio Tinto's Jacobs Ranch mine in the Powder River Basin in October 2009.

Essar Minerals – Essar, a conglomerate of India's Essar Global, purchased Trinity Coal Co. from Denham Capital in March 2010. Trinity owns and operates 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.

Massey Energy Co. – Massey acquired the reserves and operating assets associated with Foundation Coal's Laurel Creek operations in West Virginia in July 2009. In September, and later in November 2009, Massey acquired West Virginia coal reserves and other assets from now bankrupt Appalachian Fuels LLC. In April 2010, Massey completed acquisition of Cumberland Resources Corp. and its affiliated companies.

Mechel Mining OAO – In May 2009, Mechel, a leading Russian mining and metals company, acquired Bluestone Coal Group's coal production and reserve assets in West Virginia.

Monterey Coal Co. – In January 2009, ExxonMobil sold the Monterey No.1 mine to Cline Group affiliate, Macoupin Energy. Shortly after, Natural Resource Partners purchased the mine's coal reserves and related infrastructure assets.

National Coal Corp. – In April 2010, National Coal finalized an agreement to sell some of its assets to Ranger Energy Investments LLC, controlled by James Justice.

Oxford Mining Company – Oxford acquired some of Phoenix Coal Inc.'s Kentucky surface mines in late September 2009. Phoenix also sold its Gryphon reserves in Kentucky to an undisclosed major coal producer in May 2010.

Rio Tinto Energy America – In November 2009, the company spun off all but one of its remaining U.S. coal mines (Colowyo) in an initial public offering (IPO). The new company called Cloud Peak Energy, Inc. is comprised of the Antelope, Cordero Rojo and Spring Creek mines in the Powder River Basin. Rio Tinto retained a 48 percent interest in the Cloud Peak. As mentioned above, Rio Tinto sold its Jacobs Ranch mine to Arch Coal, Inc. in October 2009 (see Arch Coal, Inc.).

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.

United Coal Company – Metinvest Group, a Ukrainian steel and mining company, acquired United Coal in April 2009.

Walter Energy, Inc. – In April 2010, Walter agreed to purchase Chevron Mining's North River mine in Alabama.

Major Coal Producing Companies, Mines and Mine Complexes in 2009 (Tables 1-4)

Table 1, compiled by the National Mining Association from data collected through a survey of major coal producers, shows 2009 production for 40 coal producing companies in the United States. In 2009, Peabody Energy Corporation was the largest coal producer in the U.S., with output (including tons sold) of 192 million tons, representing nearly 18 percent of total U.S. coal production. The second largest was Arch Coal, Inc., with 147.7 million tons (including tons sold), representing nearly 14 percent of total U.S. coal production. Ranking third was Cloud Peak Energy with 93.3 million tons, 8.7 percent of U.S. production. The fourth largest coal producer, Alpha Natural Resources, Inc., had output of 85 million tons, 7.9 percent of U.S. production. The fifth largest producer was CONSOL Energy Inc., with 59.4 million tons, 5.5 percent of production. The top five coal producing companies in the survey account for approximately 54 percent of total U.S. production, while the top ten account for about 69 percent.

According to the survey (Table 2), the top five underground mines in terms of production were CONSOL's Enlow Fork Mine in Pennsylvania, with 11.1 million tons; CONSOL's Bailey Mine in Pennsylvania with 10.4 million tons; CONSOL's McElroy Mine in West Virginia with 9.9 million tons; Peabody's Twentymile Mine in Colorado, with 7.7 million tons; and Alpha's Cumberland Mine in Pennsylvania, with 6.8 million tons.

The five top producing surface mines (Table 3) in 2009 were Peabody Energy's North Antelope Mine, with 98.3 million tons; the Black Thunder Mine (Arch Coal), with 81.2 million tons; the Cordero Rojo Mine (Cloud Peak Energy), with 39.3 million tons; the Antelope Mine (Cloud Peak Energy), with 34 million tons; and the Jacobs Ranch Mine (Arch Coal), with 29 million tons. All are located in Wyoming's Powder River Basin coal region.

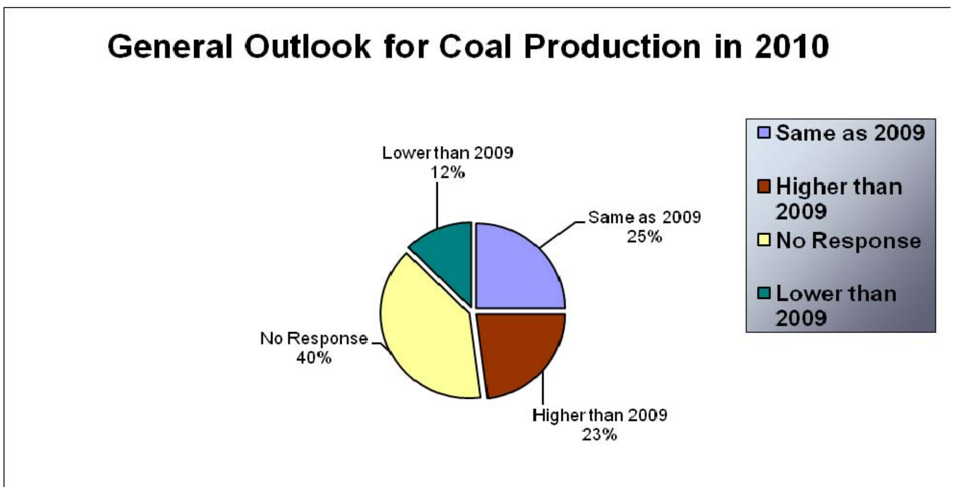
Table 4 shows the 2009 output of major multi-mine production complexes, which are operations that process coal production from several mines. Peabody Energy's Somerville Complex in Indiana was the largest multi-mine complex with 7.1 million tons; second was Murray Energy's American Coal Company Galatia complex in Illinois, with 6.3 million tons; third was Massey Energy's Progress Coal Company mining operation in West Virginia, with 5 million tons; fourth was International Coal Group's ICG Hazard operation in Kentucky, with 3.7 million tons; and fifth was Patriot Coal's Corridor G operation in West Virginia, with 3.6 million tons.

Major U.S. Coal Reserve Holders in 2009 (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 88 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 7.9 billion tons, and fourth and fifth were Arch Coal and Massey Energy with 3.9 billion tons and 2.4 billion tons, respectively. See Table 5 for the rankings of the top holders of U.S. coal reserves.

General Outlook for 2010 U.S. Coal Production

Coal companies were asked for their views on the outlook for 2010 U.S. coal production. Reflecting a somewhat pessimistic outlook for 2010, only 23 percent of the 48 survey respondents expected a stronger production year, 25 percent expect 2010 production to be at the same level as last year, 12 percent expect lower production, and 40 percent did not respond to this part of the survey. The National Mining Association expects total U.S. coal production to be down 0.7 percent from 2009, with production from Eastern coal fields down 2.9 percent.



Workforce Age Survey

NMA surveyed companies on the average age of each company's mine workforce in 2009. Of the 22 companies responding, 55 percent estimated the average age of their workforce to be in the 46–50 age range, 36 percent estimated it to be in the 41–45 year old range, and 9 percent in the 36–40 age range. The industry is expected to experience a gradual rise in younger mine workers as a percent of the total workforce as many workers are reaching retirement age. High wages and good benefits continue to entice a new generation of miners to enter the workforce. The nation's current very difficult economic 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 2009. 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 a 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.

Notes: The production figures reported in this survey are intended to reflect ownership of mine production as of the end of calendar year 2009. 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 - 2009
(Million Short Tons)

	Company	Production Tonnage	Percent of Total U.S.
1.	Peabody Energy Corporation [1]	192.0	17.9%
2.	Arch Coal, Inc. [2]	147.7	13.8%
3.	Cloud Peak Energy, Inc. [3]	93.3	8.7%
4.	Alpha Natural Resources, LLC (includes Foundation) [4]	85.0	7.9%
5.	CONSOL Energy Inc.	59.4	5.5%
6.	Massey Energy Company [5]	38.0	3.5%
7.	North American Coal Corporation	34.2	3.2%
8.	Kiewit Mining Group, Inc. [6]	33.4	3.1%
9.	Patriot Coal Corporation	31.4	2.9%
10.	Alliance Resource Partners	25.8	2.4%
11.	Murray Energy Corporation	25.1	2.3%
12.	Westmoreland Coal Company	24.2	2.3%
13.	Luminant (Energy Future Holdings)	22.7	2.1%
14.	International Coal Group (ICG)	16.3	1.5%
15.	BHP Billiton	15.7	1.5%
16.	Chevron Mining Inc.	9.8	0.9%
17.	James River Coal Company	9.8	0.9%
18.	Interwest Mining Company (Sub. of PacifiCorp)	9.4	0.9%
19.	TECO Coal Corporation	8.6	0.8%
20.	Trinity Coal Corporation [7]	7.4	0.7%
21.	Cumberland Resources Corporation [7]	6.9	0.6%
22.	Booth Energy Group[7]	6.7	0.6%
23.	Jim Walter Resources, Inc.	6.1	0.6%
24.	Black Hills Corporation (Wyodak Resources)	6.0	0.6%
25.	Oxbow Carbon & Minerals Inc.[7]	5.7	0.5%
26.	Western Fuels Association, Inc.	5.6	0.5%
27.	Rosebud Mining Company	5.4	0.5%
28.	Oxford Mining Company	5.1	0.5%
29.	CAM Holding LLC (Rhino Energy and Wexford)	4.7	0.4%
30.	BNI Coal, LTD	4.2	0.4%
31.	United Coal Company [7]	3.6	0.3%
32.	Vectren Fuels, Inc.	3.6	0.3%
33.	Rio Tinto Energy America [7]	3.6	0.3%
34.	Solar Sources, Inc.	3.0	0.3%
35.	Dolet Hills Lignite Company (Sub. of Amer. Elec. Pwr.)	3.0	0.3%
36.	Trapper Mining Inc.	2.1	0.2%
37.	Cliffs North American, LLC [7]	1.9	0.2%
38.	Usibelli Coal Mine, Inc.	1.9	0.2%
39.	Drummond Company, Inc.	1.6	0.1%
40.	National Coal Corporation	1.2	0.1%
	Other Producers	101.7	0.0%
	Total U.S. Production [8]	**1,072.8**	**100.0%**

Notes: Figures are rounded. 2009 data compiled from 2010 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 2009 is an EIA preliminary estimate.

[1] Peabody Energy Corp. production figure includes production plus tons sold, excluding trading and brokerage operations.
[2] Arch Coal, Inc. production figure includes tons sold. Excludes purchased tons. Includes Jacobs ranch mine production.
[3] Cloud Peak (Rio Tinto spinoff) production figure includes 50 percent interest in Decker Mine.
[4] Alpha Natural Resources figure includes Foundation Coal Holdings tonnage.
[5] Massey production figure includes production and excludes purchased tons.
[6] Kiewit production figure includes 50 percent interest in Decker Mine.
[7] Department of Labor, Mine Safety & Health Administration 2009 preliminary data.
[8] Department of Energy, Energy Information Administration 2009 preliminary data.

TABLE 2

Major U.S. Underground Coal Mines - 2009
(Million Short Tons)

	Mine Name	Location	Tonnage	Operating Company
1.	Enlow Fork	Pennsylvania	11.1	CONSOL Energy Inc.
2.	Bailey	Pennsylvania	10.4	CONSOL Energy Inc.
3.	McElroy	West Virginia	9.9	CONSOL Energy Inc.
4.	Twentymile	Colorado	7.7	Peabody Energy Subsidiary
5.	Cumberland	Pennsylvania	6.8	Pennsylvania Services (Alpha)
6.	Powhatan No. 6	Ohio	6.7	The Ohio Valley Coal Co. (Murray)
7.	SUFCO	Utah	6.6	Arch Coal, Inc.
8.	San Juan	New Mexico	6.5	BHP Billiton-New Mexico Coal
9.	Warrior	Kentucky	6.2	Warrior Coal, LLC (Alliance)
10.	Century	Ohio	6.0	American Energy Corp. (Murray)
11.	Loveridge	West Virginia	6.0	CONSOL Energy Inc.
12.	Elk Creek [1/]	Colorado	5.7	Oxbow Mining, LLC
13.	Emerald	Pennsylvania	5.6	Emerald Resources (Alpha)
14.	Robinson Run	West Virginia	5.6	CONSOL Energy Inc.
15.	Dotiki	Kentucky	4.2	Webster County Coal LLC (Alliance)
16.	West Elk	Colorado	4.0	Arch Coal, Inc.
17.	Elk Creek	Kentucky	4.0	Hopkins County Coal, LLC (Alliance)
18.	New Era	Illinois	3.9	American Energy Corp. (Murray)
19.	Blacksville No. 2	West Virginia	3.8	CONSOL Energy Inc.
20.	Mountaineer II / Mtn. Laurel	West Virginia	3.8	Arch Coal, Inc.
21.	Deer Creek	Utah	3.8	Energy West Mining Co. (Interwest)
22.	Federal	West Virginia	3.8	Eastern Associated Coal Co., LLC (Patriot)
23.	Highland	Kentucky	3.7	Highland Mining Co., LLC (Patriot)
24.	Blue Creek No. 7	Alabama	3.7	Jim Walter Resources
25.	Willow Lake	Illinois	3.5	Peabody Energy Subsidiary
26.	Gibson	Indiana	3.4	Gibson County Coal, LLC (Alliance)
27.	Bridger Underground	Wyoming	3.4	Bridger Coal Company (Interwest)
28.	Wells	West Virginia	3.4	Eastern Associated Coal Co., LLC (Patriot)
29.	Gateway	Illinois	3.4	Peabody Energy Subsidiary
30.	Dugout Canyon	Utah	3.2	Arch Coal, Inc.
31.	West Ridge	Utah	3.1	West Ridge Resources, Inc. (Murray)
32.	Elkhorn 1	Kentucky	3.1	Perry County Coal Corp. (TECO)
33.	Rocksprings	West Virginia	3.0	Rocksprings Operations (Alpha)
34.	Buchanan	Virginia	2.8	CONSOL Energy Inc.
35.	Skyline	Utah	2.8	Arch Coal, Inc.
36.	Blue Creek No. 4	Alabama	2.7	Jim Walter Resources
37.	North River	Alabama	2.7	Chevron Mining Inc.
38.	Prosperity	Indiana	2.6	Five Star Mining, Inc. (Vectren)
39.	Viper	Illinois	2.6	ICG Illinois, LLC
40.	Pattiki	Illinois	2.5	White County Coal LLC (Alliance)
41.	Mettiki	West Virginia	2.4	Mettiki Coal LLC (Alliance)
42.	New Future	Illinois	2.4	American Energy Corp. (Murray)
43.	Panther	West Virginia	2.1	Panther LLC (Patriot)
44.	Big Mountain	West Virginia	2.0	Pine Ridge Coal Co., LLC (Patriot)
45.	Francisco	Indiana	2.0	Peabody Energy Subsidiary
46.	Shoal Creek	Alabama	1.6	Drummond Company Inc.
47.	Air Quality No. 1	Indiana	1.6	Peabody Energy Subsidiary
48.	Matrix Energy No. 1 [1/]	Kentucky	1.6	Matrix Energy LLC (Booth)
49.	MC Mining	Kentucky	1.5	MC Mining, LLC (Alliance)
50.	Deep Mine No. 26	Virginia	1.5	Paramont Coal Company, LLC (Alpha)
51.	Hopedale	Ohio	1.5	Hopedale Mining LLC (Rhino/CAM)
52.	Crown III [1/]	Illinois	1.4	Freeman United Coal Co.
53.	Sentinel	West Virginia	1.4	Sentinel Division (ICG)
54.	Paradise	Kentucky	1.3	KenAmerican Resources, Inc. (Murray)
55.	Emery	Utah	1.2	CONSOL Energy Inc.
56.	Excel [2/]	Kentucky	1.1	Excel Mining, LLC (Alliance)
57.	Logansport	Pennsylvania	1.0	Rosebud Mining Co.

Notes: Figures are rounded. 2009 data compiled from 2010 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, 2009 preliminary data.
[2/] Includes Mine #1 and Van Lear.

TABLE 3

Major U.S. Surface Coal Mines - 2009
(Million Short Tons)

	Mine Name	Location	Tonnage	Operating Company
1.	North Antelope	Wyoming	98.3	Peabody Energy Subsidiary
2.	Black Thunder	Wyoming	81.2	Arch Coal, Inc.
3.	Cordero Rojo	Wyoming	39.3	Cloud Peak Energy
4.	Antelope	Wyoming	34.0	Cloud Peak Energy
5.	Jacobs Ranch	Wyoming	29.0	Arch Coal, Inc.
6.	Belle Ayr	Wyoming	28.7	Alpha Coal West
7.	Buckskin	Wyoming	25.4	Buckskin Mining Co. (Kiewit)
8.	Caballo	Wyoming	23.3	Peabody Energy Subsidiary
9.	Eagle Butte	Wyoming	21.5	Alpha Coal West
10.	Spring Creek	Montana	17.7	Cloud Peak Energy
11.	Rawhide	Wyoming	15.8	Peabody Energy Subsidiary
12.	Freedom	North Dakota	15.0	Coteau Properties Co. (North American)
13.	Martin Lake	Texas	10.4	Luminant Mining
14.	Rosebud	Montana	10.3	Western Energy Co. (Westmoreland)
15.	Coal Creek	Wyoming	9.8	Arch Coal, Inc.
16.	Navajo	New Mexico	9.2	BHP Billiton-New Mexico Coal
17.	Falkirk	North Dakota	8.1	The Falkirk Mining Co. (North American)
18.	Kayenta	Arizona	7.5	Peabody Energy Subsidiary
19.	Wyodak	Wyoming	6.0	Wyodak Resources Dev. Corp. (Black Hills)
20.	Absaloka	Montana	5.9	Westmoreland Resources Inc.
21.	El Segundo	New Mexico	5.4	Peabody Energy Subsidiary
22.	Dry Fork	Wyoming	5.2	Western Fuels-Wyoming
23.	Jewett	Texas	5.1	Texas Westmoreland Coal Co.
24.	Twilight	West Virginia	5.0	Progress Coal Co. (Massey)
25.	Three Oaks	Texas	4.9	Luminant Mining
26.	Decker	Montana	4.5	Decker Coal Co. (Kiewit / Cloud Peak)
27.	Kemmerer	Wyoming	4.4	Chevron Mining Inc.
28.	Center	North Dakota	4.2	BNI Coal, Ltd.
29.	Black Butte	Wyoming	4.1	Black Butte Coal Co. (Kiewit)
30.	Sabine	Texas	3.8	Sabine Mining (North American)
31.	Colowyo [1/]	Colorado	3.6	Rio Tinto Energy America
32.	Farmersburg	Indiana	3.6	Peabody Energy Subsidiary
33.	Somerville Central	Indiana	3.4	Peabody Energy Subsidiary
34.	Red Hills	Mississippi	3.4	Mississippi Lignite (North American)
35.	Big Brown	Texas	3.3	Luminant Mining
36.	San Miguel	Texas	3.2	San Miguel Lignite (North American)
37.	Dolet Hills Lignite	Louisiana	3.0	Dolet Hills Lignite Co. (AEP)
38.	Monticello	Texas	2.8	Luminant Mining
39.	Frasure Creek No. 6 [1/]	Kentucky	2.8	Trinity Coal Corp./Woodring
40.	Black Castle	West Virginia	2.7	Black Castle Mining Co. (Massey)
41.	McKinley	New Mexico	2.7	Chevron Mining Inc.
42.	Republic	West Virginia	2.7	Republic Energy Co. (Massey)
43.	Coal-Mac	West Virginia	2.6	Arch Coal, Inc.
44.	Beulah	North Dakota	2.6	Dakota Westmoreland Corp.
45.	Birch River	West Virginia	2.5	ICG Eastern, LLC
46.	Bridger	Wyoming	2.2	Bridger Coal Co. (Interwest)
47.	Lee Ranch	New Mexico	2.1	Peabody Energy Subsidiary
48.	Trapper	Colorado	2.1	Trapper Mining Inc.
49.	Cottage Grove	Indiana	2.1	Peabody Energy Subsidiary
50.	Miller Creek	Indiana	2.0	Peabody Energy Subsidiary
51.	Somerville North	Indiana	2.0	Peabody Energy Subsidiary

Notes: Figures are rounded. 2009 data compiled from a 2010 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, 2009 preliminary data.

TABLE 4
Major Multi-Mine Production Complexes - 2009
(Million Short Tons)

	Complex Name	Location	Tonnage	Company
1.	Somerville Complex	Indiana	7.1	Peabody Energy Subsidiary
2.	American Coal (Galatia Complex)	Illinois	6.3	The American Coal Company (Murray)
3.	Progress Coal Company	West Virginia	5.0	Massey Energy Co.
4.	ICG Hazard	Kentucky	3.7	ICG Hazard, LLC
5.	Corridor G	West Virginia	3.6	Patriot Coal Corp.
6.	Sidney Coal Company	Kentucky	3.4	Massey Energy Co.
7.	Republic Energy	West Virginia	3.4	Massey Energy Co.
8.	Premier Elkhorn	Kentucky	3.2	Premier Elkhorn Coal Co. (TECO)
9.	Miller Creek	West Virginia	3.2	CONSOL of Kentucky
10.	Triad	Indiana	3.1	Triad Mining, Inc. (James River)
11.	Perry County	Kentucky	3.1	Perry County Coal Corp. (TECO)
12.	Marfork Coal Company	West Virginia	3.0	Massey Energy Co.
13.	Fola Complex	West Virginia	3.0	Fola Coal Co. (CONSOL)
14.	Rocksprings Preparation Plant	West Virginia	3.0	Rocksprings (Alpha)
15.	Coal-Mac	West Virginia	2.9	Arch Coal, Inc.
16.	Wildcat Hills	Illinois	2.8	Peabody Energy Subsidiary
17.	Black Castle	Kentucky	2.7	Massey Energy Co.
18.	Logan County	West Virginia	2.6	Patriot Coal Corp.
19.	Blue Grass	Kentucky	2.5	Patriot Coal Corp.
20.	Nicholas Energy (Alex)	West Virginia	2.2	Massey Energy Co.
21.	Lone Mountain	Kentucky	2.2	Arch Coal, Inc.
22.	Erbacon Preparation Plant	West Virginia	2.2	Brooks Run Mining Company, LLC (Alpha)
23.	CAM Mining	Kentucky	2.1	CAM Holdings, LLC
24.	Paint Creek	West Virginia	2.1	Patriot Coal Corp.
25.	Clintwood	Kentucky & Virginia	2.1	Clintwood Elkhorn Mining (TECO)
26.	Elk Run Coal Company	West Virginia	2.0	Massey Energy Co.
27.	Toms Creek Preparation Plant	Virginia	2.0	Paramount Coal Company Virginia, LLC (Alpha)
28.	Kanawha Eagle	West Virginia	1.9	Patriot Coal Corp.
29.	Blue Diamond	Kentucky	1.7	Blue Diamond Coal Co. (James River)
30.	Mammoth	West Virginia	1.7	Massey Energy Co.
31.	Cumberland River	Virginia	1.6	Arch Coal, Inc.
32.	McCoy	Kentucky	1.6	McCoy Elkhorn Coal Corp. (James River)
33.	Rocklick Business Unit	West Virginia	1.5	Patriot Coal Corp.
34.	Bledsoe	Kentucky	1.5	Bledsoe Coal Corporation (James River)
35.	Independence Coal Company	West Virginia	1.5	Massey Energy Co.
36.	Edwight Mining	West Virginia	1.5	Massey Energy Co.
37.	CAM Ohio (Hopedale)	Ohio	1.5	CAM Holdings, LLC
38.	McClure Preparation Plant	Virginia	1.4	Dickenson Russell Coal Company, LLC (Alpha)
39.	Cannelburg	Indiana	1.4	Solar Sources, Inc.
40.	Sentinel	West Virginia	1.4	Sentinel Division (ICG)
41.	Kepler Preparation Plant	West Virginia	1.3	Riverside Mining (Alpha)
42.	Leeco	Kentucky	1.3	Leeco, Inc. (James River)
43.	Moss 3 Preparation Plant	Virginia	1.2	Dickenson Russell Coal Company, LLC (Alpha)
44.	Performance	West Virginia	1.2	Massey Energy Co.
45.	Roxana Preparation Plant	Kentucky	1.2	Enterprise Mining Company, LLC (Alpha)
46.	Jones Fork Complex	Kentucky	1.1	CONSOL of Kentucky
47.	Rum Creek	West Virginia	1.1	Massey Energy Co.
48.	Aracoma	West Virginia	1.1	Massey Energy Co.
49.	Shamrock	Indiana	1.1	Solar Sources, Inc.
50.	Campbell's Creek	West Virginia	1.0	Patriot Coal Corp.

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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 facility that processes production from more than one mine.

TABLE 5

Major Holders of U.S. Coal Reserves - 2009
(Billion Short Tons)

	Holder	Estimated Reserves
1.	U.S. Government	88.000 *
2.	Great Northern Properties Limited Partnership	20.000
3.	Peabody Energy Corporation	7.900
4.	Arch Coal, Inc.	3.900
5.	Massey Energy Company	2.400
6.	The North American Coal Corporation	2.300
7.	Alpha Natural Resources (includes Foundation)	2.300
8.	Natural Resource Partners LP	2.100
9.	CONSOL Energy Inc. [1/]	1.841
10.	Patriot Coal Corp.	1.840
11.	Pocahontas Land Corporation (Norfolk Southern)	1.710
12.	International Coal Group (ICG)	1.100
13.	Cloud Peak Energy, Inc.	1.000
14.	Murray Energy Corporation	0.869
15.	Luminant Mining (Energy Future Holdings)	0.843
16.	Penn Virginia Resource Partners, LP	0.829
17.	Usibelli Coal Mine, Inc.	0.700
18.	Alliance Resources Partners	0.647
19.	BNI Coal, LTD	0.600
20.	Kentucky River Properties LLC	0.549
21.	Kiewit Mining Group, Inc.	0.466
22.	Rosebud Mining Company	0.450
23.	Westmoreland Coal Company [2/]	0.398
24.	Western Fuels Association, Inc.	0.346
25.	CAM Holdings LLC (Rhino Energy LLC/Wexford)	0.297
26.	Black Hills Corporation (Wyodak Resources Dev.)	0.294
27.	TECO Coal Corporation	0.270
28.	BHP Billiton	0.256
29.	James River Coal Company	0.231
30.	Interwest Mining Company (PacifiCorp)	0.215
31.	Chevron Mining Inc.	0.193
32.	Dolet Hills Lignite Company (AEP)	0.190
33.	United Coal Company	0.175
34.	Jim Walter Resources, Inc.	0.152
35.	Vectren Fuels, Inc.	0.136
36.	Western Pocahontas Properties	0.122
37.	Jewell Smokeless Coal Corp. (Sunoco)	0.100
38.	Drummond Company, Inc.	0.078
39.	National Coal Corporation	0.040
40.	Solar Sources Inc.	0.027
41.	Trapper Mining Inc.	0.025
42.	Argus Energy WV, LLC	N/A
43.	Freeman Energy Corporation	N/A
44.	Cliffs North American Coal	N/A
45.	Oxbow Carbon & Minerals Inc.	N/A
46.	Oxford Mining Co.	N/A
47.	Cumberland Resources Corp.	N/A
48.	Trinity Coal Company	N/A

Notes: 2009 data compiled from 2010 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 263 billion short tons (Energy Information Administration, 2008).
[1/] 4.5 billion tons including unassigned and assigned non-operating reserves. [2/] Proven Reserves
N/A = Not Available.