

NSW Coal Industry

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Energy Security with Decarbonization Symposium 2026

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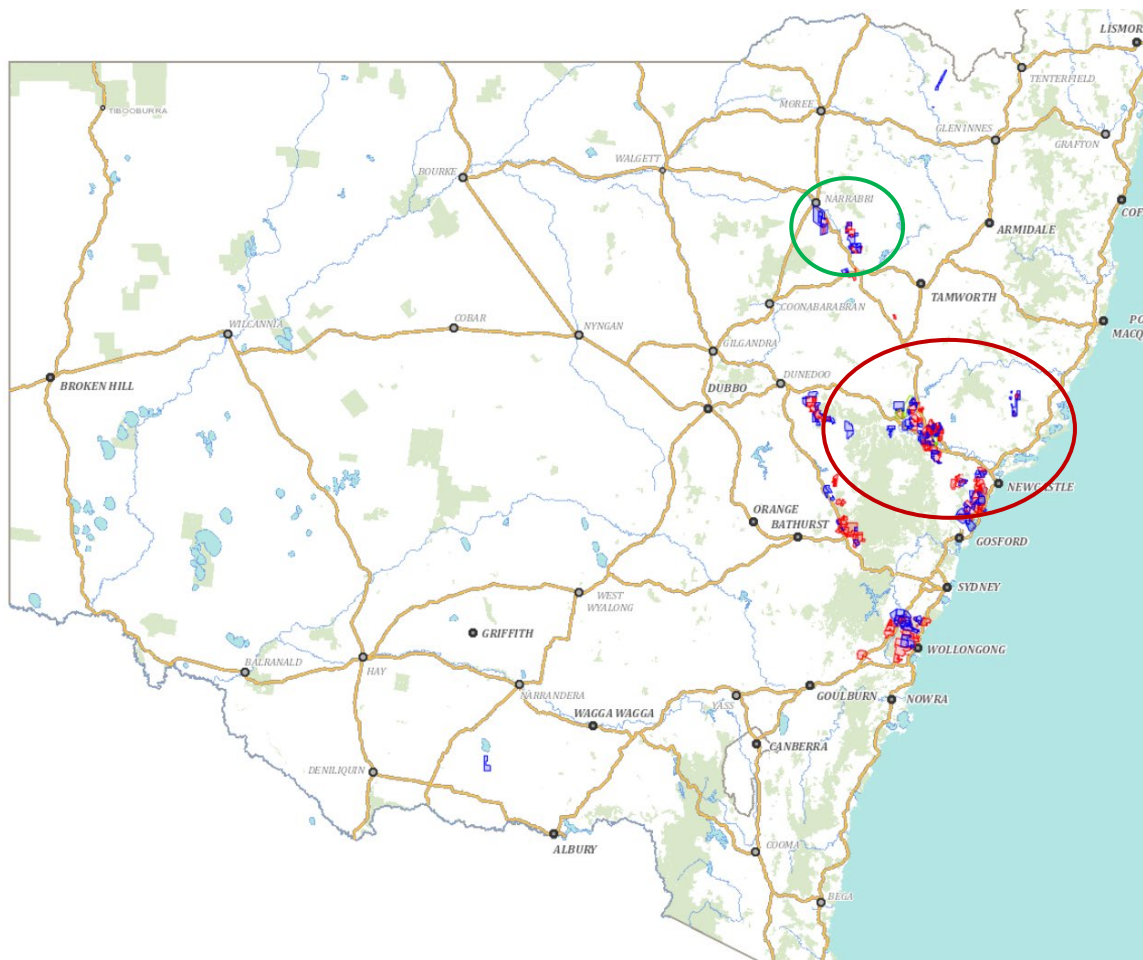
NSW-Japan trade and partnership

- 160-plus years of bilateral trade
- NSW coal supports Japan's energy security and manufacturing
- Government cooperation through the NSW - JOGMEC Memorandum of Understanding
- Stable policy settings support future investment and supply



Source: Port of Newcastle

Long-standing Japanese investment in NSW coal



Gunnedah Basin

Boggabri (Idemitsu Kosan, Nippon Steel)

Maules Creek (Itochu, J-Power)

Hunter Valley

Bulga (Nippon Steel, JFE Shoji)

Muswellbrook (Idemitsu Kosan)

Mount Pleasant (Japanese Coal Development)

Port Waratah Coal Services - Newcastle
(Japanese shareholder participation)

Japanese companies maintain investments across major NSW coal mines and critical export infrastructure

The NSW coal industry

35 operating coal mines support 24,500 direct jobs across NSW

Region	Number of mines	Coal mining economic output ¹		Direct employment ²	Extension projects
Hunter	19	\$15.2B	58%	14,915	6
North West	5	\$3.9B	15%	3,202	5
Central West	7	\$4.9B	19%	3,573	3
Illawarra	4	\$2.1B	8%	2,813	2
Total	35*			24,503	16

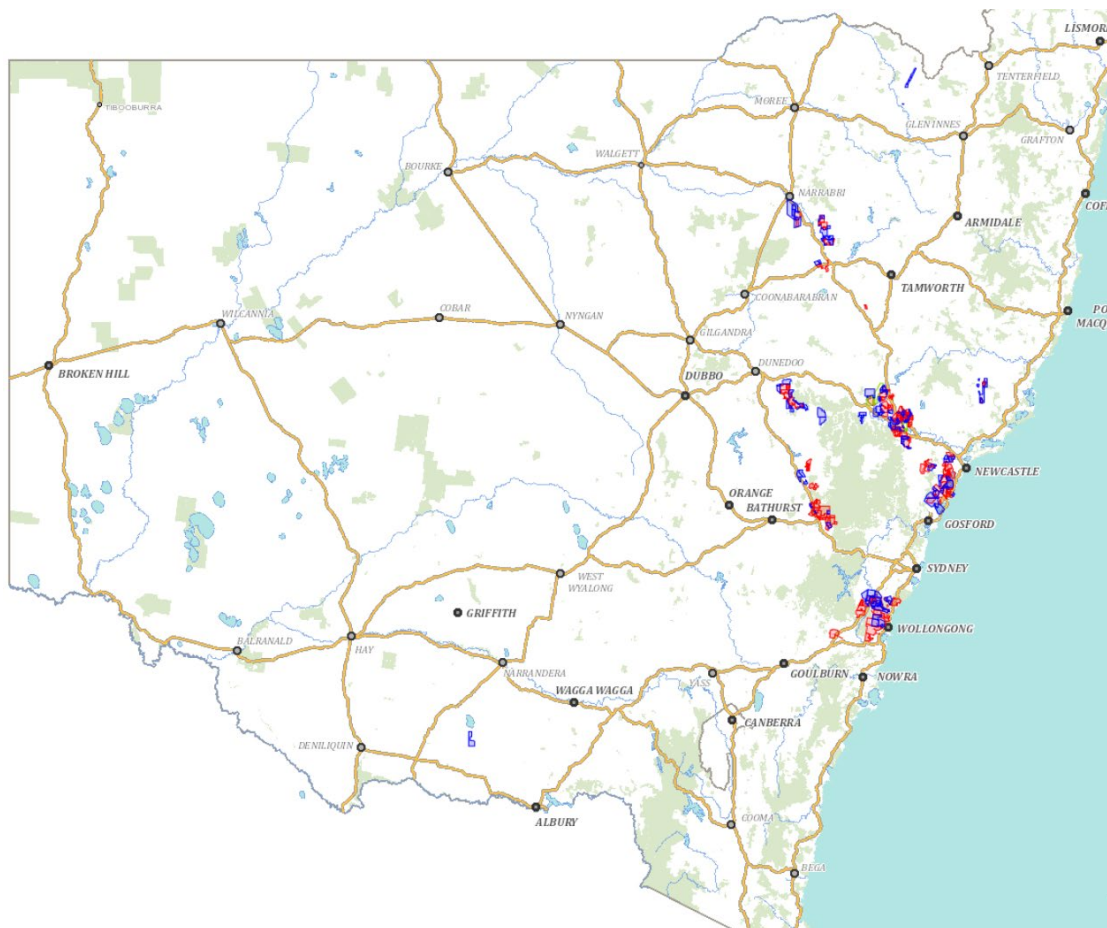
Note:

*Tahmoor and Dartbrook suspended operations during the 2025 calendar year.

¹NSW Government Royalty Data (2025)

² Estimated direct employment as of March 2026

Coal exploration and mining titles



Exploration

- 122 titles
- 223,055 hectares

Mining

- 447 titles
- 355,182 hectares
- 35 'active' mines

(Tahmoor and Dartbrook suspended operations during the 2025 calendar year)

Key statistics for CY2025



\$2.7 b
in royalties



26%

of the state's merchandise
export revenue



35
mines produced coal



23,800

people directly employed
in coal mining



\$23.4 b
in export value

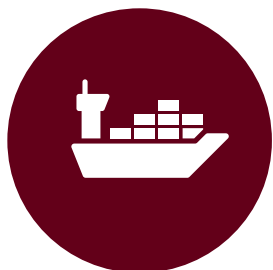
NSW coal export destinations in 2025



Japan remained
NSW's largest
coal export
market in 2025

Rest of world (13 countries) 4%. Source: Coal Services Exports by Destination (2025).

Japan: NSW's largest coal export market in 2025



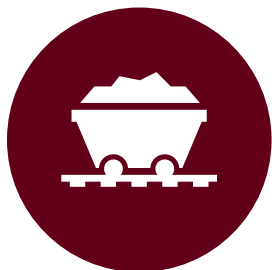
JAPAN

was the largest destination for NSW coal exports, receiving **43%** of NSW coal exports



\$11.37b AUD

total export value of NSW coal to Japan



Of these exports, **93% thermal** and **7% metallurgical coal**



More than 50% of all Australian coal exported to Japan was from NSW

NSW Coal Industry 2026-50



NSW will continue to supply coal to trading partners where there is demand



No new standalone greenfield coal mines but NSW has significant reserves of coal adjacent to existing mines



Applications to extend existing coal mines will continue to be considered



Role for industry in reducing emissions through abatement and offsets



Supports post -mining land use and workforce transition opportunities



NSW Coal Industry 2026-50 supports ongoing supply to Japan



Long-term policy certainty for exploration and mining, supporting mining, jobs and net zero commitments



Continued coal supply with existing reserves expected to meet forecast demand

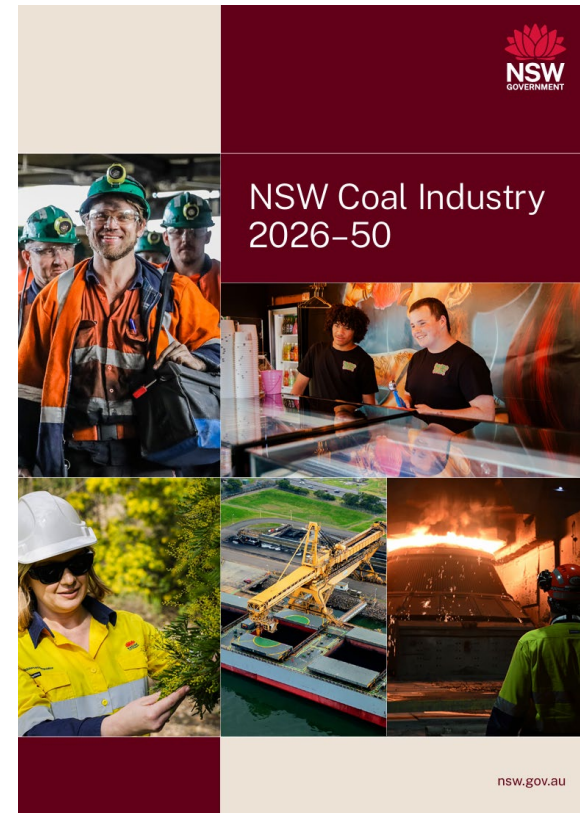


Stable investment environment reinforcing NSW's role as a reliable long-term trading partner



Honouring NSW's coal export commitments

NSW will continue to
supply high -quality
thermal and metallurgical
coal to our trading
partners



Thank you for listening.

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