



**INDONESIA MARKET &
LOGISTICS INFORMATION**

ITL CIRCULARS

NOVEMBER 2021



PT. INTERNASIONAL TOTAL SERVICE & LOGISTICS

Your Reliable Integrated Logistic Partner

Prosperity Tower, 11/F #AJ

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Logistic Information

2,430

BDI
(Per 17th Nov)

Bunker Price

Bunker Price	Singapore <i>per 17th Nov</i>
FO380	467.00
FO180	-
MGO	689.50

* Inclusive VAT, Income tax & PBBKB.

Currency exchange Rate (USD)

Buy : IDR 14.187 Sell : IDR 14.330





Weather Forecast



Area	Weather	Winds	Swell
Samarinda	Chance of Storm 32°/23°C	5 - 11 km/h	0.1 - 0.2 m
Banjarmasin	Chance of Storm 33°/23°C	6 - 12 km/h	0.1 - 0.3 m
Balikpapan	Chance of Storm 30°/24°C	10 - 13 km/h	0.1 - 0.3 m
Tarakan	Chance of Storm 31°/26°C	10 - 13 km/h	0.1 - 0.2 m
Muara Satui	Mostly Cloudy 32°/23°C	6 - 10 km/h	0.1 - 0.3 m

Congestion Information (Oct-Nov)

PORT	PORT STAY	TOTAL STAY
ADANG BAY	1.52	4.59
ASAM-ASAM	1.4	7.4
BCT	1.55	1.79
BALIKPAPAN	1	2.32
BUNATI	0.79	5.5
IBT	1.89	3.89
KALIORANG	3	6
MUARA PANTAI	1.78	6.17
M.SANGKULIRANG	1	6
PALEMBANG	2	6.33
SAMARINDA	1.66	5.92
TABONEO	2.60	6.27
TARAKAN	2.36	6.36
TARAHAN	2	3
TBCT	8	80
TG.SABAU	0.5	4.5

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	130.99
September	63.93	92.03	104.81	65.79	49.42	150.03
October	69.07	93.99	100.89	64.80	51.00	161.63
November	84.89	94.8	97.90	66.27	55.71	215.01
December	101.69	94.04	92.51	66.30	59.65	

in USD/ton

Source: Ministry of Energy and Mineral Resources



China boosts coal output as winter looms

Source : [thestandard.com.uk](https://www.thestandard.com.uk)

Highlights

China's daily coal output hit 11.93 million tonnes last week, a multi-year high as more capacity returned to operation, the state planner said yesterday, as Beijing tries to fill a supply shortage ahead of winter.

Average daily coal output for the first five days of November reached 11.66 million tonnes, up by 1.2 million tonnes from end-September, the National Development and Reform Commission said, adding that 11.93 million tonnes of coal output were logged for one of the days during the period.

Coal inventories have also been gained. Stockpiles at power plants exceeded 117 million tonnes as of Saturday, said the NDRC, while portside inventories gained nearly 1.5 million tonnes from over a month ago to 5.39 million tonnes last Sunday.

"With more coal capacity to be released and production to continue to increase ... coal prices are expected to continue to decline steadily," the NDRC said.

This came as China's State Grid warned of a "tight balance" between power supply and winter demand last Sunday, saying that may continue even after an energy crunch eased following measures to boost coal supplies and get large users to cut back on electricity. There could even be power outages as hydropower generation is expected to fall while consumption picks up during the winter heating season. By November 6, almost no region required residential and industrial users to cut power use, the firm said.

Extreme Weather 'Helps' Coal Prices Remain Stable at the End of the Year

Source : [Suara.com](https://suara.com)

Highlights

According to the Indonesian Coal Mining Association (APBI), extreme weather that is expected to occur at the end of the year until the new year will trigger a shortage of coal and prevent price corrections.

Despite an increase in rally in the past few weeks, due to coal is global predicted to decline government intervention, Chinese including increasing domestic production to limit commodity prices.

Moreover, China is now still wary of extreme winters and lower than usual air temperatures due to the impact of the La Nina phenomenon.

This condition will disrupt coal production in the country and increase coal consumption to ward off low temperatures.

Meanwhile, the La Nina phenomenon will also have an impact on supplying countries coal such as Indonesia, because it triggers hydrometeorological disasters that can hamper coal production activities and distribution lines.

At the end of 2020, Chinese coal importers agreed to buy coal from Indonesia for the next three years with a transaction value of US\$1.46 billion or equivalent to Rp20.6 trillion.

Previously, the Ministry of Energy and Mineral Resources stated that the new coal reference price (HBA) in November 2021 touched US\$215.01 per tonne, up 33 percent compared to last month's price of only US\$161.63 per ton.

The HBA level hit its highest value in November and the highest in the last 10 years. The increase in the price was coal reference due to demand from China increased following the onset of winter and bad weather conditions.

India's coal import rises 13% to 107 MT in Apr-Sept

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

Highlights

India's coal import rose by 12.6 per cent to 107.34 million tonnes in the first six months of 2021-22. The country had imported 95.30 million tonnes (MT) of the coal in April-September 2020-21, according to provisional data compiled by mjunction services, based on monitoring of vessels' positions and data received from shipping companies. However, the country's coal import dropped to 14.85 MT in September, against 19.04 MT in the corresponding month of previous fiscal, it said.

"Coal imports in September 2021 were also down by 21.97 per cent over September 2020 when imports stood at 19.04 MT," it said.

"The substantial drop in import volumes in September as compared to the same month last year was in line with expectation, given the steady rise in thermal and coking coal prices in the global market. This trend is likely to continue till there is a significant correction and stability in seaborne prices," Vinaya Varma, MD and CEO, mjunction said. Of the total import in September, non-coking coal was at 9.22 MT, against 11.97 MT imported in September last year. Coking coal import was at 4.27 MT, down from 4.58 MT imported in September 2020.

"India's coal and coke imports during September 2021 through the major and non-major ports are estimated to have dropped by 2.4 percent over August 2021," it said.

Chinese Coal Production Jumps To Six-Year High In October

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

Highlights

China, the largest consumer and producer of coal, saw its October output rising to 357.09 million tons, compared to 334.1 million tons in the previous month, according to data from China's National Bureau of Statistics cited by Reuters.

Chinese authorities have recently ordered the expansion of more than a hundred coal mines amid a coal and energy crisis in the country that led to power outages at factories. The rush to secure more domestic supply resulted in a monthly coal output in October that was at its highest in six and a half years—since March 2015.

Last week, China's daily coal production hit a record high of 12.05 million tons, the National Development and Reform Commission (NDRC) said as quoted by the Xinhua news agency.

The record-high daily coal output has helped ensure energy supply and stabilize prices, NDRC, the top planning body in China, said.

It's not certain whether China could keep high coal production levels in the winter months when colder weather typically curtails some operations and hampers logistics, analysts tell Reuters.

The soaring coal prices and the energy crisis hit China in the third quarter and continued into the beginning of the fourth quarter. In September, the world's second-largest economy restricted power use in at least 20 regions and provinces that contribute more than half to the Chinese economy.

Surging coal prices and power shortages in China slowed the growth of its economy in the third quarter and are now threatening to spill over to the global supply chains in the fourth quarter.

China has moved in recent weeks to squash the surge in coal prices with government intervention, which resulted in a plunge in the price of coal.

Indonesia's Seventh Largest Coal Consumption in the World in 2020

Source : databoks.katadata.co.id

Based on the BP Statistical Review of World Energy 2021 report consumption coal, global was 151.42 exajoules in 2020. This value decreased by 4.2% compared to the previous year which reached 157.64 exajoules. . China is still the country with the highest coal consumption in the world in 2020. The Bamboo Curtain country consumed 82.27 exajoules of coal, equivalent to 54.3% of total global consumption last year.

India is in second place with coal consumption of 17.54 exajoules or 11.6%. Then, coal consumption in the United States was 9.2 exajoules or 6.1%. Japan is in fourth place with coal consumption of 4.57 exajoules. After that, there are South Africa and Russia with coal consumption of 3.48 exajoules and 3.27 exajoules, respectively. Indonesia is ranked seventh with coal consumption of 3.26 exajoules. That number decreased by 4.9% compared to the previous year which was 3.41 exajoules. Below Indonesia is South Korea with coal consumption of 3.03 exajoules. Meanwhile, coal consumption in Vietnam and Germany reached 2.1 exajoules and 1.84 exajoules, respectively

ITL Vessel Line Up

Aug	Sep	Oct	Total Vessel
529	455	408	1392

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)	622	45%
2	India	135	10%
3	Indonesia	132	9%
4	Philippines	116	8%
5	Korea	68	5%
6	Malaysia	60	4%
7	Japan	60	4%
8	Vietnam	49	4%
9	Thailand	43	3%
10	Taiwan	33	3%
11	Singapore	23	2%
12	Bangladesh	21	2%
13	Others	21	2%
14	Pakistan	9	1%

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

PORT WISE

No	Port	Shipments	Percentage
1	Taboneo	306	22%
2	Samarinda	267	19%
3	Adang Bay	117	8%
4	Bunati	116	8%
5	Palembang	106	8%
6	BCT	101	7%
7	Tarakan	92	7%
8	Balikpapan	63	5%
9	Muara Pantai	46	3%
10	Muara Sangkulirang	35	3%
11	Tg. Pemancingan	35	3%
12	Asam - Asam	22	2%
13	Tarahan	18	1%
14	IBT	15	1%
15	Lubuk Tutung	12	2%
16	NPLCT	11	1%
17	Kaliorang	10	1%
18	Kota Baru	9	1%
19	Muara Satui	4	Below 1%
20	Kaliorang	19	Below 1%
21	TBCT	3	Below 1%
22	Tg. Sabau	3	Below 1%
23	Jambi	1	Below 1%

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