



*COAL PRODUCER AND  
RESERVE HOLDER  
REPORT 2020*



# NATIONAL MINING ASSOCIATION COAL PRODUCER AND RESERVE HOLDER REPORT 2020

June 2021

## The U.S. Coal Industry, 2020

For many decades, coal has provided the U.S. with abundant reliable and affordable energy, with the majority (currently 90%) of production going to the electric power sector. Although coal demand has decreased in recent years, coal is still a critical fuel source for a diversified electricity market. Despite the challenges of COVID-19, the coal industry continued its role as a dependable fuel source for its customers in 2020. And fortunately, like other industries, coal is experiencing significant market improvement this year as the U.S. and global economies continue to re-open.

U.S. coal production was 534 million short tons in 2020, down 24%, with a 30% decrease in the East and a 21% decrease in the West. Coal consumption by the power sector, coal’s largest market, decreased 19% to nearly 437 million tons. Coal exports, down 26%, totaled 69 million tons - 27 million tons of steam coal and 42 million tons of metallurgical coal.

The Energy Information Administration (EIA) May 2021 Short-term Outlook is forecasting coal production to increase 8% this year to 582 million tons. Power sector coal consumption is expected to increase nearly 19% to 519 million tons, and coal exports should increase 11% to 77 million tons.

This report highlights some key coal market indicators, information on major sales and restructuring activity in 2020 and through May 2021. Tables 1-4 include company and mine level production and company reserves for a number of major producers.

**Coal Supply & Demand - Figure 1**

<b>U.S. Coal Overview - 2020</b> (Million Short Tons)	
Coal Production	534.3
Coal Consumption	477.3
Coal Exports	69.1
Coal Imports	5.1

**Coal Exports - Figure 2**

<b>U.S. Coal Exports - 2020</b> (Million Short Tons)	
Steam Coal	27.0
Metallurgical Coal	42.1
Total	69.1

Source: EIA Monthly Energy Review, May 2021    Source: EIA Quarterly Coal Report, December 2020

**Domestic Coal Consumption - Figure 3**

U.S. Domestic Coal Consumption by Sector - 2020 (Million Short Tons)	
Coal Consumption:	
Power Sector	436.5
Coke Plants	14.4
Other Industrial & Commercial	26.4
Total	477.3

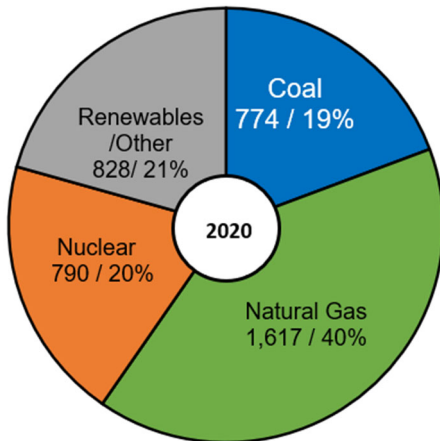
Source: EIA Monthly Energy Review, May 2021

**EIA's Coal Outlook for 2021 - Figure 4**

EIA Coal Outlook - 2021 (Million Short Tons)	
Coal Production	582.1
Coal Consumption:	
Power Sector	518.9
Other	40.9
Total	559.8
Coal Exports	77
Coal Imports	4.5

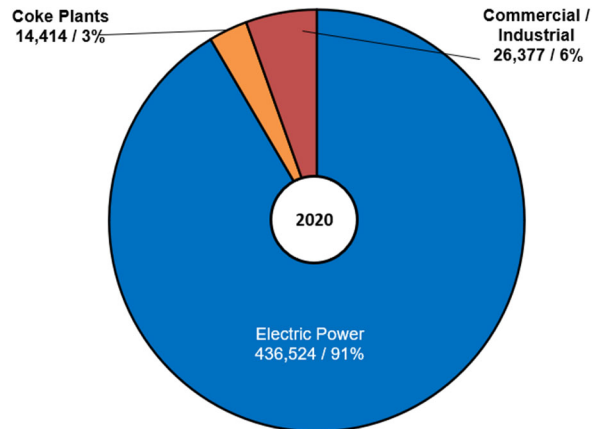
Source: EIA Short-term Energy Outlook, May 2021

**Power Sector Generation by Fuel Source and Share (Billion KWH) – Figure 5**



Source: EIA, Electric Power Monthly, February 2021; Monthly Energy Review, May 2021

**Domestic Markets by Sector – Figure 6**



**2020's Recent Asset Acquisitions, Sales and Restructuring Activity for Selected Companies – as of May 2021**

U.S. coal company sales, acquisitions and restructuring activities that have occurred in recent months are identified below. This list is based on publicly available information and news reports and may not include all activity, particularly where smaller companies are involved.

**American Resources Corp.** In February and March 2020, American Resources restructured Cambrian Holding Company's Perry County Resources (PCR) and sold some of its non-core mine permits.

**ArcelorMittal USA LLC.** In December 2020, Cleveland-Cliffs Inc. acquired substantially all of the U.S. steel-making operations of ArcelorMittal including the Princeton, W.Va. mine assets.

**Arch Resources, Inc.** Arch changed its name from Arch Coal, Inc. to Arch Resources, Inc. in May 2020. In February 2021, Arch transferred the Viper thermal coal mine to Knight Hawk Coal.

**Blackhawk Mining, LLC** In June 2020, Blackhawk was acquired by Czech Republic company, Sev.en Energy.

**Cleveland-Cliffs Inc.** As mentioned above (see ArcelorMittal), in December 2020, Cliffs acquired the mining operations of ArcelorMittal.

**Contura Energy, Inc.** Contura completed the transfer of mining permits to FM Coal in June 2020. Contura Energy sold its Pennsylvania assets (Cumberland and Emerald mines) to Iron Senergy Holding in December 2020. In February 2021, Contura changed its name to Alpha Metallurgical Resources, Inc.

**Eagle Specialty Materials (ESM).** ESM was listed as a bidder for some Rhino Resources assets (see Rhino).

**FM Coal LLC.** FM Coal (an affiliate of Eagle Specialty Materials) filed for Chapter 11 bankruptcy protection in September 2020.

**Foresight Energy LP.** Foresight filed for Chapter 11 bankruptcy protection in March 2020 and exited in late June 2020.

**Iron Senergy Holding LLC.** Iron Senergy acquired Contura's Cumberland and Emerald mines and the associated coal reserves, mining permits and operations, infrastructure, equipment and transloading facilities in December 2020.

**Knight Hawk Coal.** Knight Hawk assumed ownership of Arch Resources' Viper mine in February 2021 (see Arch Resources).

**Lighthouse Resources Inc.** Lighthouse filed for Chapter 11 restructuring in December 2020, and also shed its Millennium coal export terminal assets in December 2020.

**Murray Energy Corp.** In September 2020, Murray completed Chapter 11 (October 2019 filing), emerging as American Consolidated Natural Resources (ACNR). Murray Metallurgical Coal Holdings completed the sale of the Oak Grove mine to a group of its former creditors including ACNR in December 2020 under the name Hatfield Metallurgical Holdings, LLC.

**Paringa Resources.** Paringa's U.S. operations (Hartshorne Mining) filed for bankruptcy protection in February 2020 and planned to liquidate its remaining U.S. assets.

**Pocahontas Royalties LLC.** The recently formed company in February 2020 completed the acquisition of a private company that owns approximately one million acres of mineral reserves and leases coal reserves to coal mine operators in Central Appalachia.

**Rhino Resource Partners LP.** Rhino filed for Chapter 11 bankruptcy protection in July 2020. Rhino auctioned most of its assets in September 2020 to a large group of buyers including Pledge Servicing Partners, C.O.P Coal Development, Mountaineer Metallurgical Holdings, Ceres Consulting, Eagle Specialty Materials and Carter Roag.

**Sev.en Energy.** Sev.en secured a 17.1% interest in Corsa Coal Corp. in May 2020 and acquired Blackhawk Mining's coal assets in June 2020.

**White Stallion Energy LLC.** White Stallion filed for Chapter 11 bankruptcy protection in December 2020.

Sources: Publicly available trade press, company news releases and annual reports of various coal companies. This list may not include all activity, particularly where smaller companies are involved.

## Major Coal Producing Companies and Mines in 2020 (Tables 1-3)

Table 1, compiled by the National Mining Association (NMA) from preliminary data collected by the U.S. Mine Safety & Health Administration for 2020 and government data, shows 2020 production for 39 U.S. coal producing companies. Peabody was the largest coal producer in the U.S., with production of 104.8 million tons, which represented 19.6% of total U.S. coal production. The second largest was Arch Resources, with 62.5 million tons, representing 11.7% of coal production. Ranking third was Navajo Transitional Energy, with 39.1 million tons and 7.3% of production. The fourth largest coal producer was American Consolidated Natural Resources, with 32.6 million tons and 6.1% of production. The fifth largest producer was North American Coal Corporation, with 31.1 million tons and 5.7% of production. The top five coal producing companies in the survey accounted for nearly 51% of total U.S. production, while the top 10 accounted for nearly 70%.

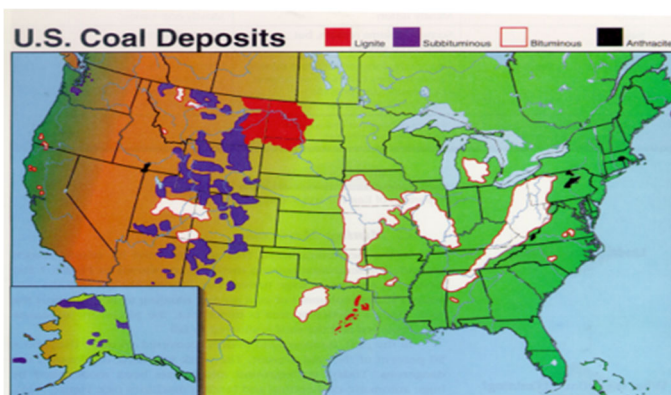
Table 2 lists the top underground mines in terms of production. The top five mines were Alliance Resource Partners' River View mine in Kentucky with 9.4 million tons; American Consolidated Resources' Marshall County mine in West Virginia, with 8.9 million tons; CONSOL Energy's Bailey mine in Pennsylvania, with 8.7 million tons; Foresight Energy's M Class Number 1 mine in Illinois, with 7.2 million tons; and Alliance Resource Partners' Tunnel Ridge mine in West Virginia, with 6.8 million tons.

The five top producing surface mines (Table 3) in 2020 were Peabody's North Antelope Rochelle mine, with 66.1 million tons; Arch Resources' Black Thunder mine, with 50.2 million tons; Navajo Transitional Energy's Antelope mine, with 19.8 million tons; North American's Freedom mine, with 12.6 million tons; and Eagle Specialty Materials' Eagle Butte mine, with 12.3 million tons.

## Major U.S. Coal Reserve Holders in 2020 (Table 4)

The U.S. government is the single largest reserve holder, with about one-third ownership of the nation's coal resources – or approximately 84 billion tons of estimated recoverable coal reserves. Great Northern Properties Limited Partnership was the second largest reserve holder with 21 billion tons. Third was Peabody with 2.6 billion tons, and fourth and fifth were CONSOL Energy and American Consolidated Resources, both with about 2.2 billion tons.

## Map of U.S. Coal Deposits by Coal Type – Figure 7



**TABLE 1**  
**Major U.S. Coal Producers - 2020**  
**(Million Short Tons)**

<b>Company</b>	<b>Production 1/ Tonnage</b>	<b>Percent of Total U.S.</b>
1. Peabody	104.8	19.6%
2. Arch Resources, Inc. (formerly Arch Coal)	62.5	11.7%
3. Navajo Transitional Energy Co. LLC (NTEC)	39.1	7.3%
4. American Consolidated Natural Resources, Inc. (ACNR) (formerly Murray)	32.6	6.1%
5. North American Coal Corporation (NACCO)	31.1	5.8%
6. Alliance Resource Partners, LP	26.9	5.0%
7. Eagle Specialty Materials LLC	23.5	4.4%
8. Alpha Metallurgical Resources, Inc. (formerly Contura)	19.5	3.6%
9. CONSOL Energy, Inc.	18.8	3.5%
10. Foresight Energy LP/ACNR	14.2	2.7%
11. Luminant Mining Company (Vistra Energy Corp.)	13.1	2.4%
12. Kiewit Mining Group, Inc.	10.5	2.0%
13. Westmoreland Mining, LLC	9.4	1.8%
14. Wolverine Fuels LLC	8.1	1.5%
15. Sev.en Energy AG (formerly Blackhawk)	7.6	1.4%
16. Prairie State Energy Company	6.4	1.2%
17. Warrior Met Coal, Inc.	6.1	1.1%
18. Signal Peak Energy, LLC (Global Mining Group/Boich/FirstEnergy/Gunvor)	6.0	1.1%
19. Sunrise Coal Company (Hallador)	5.6	1.1%
20. Iron Senergy Holdings, LLC	5.6	1.0%
21. Coronado Coal LLC	5.5	1.0%
22. Lighthouse Resources Inc.	5.4	1.0%
23. Rosebud Mining Company (J. Clifford Forrest)	4.8	0.9%
24. Knight Hawk Coal, LLC/Arch Resources Inc.	4.2	0.8%
25. BNI Coal, LTD (Allete)	4.2	0.8%
26. Western Fuels Association	3.9	0.7%
27. Interwest Mining Company (PacifiCorp/Bridger)	3.9	0.7%
28. Black Hills Corporation (Wyodak Resources)	3.7	0.7%
29. White Stallion Energy (formerly Vigo Coal & Solar Sources)	3.1	0.6%
30. Metinvest B.V. (United Coal Co.)	2.6	0.5%
31. Trapper Mining Inc. (Salt River; Tri-State; Pacificorp; Platte River)	2.0	0.4%
32. Blue Mountain Energy, Inc. (Deseret Power)	1.9	0.4%
33. Colowyo Coal Co. LP (Tri-State Generating)	1.7	0.3%
34. Ramaco Resources, Inc.	1.7	0.3%
35. Cleveland Cliffs Inc.	1.6	0.3%
36. Corsa Coal Co. (Quintana)	1.2	0.2%
37. Rhino Energy LLC	1.1	0.2%
38. Usibelli Coal Mine, Inc.	1.0	0.2%
39. Dolet Hills Lignite Company (AEP)	0.5	0.1%
Other Producers	28.8	5.4%
<b>Total U.S. Production 2/</b>	<b>534.3</b>	<b>100.0%</b>

Notes: Figures are rounded. 2020 data compiled from MSHA 2020 preliminary production data. May not be all-inclusive.

1/ U.S. Department of Labor, Mine Safety & Health Administration, 2020 preliminary data.

2/ U.S. Department of Energy, Energy Information Administration, 2020 preliminary data.

**TABLE 2**  
**Major U.S. Underground Coal Mines - 2020 <sup>1/</sup>**  
**(Million Short Tons)**

<b>Mine Name</b>	<b>Location</b>	<b>Tonnage</b>	<b>Operating Company</b>
1. River View	Kentucky	9.4	River View Coal, LLC (Alliance)
2. Marshall County	West Virginia	8.9	Marshall County Coal Co. (ACNR)
3. Bailey	Pennsylvania	8.7	CONSOL Pennsylvania Coal Co.
4. M Class No. 1	Illinois	7.2	M Class Mining LLC (Foresight/ACNR)
5. Tunnel Ridge	West Virginia	6.8	Tunnel Ridge, LLC (Alliance)
6. Lively Grove	Illinois	6.4	Prairie State Generating Co.
7. Bull Mountain	Montana	6.0	Signal Peak Energy LLC (Boich/FirstEnergy/Gunvor)
8. Enlow Fork	Pennsylvania	5.7	CONSOL Pennsylvania Coal Co.
9. Cumberland	Pennsylvania	5.6	Iron Senergy Holding, LLC
10. Ohio County	West Virginia	5.0	Ohio County Coal Co. (ACNR)
11. Harrison County	West Virginia	4.9	Harrison County Coal Co. (ACNR)
12. No. 7	Alabama	4.5	Warrior Met Coal Mining, LLC
13. Sufco	Utah	4.5	Canyon Fuel Co., LLC (Wolverine Fuels)
14. Harvey	Pennsylvania	4.4	CONSOL Pennsylvania Coal Co.
15. Leer	West Virginia	4.2	ACI Tygart Valley (Arch)
16. Marion County	West Virginia	3.9	Marion County Coal Co. (ACNR)
17. Mach No. 1	Illinois	3.8	Mach Mining LLC (Foresight/ACNR)
18. Prairie Eagle Underground	Illinois	3.8	Knight Hawk Coal, LLC (Bunn)
19. Buchanan	Virginia	3.8	Coronado Coal, LLC
20. Skyline	Utah	3.7	Canyon Fuel Co., LLC (Wolverine Fuels)
21. Warrior (Cardinal)	Kentucky	3.6	Warrior Coal, LLC (Alliance)
22. Oaktown Fuels No. 1	Indiana	3.4	Sunrise Coal Co. (Hallador)
23. Lila Canyon	Utah	3.3	UtahAmerican Energy, Inc. (ACNR)
24. Deer Run	Illinois	2.9	Patton Mining LLC (Cline Group)
25. Hamilton County No. 1	Illinois	2.6	Hamilton County Coal (Alliance)
26. West Elk	Colorado	2.5	Mountain Coal Co. (Arch)
27. Bridger Underground	Wyoming	2.4	Bridger Coal Company (Interwest/Pacificorp)
28. Monongalia County	West Virginia	2.3	Monongalia County Coal Co. (ACNR)
29. Gibson South	Indiana	2.2	Gibson County Coal, LLC (Alliance)
30. Pride	Kentucky	2.1	Muhlenberg County Coal Co. (ACNR)
31. Deep Mine #41	Virginia	2.1	Paramont Contura, LLC (Alpha Metallurgical Resources)
32. Deserado	Colorado	1.9	Blue Mountain Energy, Inc. (Deseret Power)
33. Mettiki (Mountain View)	West Virginia	1.8	Mettiki Coal LLC (Alliance)
34. Gateway North	Illinois	1.8	Peabody
35. Oaktown Fuels No. 2	Indiana	1.8	Sunrise Coal Co. (Hallador)
36. Century	Ohio	1.7	American Energy Corp. (ACNR)
37. No. 4	Alabama	1.6	Warrior Met Coal Mining, LLC
38. Oak Grove	Alabama	1.6	Murray Oak Grove Coal LLC
39. Francisco	Indiana	1.6	Peabody
40. Slabcamp Stockton	West Virginia	1.3	Mammoth Coal Co. (Alpha Metallurgical Resources)
41. San Juan	New Mexico	1.2	Westmoreland San Juan Mining LLC
42. Twentymile (Foidel Creek)	Colorado	1.2	Peabody
43. Beckley	West Virginia	1.0	ICG Beckley (Arch)

<sup>1/</sup> U.S. Department of Labor, Mine Safety & Health Administration, 2020 preliminary data.

**TABLE 3**

**Major U.S. Surface Coal Mines - 2020 <sup>1/</sup>**  
**(Million Short Tons)**

<b>Mine Name</b>	<b>Location</b>	<b>Tonnage</b>	<b>Operating Company</b>
1. North Antelope Rochelle	Wyoming	66.1	Peabody
2. Black Thunder	Wyoming	50.2	Arch Resources, Inc.
3. Antelope	Wyoming	19.8	Navajo Transitional Energy Co. LLC
4. Freedom	North Dakota	12.6	Coteau Properties Co. (North American)
5. Eagle Butte	Wyoming	12.3	Eagle Specialty Materials
6. Caballo	Wyoming	11.6	Peabody
7. Belle Ayr	Wyoming	11.2	Eagle Specialty Materials
8. Kosse	Texas	10.1	Luminant Mining
9. Cordero Rojo	Wyoming	9.8	Navajo Transitional Energy Co. LLC
10. Buckskin	Wyoming	9.7	Buckskin Mining Co. (Kiewit)
11. Spring Creek	Montana	9.5	Navajo Transitional Energy Co. LLC
12. Rawhide	Wyoming	9.5	Peabody
13. Falkirk	North Dakota	7.3	The Falkirk Mining Co. (North American)
14. Colstrip (Rosebud)	Montana	5.3	Western Energy Co. (Westmoreland)
15. Bear Run	Indiana	5.2	Peabody
16. El Segundo	New Mexico	4.6	Peabody
17. Navajo	New Mexico	4.4	Navajo Transitional Energy Co. LLC
18. Center	North Dakota	4.2	BNI Coal, Ltd. (Allete)
19. Dry Fork	Wyoming	3.9	Western Fuels-Wyoming, Inc.
20. Wyodak	Wyoming	3.7	Wyodak Resources Dev. Corp. (Black Hills)
21. Decker	Montana	3.2	Lighthouse Resources
22. Liberty/Martin Lake	Texas	3.0	Luminant Mining
23. Red Hills	Mississippi	2.6	Mississippi Lignite (North American)
24. Kemmerer	Wyoming	2.5	Kemmerer Holdings, LLC (Westmoreland)
25. Black Butte <sup>2/</sup>	Wyoming	2.2	Black Butte Coal Co. (Lighthouse/Anadarko)
26. Coal Creek	Wyoming	2.1	Arch Resources, Inc.
27. Wild Boar	Indiana	2.1	Peabody
28. Absaloka	Montana	2.1	Westmoreland Resources Inc.
29. Trapper	Colorado	2.0	Trapper Mining Inc.
30. Coyote Creek	North Dakota	2.0	Coyote Creek Mining Co. (North American)
31. Calvert/Walnut Creek Lignite <sup>3/</sup>	Texas	2.0	Kiewit Mining Group
32. San Miguel <sup>3/</sup>	Texas	1.9	Kiewit Mining Group
33. South Hallsville	Texas	1.6	Sabine Mining (North American)
34. Bridger Surface	Wyoming	1.4	Bridger Coal Co. (Interwest/Pacificorp)
35. Coal-Mac	West Virginia	1.4	Condor Holdings LLC.

Notes: Figures are rounded. Data compiled from 2020 preliminary Mine Safety & Health Administration. May not be all-inclusive.

1/ U.S. Department of Labor, Mine Safety & Health Administration, 2020 preliminary data.

2/ Fifty percent ownership each.

3/ Mine managed and operated, but not owned by Kiewit.

**TABLE 4**  
**Major Holders of U.S. Coal Reserves - 2020**  
**(Billion Short Tons)**

Holder	Estimated Reserves
1. U.S. Government <sup>1/</sup>	84.000
2. Great Northern Properties Limited Partnership	21.000
3. Peabody <sup>2/</sup>	2.614
4. CONSOL Energy, Inc. <sup>2/</sup>	2.200
5. American Consolidated Natural Resources, Inc (ACNR) (formerly Murray)	2.167
6. Foresight Energy LP / ACNR	2.070
7. North American Coal Corporation (NACCO) <sup>2/</sup>	1.902
8. Natural Resource Partners LP	1.816
9. Western Pocahontas Properties	1.800
10. Alliance Resource Partners, LP <sup>2/</sup>	1.653
11. Pocahontas Land Corporation (Norfolk Southern)	1.640
12. Arch Resources, Inc. (formerly Arch Coal) <sup>2/</sup>	1.607
13. Kentucky River Properties LLC	0.975
14. Navajo Transitional Energy Co. LLC	0.945
15. Penn Virginia Resource Partners, LP	0.783
16. Eagle Specialty Materials LLC <sup>4/</sup>	0.780
17. Alpha Metallurgical Resources, Inc. (formerly Contura) <sup>2/</sup>	0.624
18. BNI Coal, LTD (Allele)	0.600
19. Coronado Coal LLC <sup>2/</sup>	0.481
20. Rosebud Mining Company (J. Clifford Forrest) <sup>2/</sup>	0.463
21. Usibelli Coal Mine, Inc. <sup>2/</sup>	0.450
22. Prairie State Energy Company <sup>2/</sup>	0.365
23. Luminant Mining Company (Vistra Energy Corp.) <sup>3/</sup>	0.281
24. Lighthouse Resources Inc. <sup>4/</sup>	0.281
25. Western Fuels Association <sup>2/</sup>	0.278
26. Westmoreland Mining, LLC	0.262
27. Ramaco Resources, Inc. <sup>2/</sup>	0.262
28. Dolet Hills Lignite Company (AEP) <sup>2/</sup>	0.258
29. Rhino Energy LLC <sup>2/</sup>	0.247
30. Kiewit Mining Group, Inc.	0.210
31. Warrior Met Coal, Inc. <sup>2/</sup>	0.208
32. Signal Peak Energy, LLC (Global Mining Group/Boich/FirstEnergy/Gunvor)	0.200
33. Black Hills Corporation (Wyodak Resources)	0.181
34. Wolverine Fuels LLC	0.176
35. Paringa Resources Ltd. (Hartshorne Mining)	0.136
36. Cleveland-Cliffs Inc. <sup>2/</sup>	0.116
37. Metinvest B.V. (United Coal Co.) <sup>2/</sup>	0.115
38. Drummond Company, Inc.	0.105
39. Sunrise Coal Company (Hallador) <sup>2/</sup>	0.081
40. Knight Hawk Coal, LLC/Arch Resources Inc.	0.080
41. Colowyo Coal Co. LP (Tri-State Generating) <sup>2/</sup>	0.070
42. Corsa Coal Co. (Quintana) <sup>2/</sup>	0.039
43. Interwest Mining Company (PacifiCorp)	0.025
44. Trapper Mining Inc. (Salt River; Tri-State; PacifiCorp; Platte River)	0.014
45. White Stallion Energy (formerly Vigo Coal & Solar Sources) <sup>2/</sup>	0.010
46. Sev.en Energy Group (Blackhawk)	N/A
47. Blue Mountain Energy, Inc. (Deseret Power)	N/A
48. Iron Senergy Holding, LLC	N/A

Notes: Data for 2020 were estimated from NMA's 2019 NMA survey of major producers and reserve holders, annual reports and company websites.

N/A = Not Available.

<sup>1/</sup> U.S. Government 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 252 billion short tons (Energy Information Adm.)

Reserves are estimated proven & probable. <sup>2/</sup> Company website, company annual reports and/or other public and private sources.

<sup>3/</sup> Active and under study lignite deposits. <sup>4/</sup> Assigned recoverable reserves.

National Mining Association  
101 Constitution Avenue, NW  
Suite 500 East  
Washington, D.C. 20001  
(202) 463-2600 | [www.nma.org](http://www.nma.org)