



JOGMEC's Efforts for Stable Coal Supply

~Towards Energy Security Amid the Changing Global Energy Landscape~

石炭の安定供給を支えるJOGMECの取組み
~変化する国際エネルギー情勢の下でのエネルギー安全保障に向けて~

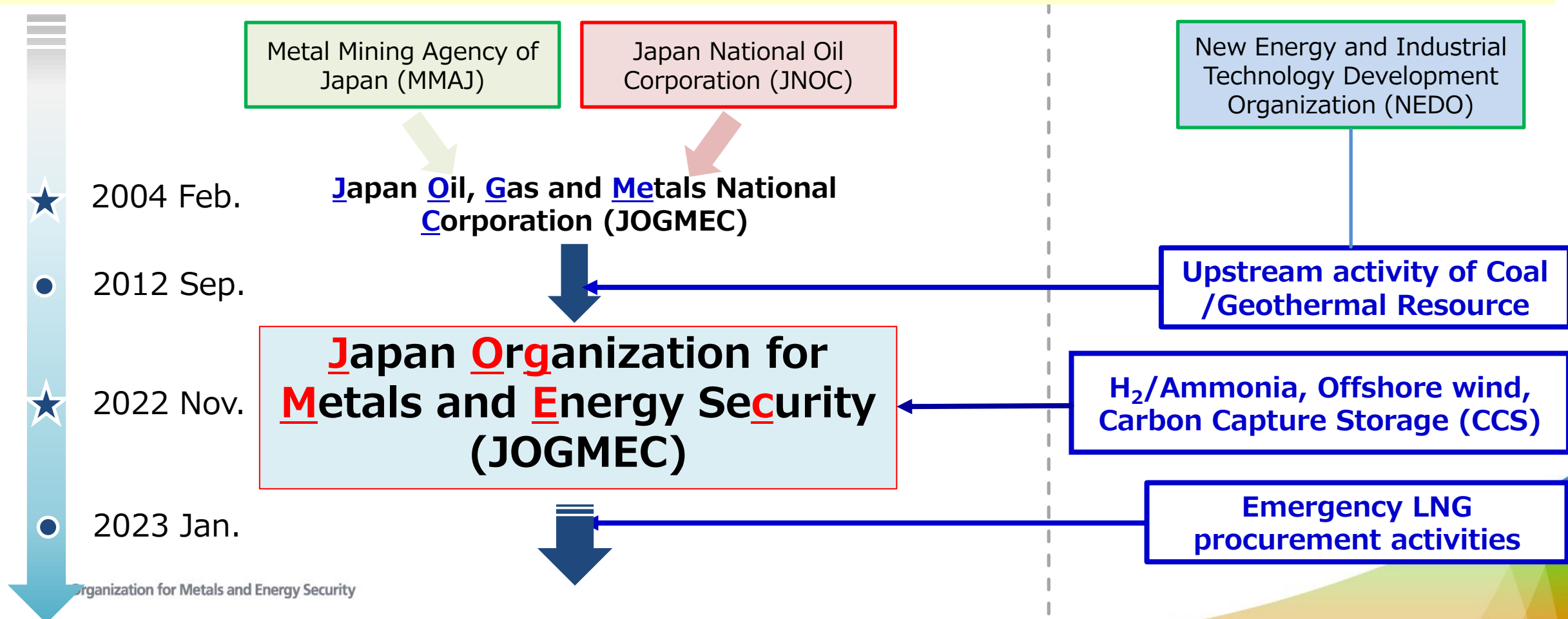
Japan Organization for Metals and Energy Security

KUBOTA Hiroshi, Executive Vice President

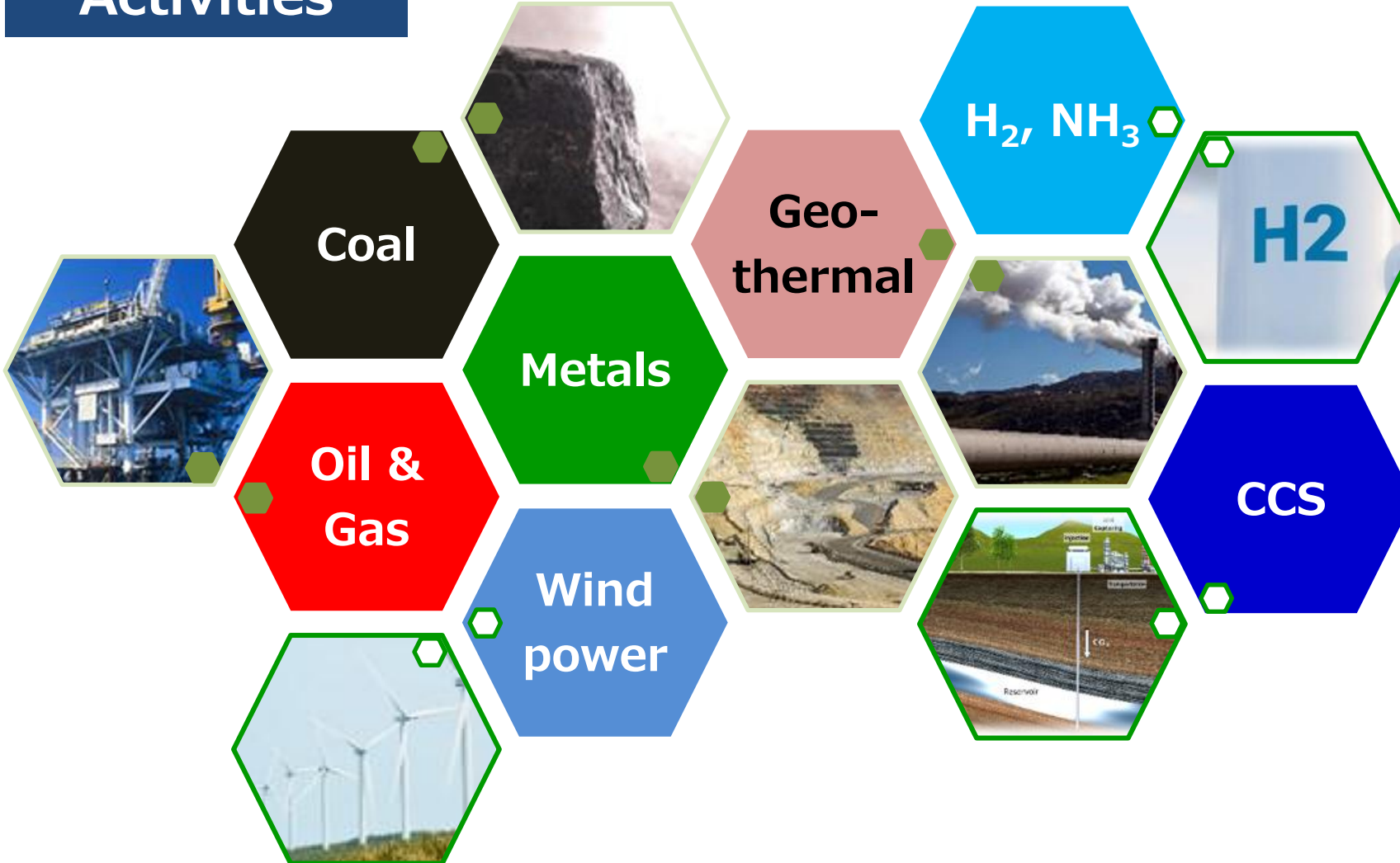
September 4th, 2026

History of JOGMEC

Mission: Governmental organization (1) to ensure stable supply of oil, gas, metals and coal resources to Japan, (2) to promote renewable energy development such as geothermal resources and offshore wind power plant inside Japan, (3) to promote CCS/CCUS project, and to promote production and storage of H₂/NH₃.



Activities



Support menu

- Geological surveys
- Marine resource development
- Financial assistance
- Technology development
- Stockpiling
- Environmental protection
- Collection and provision of information
- Strategic diplomacy and international cooperation

JOGMEC's Recent Activities for Supply-Chain

Diplomacy Activities for Critical Minerals



G7 leaders' declaration on securing supply chains for critical minerals

Stockpiling

Source: Prime Minister's Office of Japan

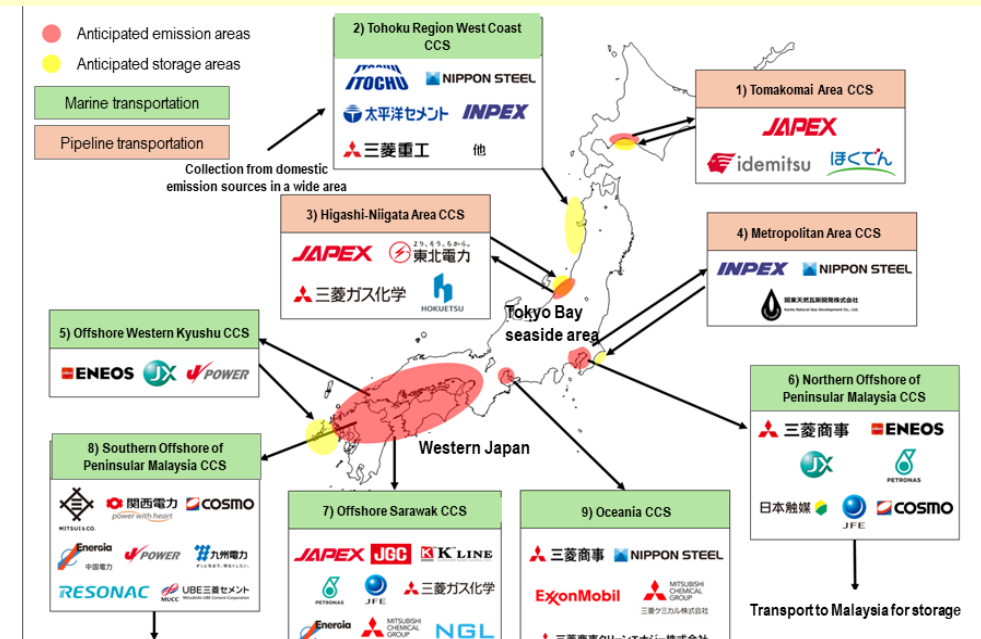
We acknowledge the essential role that stockpiling can play in improving the security of supply and stability of the market. We commit to developing and increasing domestic capacities for stockpiling critical minerals in the industrial or the public sector, where appropriate for our respective economies, trade and national and collective security including through existing initiatives. We concur to exchange information on stockpiling systems, best practices and methodologies and procurement and release mechanisms, particularly through the IEA Critical Minerals Security Program and by drawing on the expertise of relevant institutions and initiatives such as Japan Organization for Metals and Energy Security (JOGMEC). We intend to leverage stockpiling mechanisms to support the diversification of critical minerals supply chains, including in partner and emerging economies.

To facilitate supply crisis anticipation and management and to prevent price instability, we commit to establish a joint cooperation mechanism with the help of the IEA and its data environment. This mechanism would allow us to share, when necessary, with G7 members and like-minded countries data and alerts on future market stress or disruption in supply or demand.

Source: Ministry of Foreign Affairs of Japan



National Crude Oil Stockpile Releases

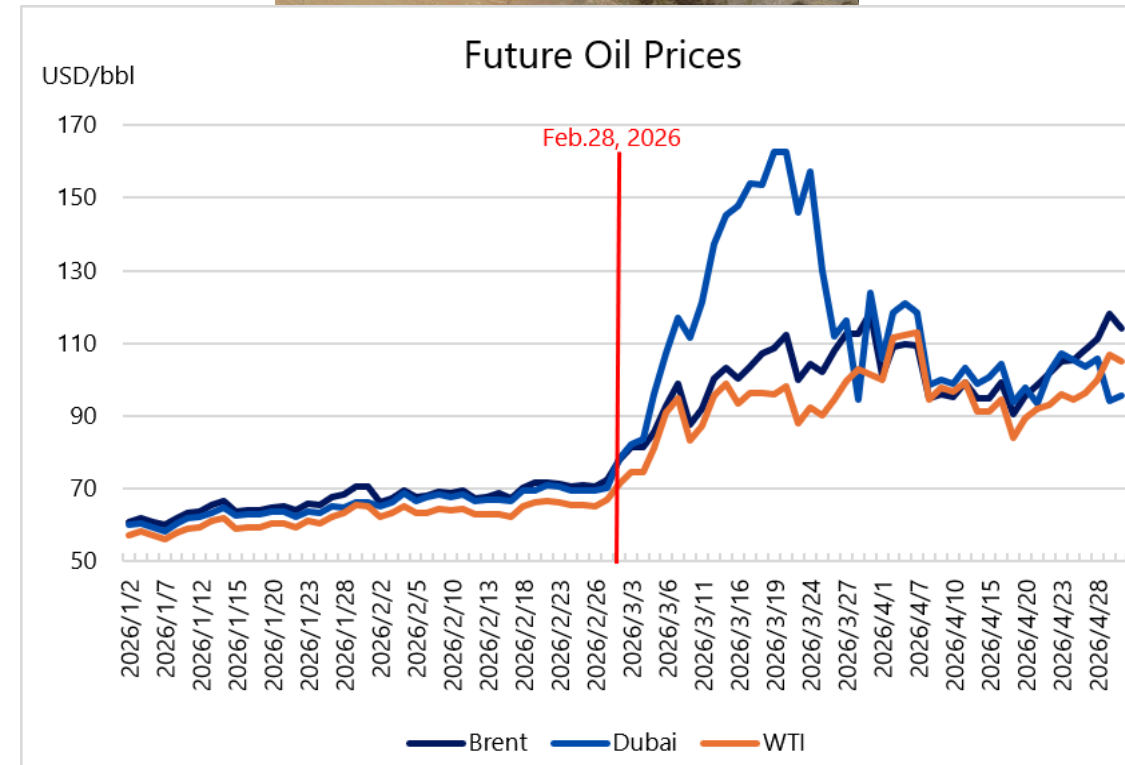
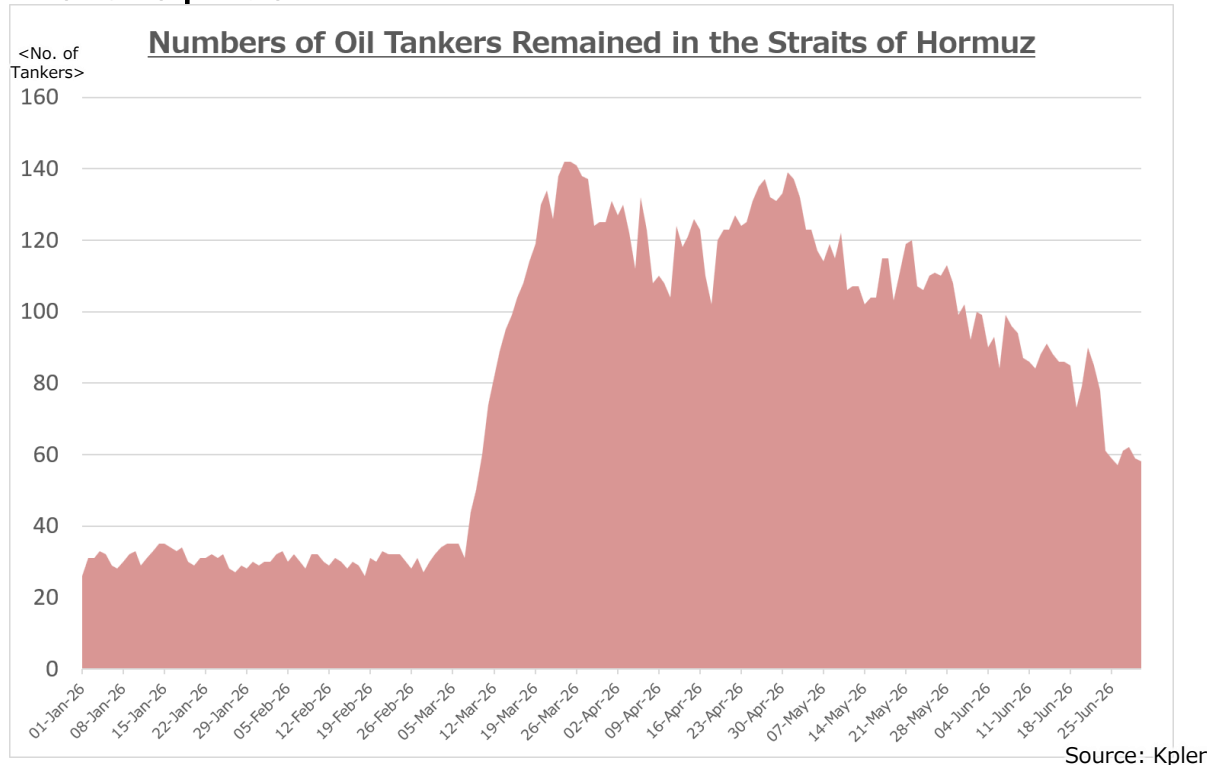


Advanced CCS Projects Start

Source: Ministry of Economy, Trade and Industry

Energy Crisis Caused by Escalating Tensions in the Middle East

- After US-Israel's attacked Iran, tensions surrounding the Strait of Hormuz escalated, causing disruptions in logistics, including oil and LNG shipments.
- Energy prices have risen, and overall prices have also surged.
- Petroleum products such as naphtha has been disrupted.



Changing Coal Flow in response to Middle East Situation

- **"Coal is comeback"** especially in South/SE Asia because of LNG supply depletion
- Restart/Extension of Coal Power Plant

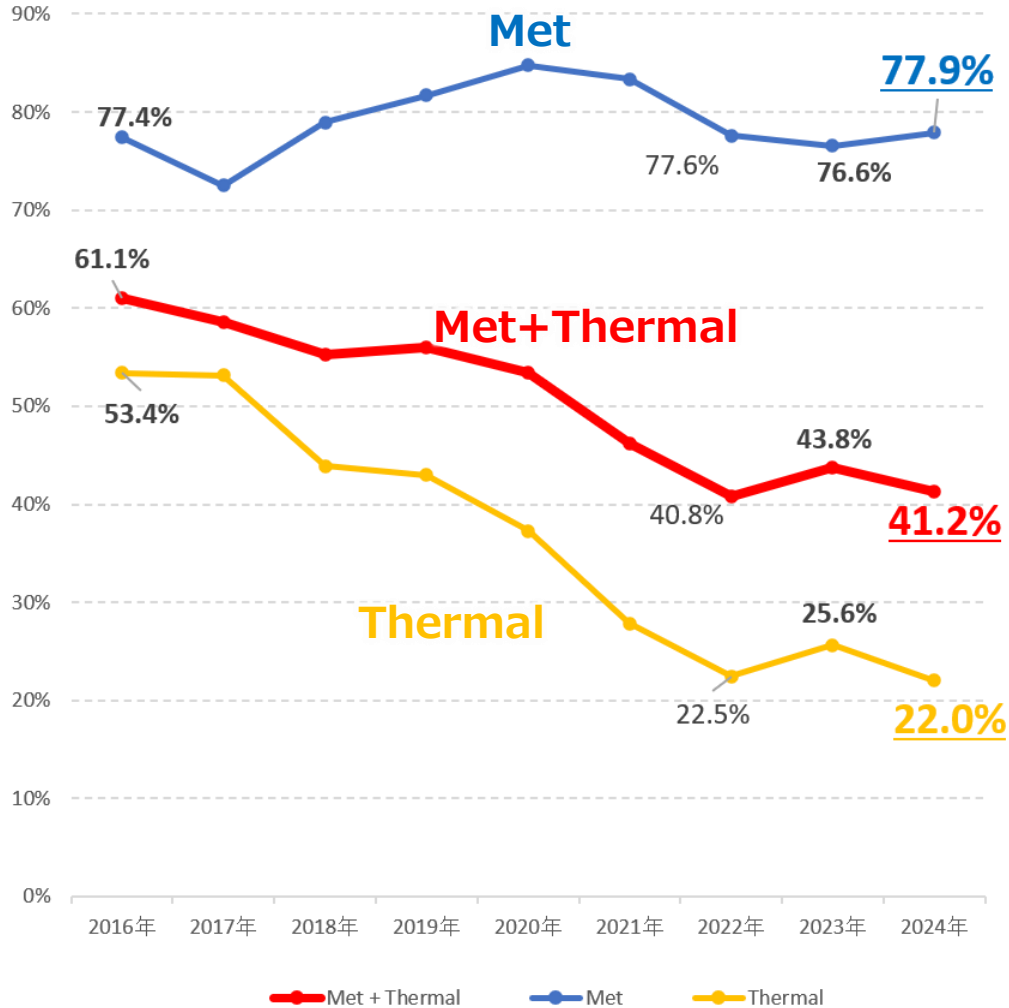
Changing Coal Policy to prioritize domestic economy

- Trump Administration's Coal Support Policy in USA.
- Centralized control in coal exports by One National Company(DSI) in Indonesia



Coal Policy in Japan

Coal Independent Development Ratio

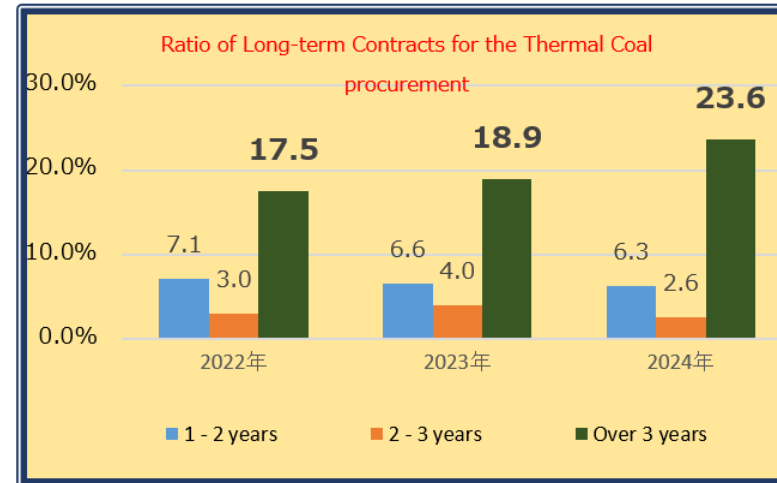


Japan Organization for Metals and Energy Security

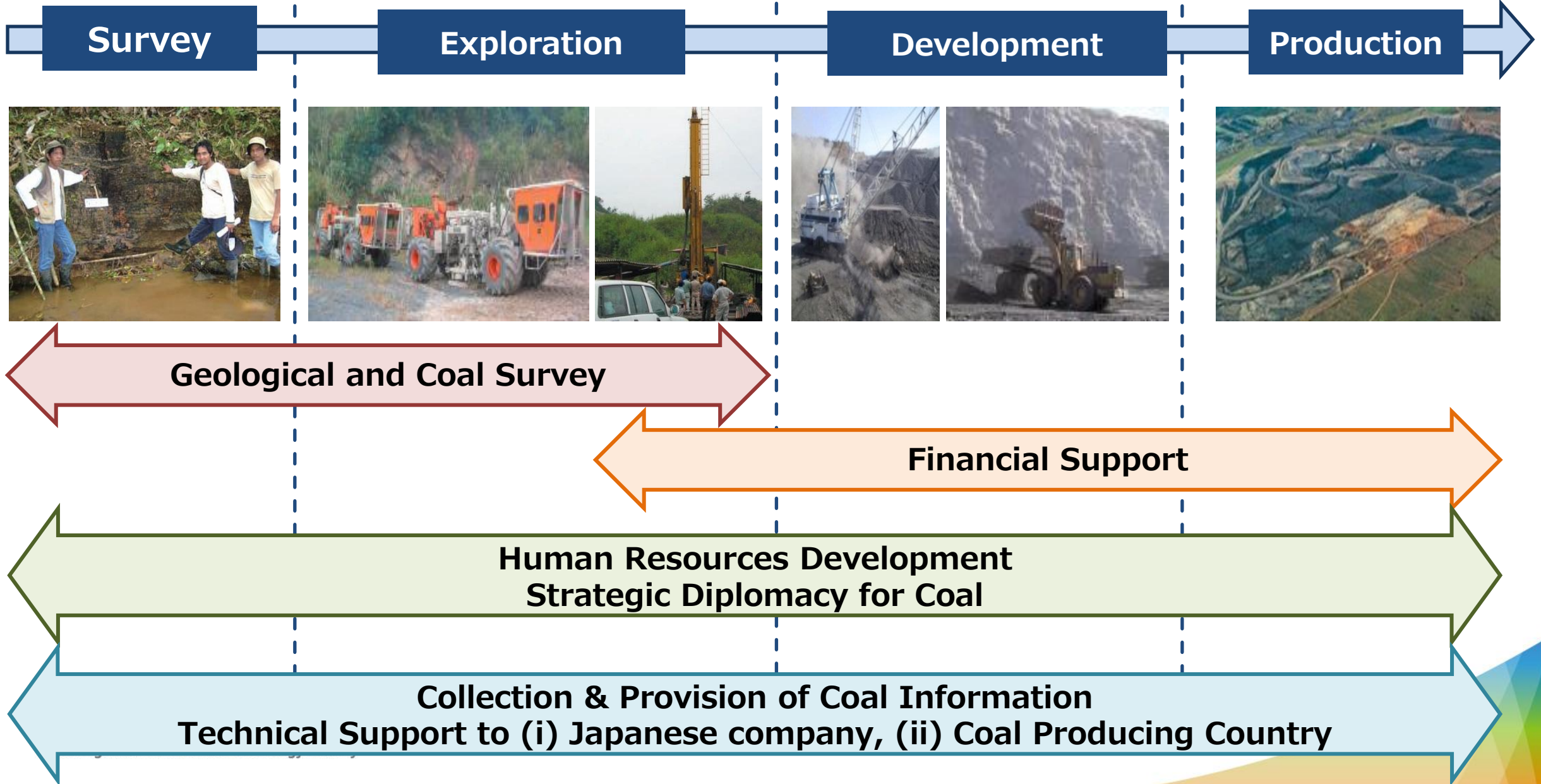
Coal Independent Development Ratio(CIDR)

= (Coal production volume from Japanese companies' interests) / (Annual coal demand in Japan)

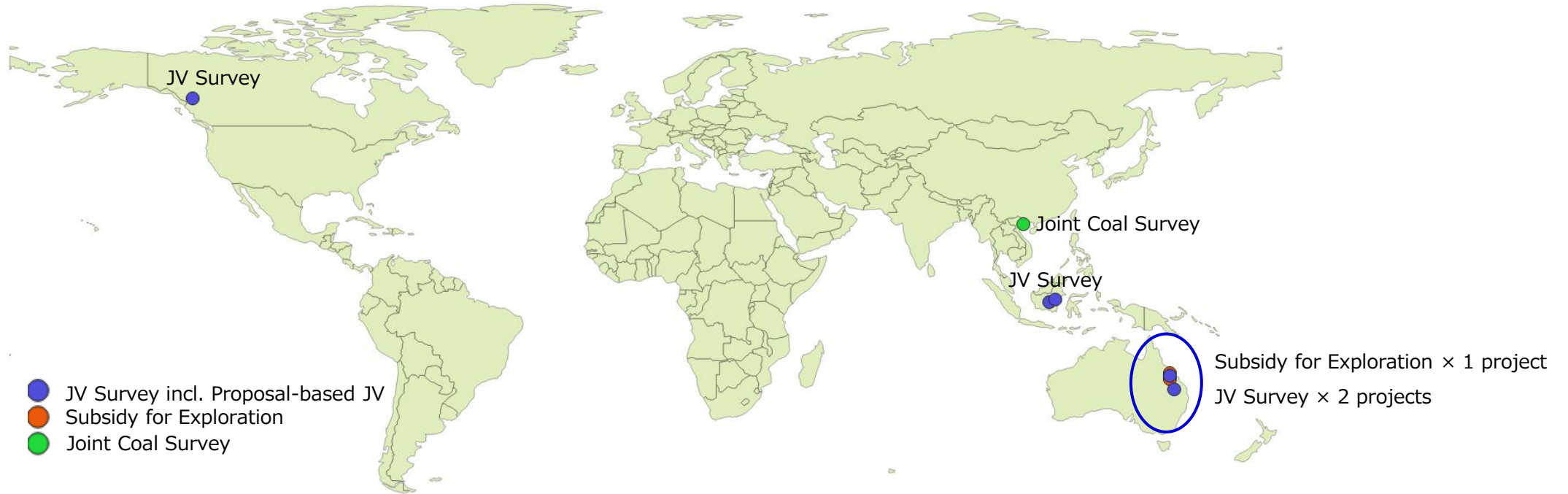
Ratio of "Long-term Contracts for the Thermal Coal procurement" added as supplementary indicators to keep the stable supply of thermal coal in the 7th Strategic Energy Plan.



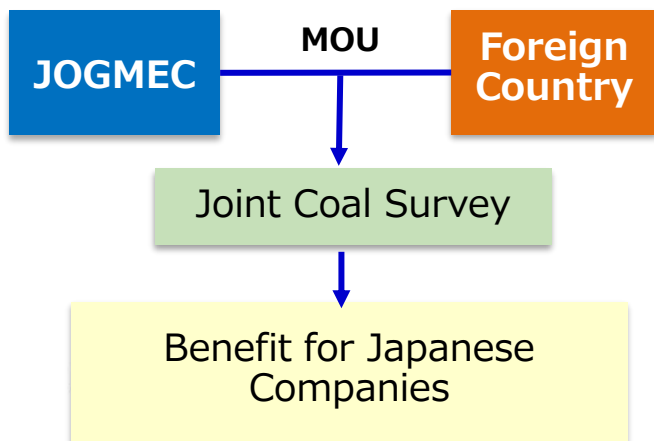
How to Support Stable Coal Supply



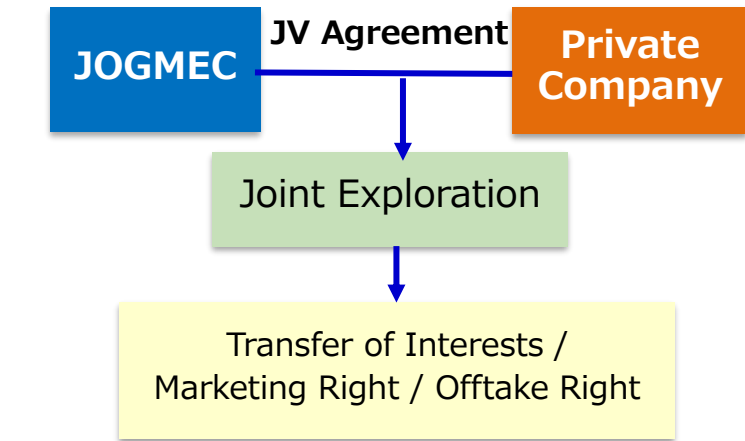
Geological and Coal Survey



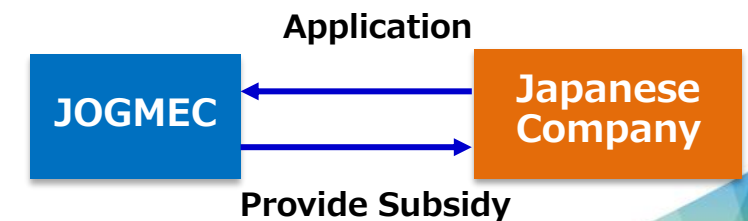
Joint Coal Survey (G&G)



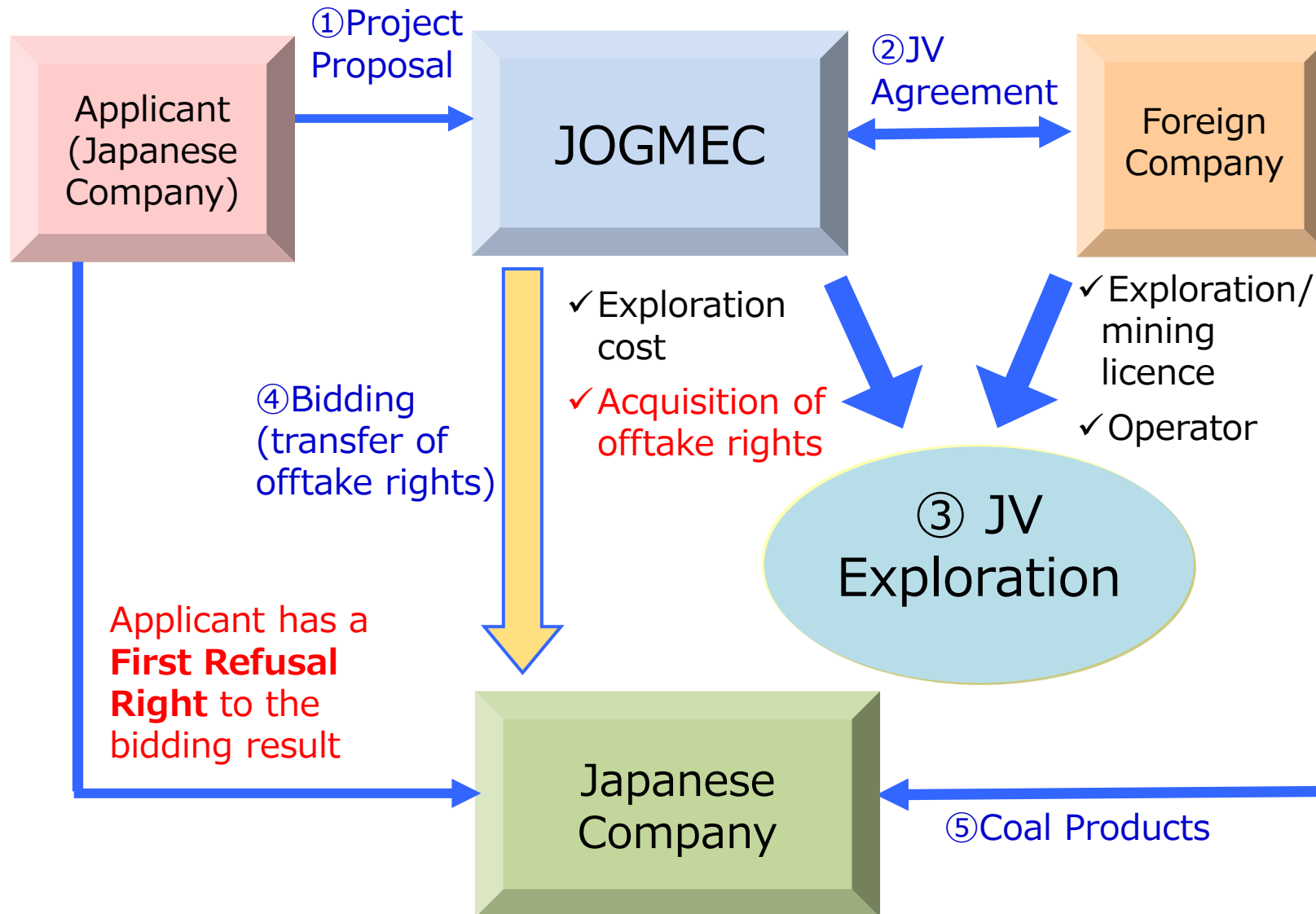
JV Survey



Subsidy for Exploration



New scheme “Proposal-based JV”



- JFY2024: Proposal-Based JV Scheme Started
- JFY2026: Internal Regulations Revisions in progress

Key Terms under revisions (Obligation of Applicant)

Item	Current regulation	Revised regulation
Coal supply	Majority supplied to Japan	Supply obligation to committed Japanese users
Cost Liability	Applicant liable for 1/3 of JOGMEC expenditure	No applicant liability

Strategic Diplomacy for Coal

Australia

MOU with QLD (2013~)

- Feb. 2026, Investment Seminar@Tokyo on QLD's coal policy



Keynote Speech by Minister of Natural Resources and Mines, Mr. Dale Last at Investment Seminar

MOU with NSW(2017~)

- 2026, Meetings@Sydney/Online regarding with NSW's new coal policy

South Africa



Signing Ceremony for MOU with the Minerals Council South Africa

Indonesia



Meeting with ESDM

Vietnam



Signing Ceremony of training program for MOU with Vinacomin

Colombia



Meeting with MME

- Headlines of global coal projects/companies/policies/market trends
- Analysis of global coal market/demand-supply
- Research Reports based on specific themes selected annually



Reporting by JOGMEC's Coal Analyst

【Research Report's Themes(2025)】

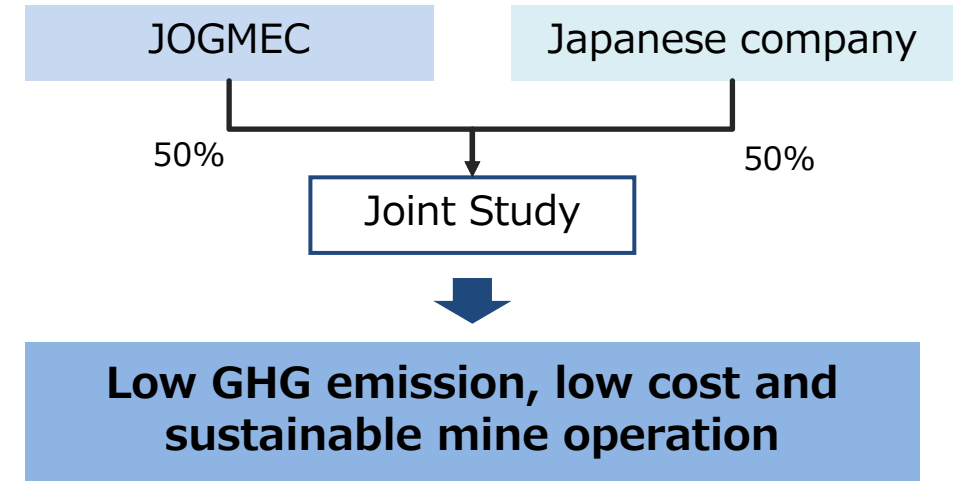
- Global Coal Survey of 19 coal countries
- Coal Business and the surrounding business environment for the stable supply of Australian coal
- Coal Policy and Trends of Coal Mining Enterprises in Indonesia and Impact on Coal Supply and Demand
- Environmental and Electric Power Policy Trends Concerning Coal and Other Fuels in Major Developed Countries: Exploring the Impact of U.S. Policy
- Current Status of production, shipment, and sales of North American coal, incl. A coal-flow survey covering exports to Japan

Joint Study for Technical Solution

Target Scope of Works

Technical issues associated with the coal mine project :

- ① **Evaluation and F/S**
- ② **Production Technology**
- ③ **Environmental Countermeasures**



Joint Studies in JFY 2025

① Plant species suitability study for rehabilitation sites

- "iHemp" (Industrial Hemp) planting trials at a Queensland mine site to assess rehabilitation potential.

② Study of materials and business viability of decarbonized blended coal for steelmaking

- Decarbonized material procurement study in Australia.
- Assessment of timing, costs, and risks for carbonization/blending operations.
- Preliminary assessment of supply chain economics.

Further Support to Japanese Companies

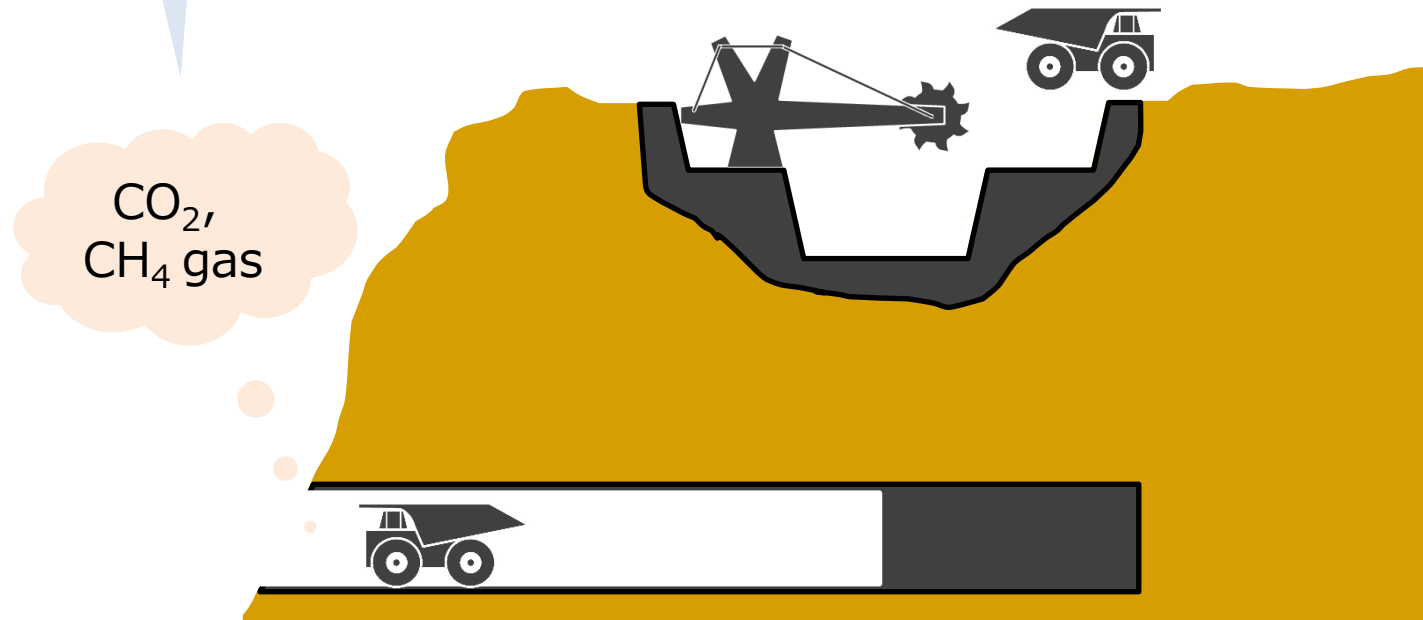
Support in coal mining fields to reduce GHG (e.g Australian Safeguard Mechanism)

- Reduction GHG by Capturing and using CH₄ gas

- Equipment electrification
- Utilization AI and IoT for mining

Joint Study item between Japanese company and JOGMEC

- Reduction of GHG from coal mine by
 - ✓ capturing and utilizing CH₄ gas
 - ✓ decarbonization of CH₄ gas
- Equipment electrification using green-energy
- Utilization AI and IoT



- The positioning of coal and the business environment are undergoing significant changes due to the influence of the international situation.
- JOGMEC is supporting coal business, which is facing a challenging environment, through various activities to maintain Japan's resource and energy supply-chain.
- To keep using coal without causing supply disruptions, JOGMEC would support the project while building and strengthening good relationships with stakeholders both domestically and internationally.



Thank you for your attention.

