



**INDONESIA MARKET &  
LOGISTICS INFORMATION**

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ITL CIRCULARS

**JULY 2021**



**PT. INTERNASIONAL TOTAL SERVICE & LOGISTICS**

Your Reliable Integrated Logistic Partner

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# Logistic Information

3,139

BDI  
(Per 14th Jul)

## Bunker Price

Bunker Price	Singapore <i>per 14th Jul</i>
FO380	431.00
FO180	-
MGO	606.00

*\* Inclusive VAT, Income tax & PBBKB.*

## Currency exchange Rate (USD)

Buy : IDR 14.420

Sell : IDR 14.565





## Weather Forecast



Area	Weather	Winds	Swell
Samarinda	Chance of Storm 28°/24°C	5 - 21 km/h	0.2 - 0.6 m
Banjarmasin	Mostly Cloudy 33°/23°C	8 - 17 km/h	0.3 - 0.6 m
Balikpapan	Chance of Storm 29°/25°C	7 - 21 km/h	0.3 - 0.7 m
Tarakan	Chance of Storm 29°/26°C	10 - 18 km/h	0.1 - 0.3 m
Muara Satui	Chance of Rain 30°/23°C	8 - 17 km/h	0.3 - 0.6 m

## Congestion Information (Jun-Jul)

PORT	PORT STAY	TOTAL STAY
ADANG BAY	4.44	8.62
ASAM-ASAM	0.5	5.3
BCT	1.57	2.3
BALIKPAPAN	1.67	3.44
BUNATI	1.52	6.88
IBT	2.5	5
KALIORANG	4.86	8.86
MUARA PANTAI	0.5	4.17
SAMARINDA	2.29	6.37
TABONEO	3.26	7.27
TBCT	4	4.5
TG.BARA	7.5	11.5
TARAKAN	0.87	4.91
TG.PEMANCINGAN	4.75	5.75
TG.SABAU	0.33	4.33
TG.SABAU	1.5	55
TBCT	5.18	6
TG. BARA	5.17	9.33
TG.PEMANCINGAN	1	12
TG.SABAU	3	7.5

## Indonesia and Global Coal News

### Indonesian Government's Benchmark Thermal Coal Price (HBA)

Month	2016	2017	2018	2019	2020	2021
January	53.20	86.23	95.54	92.41	65.93	75.84
February	50.92	86.23	95.54	91.80	66.89	87.79
March	53.20	83.32	100.69	90.57	67.08	84.49
April	52.32	82.51	94.75	88.85	65.77	86.68
May	51.20	83.81	89.53	81.86	61.11	89.74
June	51.87	75.46	96.61	81.48	52.98	100.33
July	53.00	78.95	104.65	71.92	52.16	115.35
August	58.37	83.97	107.83	72.67	50.34	
September	63.93	92.03	104.81	65.79	49.42	
October	69.07	93.99	100.89	64.80	51.00	
November	84.89	94.8	97.90	66.27	55.71	
December	101.69	94.04	92.51	66.30	59.65	

*in USD/ton*

*Source: Ministry of Energy and Mineral Resources*



## EIA says U.S. 2020 coal output lowest since 1965

Source : [reuters.com](https://www.reuters.com)

### Highlights

The federal agency said in a report that U.S. coal production totaled 535 million short tons (MMst) in 2020, a 24% decrease from the 706 MMst mined in 2019.

The EIA said the pandemic slowed global demand for coal, and some U.S. mines were idled for extended periods to slow the spread of the virus among workers, with exports declining significantly in April 2020.

U.S. coal-fired generation fell 20% year-on-year and exports were 26% lower in 2020 than in 2019.

Coal production in Wyoming, where more coal is produced than in any other state, was 21% lower in 2020 than it was in 2019, while the second-largest producer West Virginia saw an annual slide of 28%, the agency said.

The EIA explained that the decline was also as a result of less U.S. electric power sector demand for the non-renewable energy source, while lower natural gas prices made coal less competitive for power generation.

## Indonesia sets coal benchmark price at highest in a decade on Chinese demand

Source : [reuters.com](https://www.reuters.com)

### Highlights

The ministry set the benchmark coal price at \$115.35 per tonne in July, higher than the \$100.33 per tonne in June and the highest since \$117.6 per tonne in May, 2011, Refinitiv data showed.

"China's domestic coal supply capacity continues to run low while power generation activities resume," energy and mineral resources ministry spokesman Agung Pribad said in a statement, adding demand also increased from Japan and South Korea.

"This has an impact on the increase in global coal prices," he said.

China unofficially banned imports from its top supplier Australia last year, with Chinese buyers informally told by custom officials not to purchase Australian coal.

This has resulted in China looking elsewhere to source coal, making Indonesia's one of the biggest beneficiaries.

China signed a deal worth around \$1.5 billion to buy Indonesian thermal coal last year.

# Indonesian 3Q21 coal exports could surge to 109mt amid strong Far East demand

Source : [ihsmarkit.com](https://www.ihsmarkit.com)

## Highlights

As per the IHS Markit's Commodities at Sea, Indonesian coal shipments during June 2021 stood at 35.3mt (up 25 percent y/y). In terms of regions, shipments from East Kalimantan, South Kalimantan, and Sumatra stood at 18.9mt (up 9 percent y/y), 11.0mt (up 56 percent), and 3.7mt (up 61 percent), respectively.

Renewed COVID-19 outbreaks are slowing the economic recovery in the country and putting pressure on fiscal shortfalls. However, there is an increase in taxes from coal exports due to an increase in international demand in addition to the surge in coal prices. As per the Ministry of Energy and Mineral Resources of Indonesia, the monthly benchmark coal price (HBA) basis, 6300 GAR surged further in July 2021 and announced at \$115.35/t (highest since November 2011), up 15 percent m/m and 121 percent y/y. HBA prices after bottoming out in September 2020 have been on an upward trajectory driven by strong demand from China (Mainland) and lately from Japan and South Korea.

Indonesian coal shipments during June 2021, to Mainland China, which accounts for 53 percent of total Indonesian coal export, stood at 18.6mt (up 15 percent m/m, and 70 percent y/y). While shipments to India stood at 4.5mt (down 25 percent m/m and 14 percent y/y). Shipments to South Korea, Japan, Malaysia, and Taiwan stood at 1.5mt (up 20 percent m/m, but still down 13 percent y/y), 1.1mt (down 21 percent m/m, and 39 percent y/y), 2.2mt (up 22 percent m/m, and 31 percent y/y), and 1.9mt (down 13 percent m/m, and 7 percent y/y), respectively.

In terms of major destinations, during 1H2021, there was an increase in shipments only to Mainland China (87.5mt, up 31 percent y/y) and Taiwan (11.6mt, up 12 percent); while declined to Japan (10.5mt, down 28 percent), South Korea (9.1mt, down 21 percent) and Malaysia (11.7mt, down 11 percent). Shipments to India were mostly flat and at almost previous year levels of 42.0mt.

In terms of vessel segment, during the first half of 2021, there was a surge in loadings on Panamax (67mt, up 18 percent), and Capesize (17.8mt, up 31 percent). Indonesian coal shipments declined on Kamsarmax and Supramax, which stood at 24.1mt (down 8 percent y/y) and 39.8mt (down 11 percent), respectively

## Coal and Coke Export in January-May 2021

Source : [seanews.ru](http://seanews.ru)

### Highlights

According to the RF Federal Customs Service, in January-May 2021 Russia exported 81.5 mn tons of coal, up 12.8% year-on-year. In terms of value, coal export amounted to more than \$5.3 bn, up 12.1% year-on-year.

Coal import during the period under report made 8.5 mn tons, down 7.3% year-on-year, worth \$159.8 mn, up 21.7% year-on-year.

Coke and coal char export in January-May 2021 made 1.4 mn tons, up 69.8% year-on-year, worth \$339.6 mn (up 2.1-fold year-on-year).

In May, coal export made 16.9 mn tons, up 8.4% year-on-year and up 17.1% month-on-month. Value-wise, coal export increased by 16.8% year-on-year and by 22.2% month-on-month making 1.2 bn.

Coke and coal char export in May amounted to 292.7 thousand tons, up 56.3% year-on-year and up 26.9% month-on-month. In terms of value it was worth \$88.7 mn, up 2.7-fold year-on-year and up 33.4% month-on-month.

## Coal consumption peak still not on the horizon: Think tanks

Source : [thehindubusinessline.com](http://thehindubusinessline.com)

### Highlights

Rise in electricity demand may lead to further growth in India's coal consumption, according to a report.

India's electricity market has a structural shortage in supply. Latent electric demand is that which is automatically seen whenever supply grows.

Additionally, the expected rise in electric demand during India's economic recovery after two waves of Covid and previous slowdown may give another lifeline of growth to coal consumption. "When demand surges again as the economy recovers, or when latent demand has to be met, there is likely to be an increase in coal demand as well, at least while cost of renewables plus storage does not become cheaper than the variable cost of generating coal-based power."

A new high in India's coal consumption is more likely to occur in the absence of unexpectedly low battery storage costs, the report said. The Centre has announced policies relying on another fossil fuel, natural gas, to act as a bridge in sectors such as industry and transport, but gas-fired power plants continue to suffer with low usage levels.

"India has already begun auctions for solar-plus-storage and round-the-clock renewables generation. These bids are designed to increase competition while driving down the prices of renewable electricity without intermittency challenges," the report added.



## ITL Vessel Line Up

Apr	May	Jun	Total Vessel
567	509	494	1572

PLEASE NOTE THAT THE ABOVE DATA IS NOT COMPLETED LINE UP OF TBCT, IBT, NPLCT.

COUNTRY WISE			
No	Country	Shipments	Percentage
1	China (Incl. HK)	657	42%
2	Indonesia	186	12%
3	India	166	11%
4	Philippines	124	8%
5	Malaysia	73	5%
6	Vietnam	62	4%
7	Korea	57	4%
8	Thailand	56	4%
9	Taiwan	53	3%
10	Japan	47	3%
11	Others	33	2%
12	Bangladesh	27	2%
13	Singapore	25	2%
12	Pakistan	6	Below 1%

\*Others: Myanmar, Srilanka, New Zealand, Spain, Rusia, Hawaii.

PORT WISE			
No	Port	Shipments	Percentage
1	Samarinda	310	20%
2	Taboneo	306	19%
3	Bunati	154	10%
4	Adang Bay	122	8%
5	Muara Pantai	106	7%
6	BCT	104	7%
7	Tarakan	74	5%
8	Palembang	63	4%
9	TBCT	59	4%
10	Tg. Bara	53	3%
11	Tg. Pemancingan	39	2%
12	Balikpapan	32	2%
13	Kaliorang	31	2%
14	Muara Sangkulirang	29	2%
15	Asam - Asam	25	2%
16	Tarahan	22	1%
17	NPLCT	16	1%
18	IBT	11	1%
19	Kota Baru	7	Below 1%
20	Tg. Sabau	5	Below 1%
21	Muara Satui	4	Below 1%

*PLEASE NOTE THAT THE ABOVE DATA IS NOT COMPLETED  
LINE UP OF TBCT, IBT, NPLCT*



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**Cargo Handling & Agency Services**

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