Coal Overview:
Current Coal Generation Status and Potential Contribution to Future Needs

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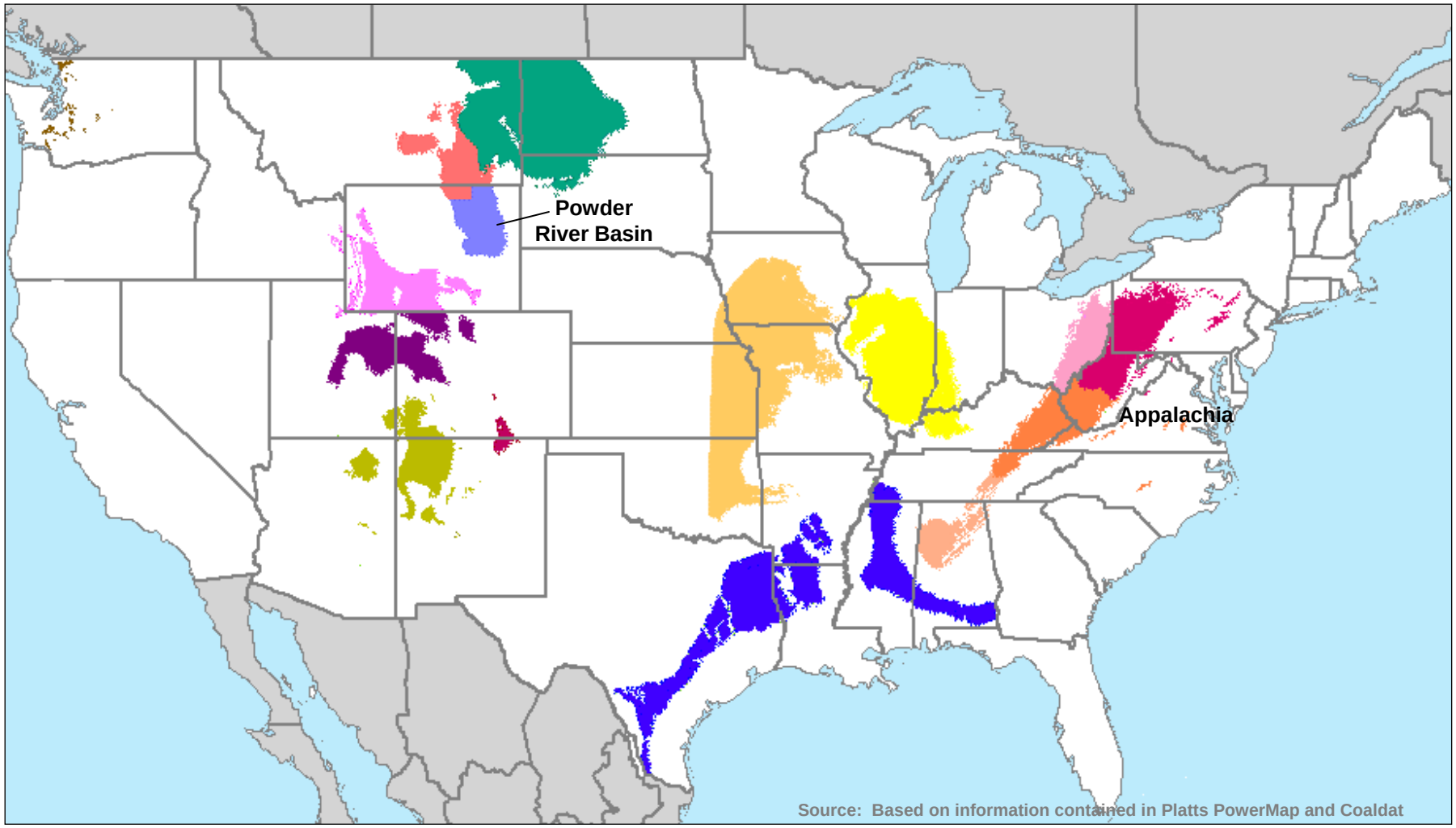
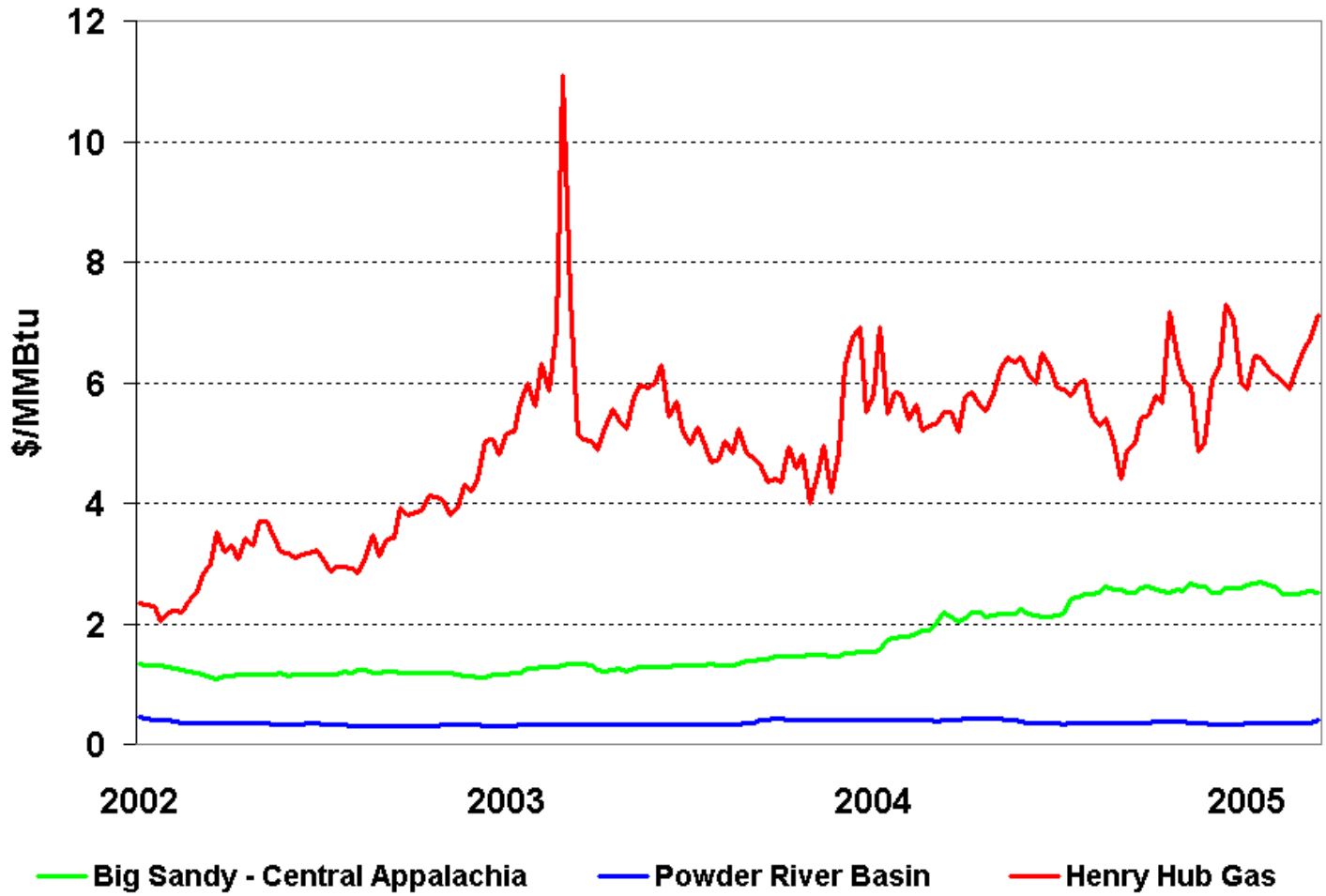
Coal Production in the U.S.

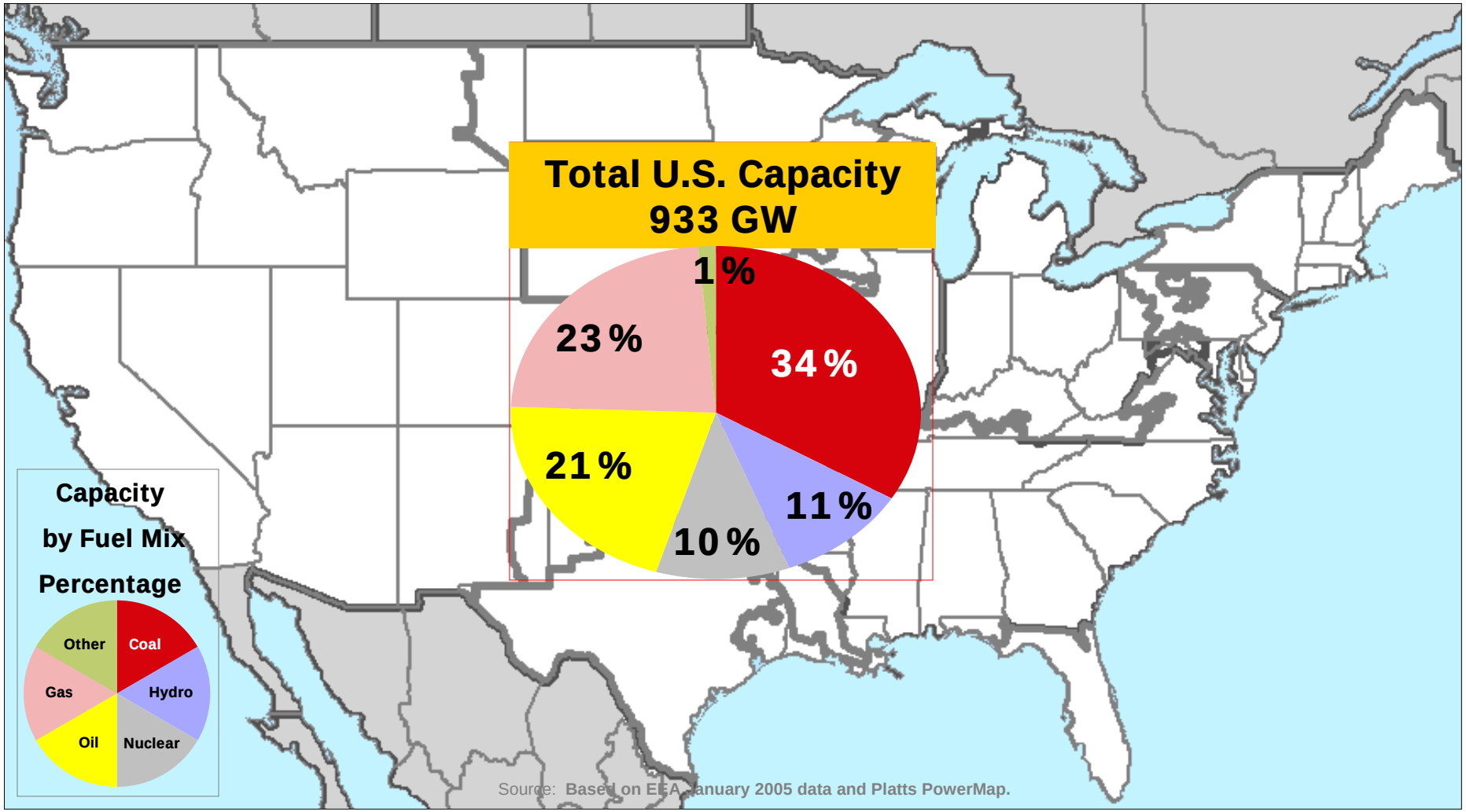


Coal Prices Beat Gas Prices

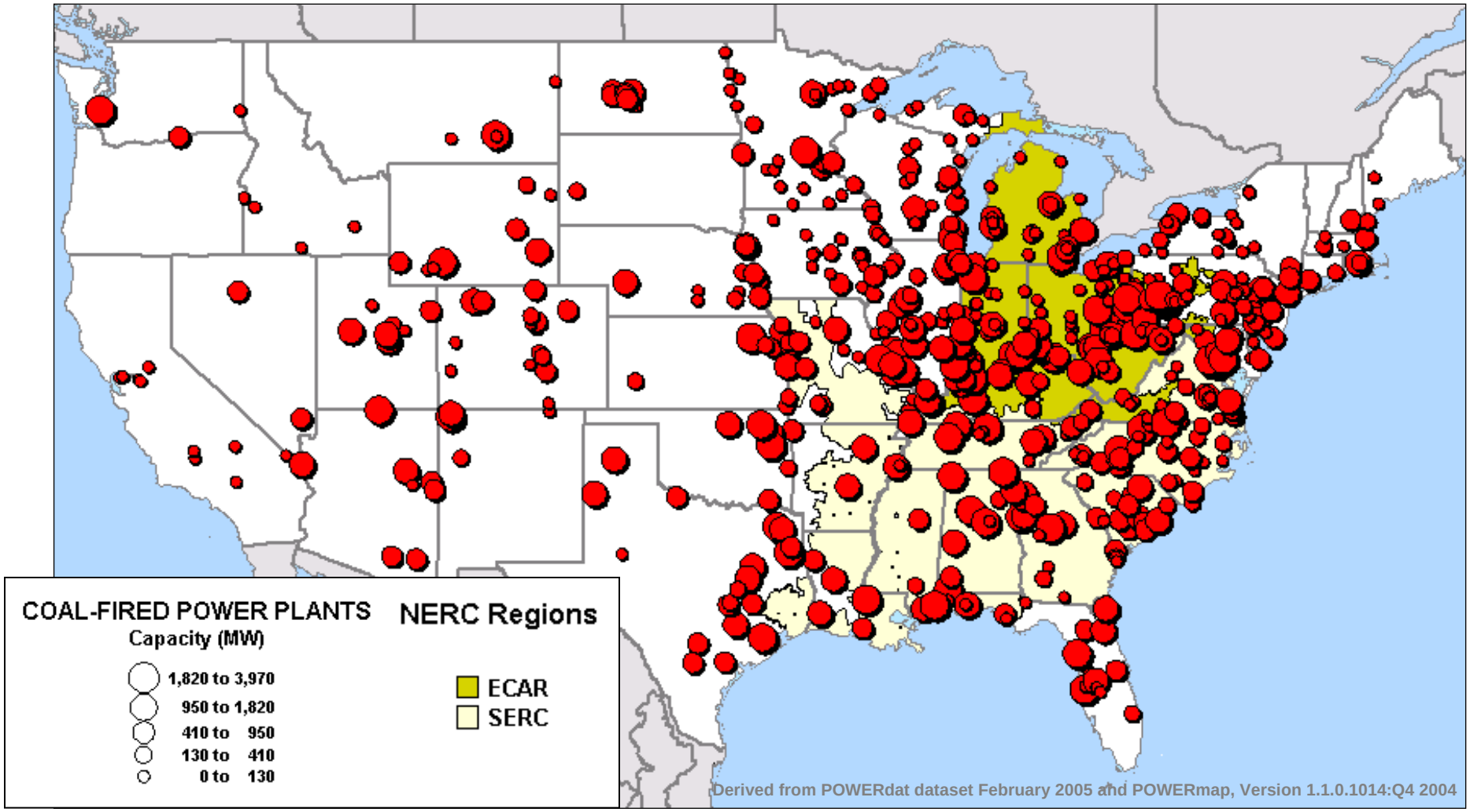


Source: Based on data from Bloomberg and information from EIA's Annual Energy Outlook 2025

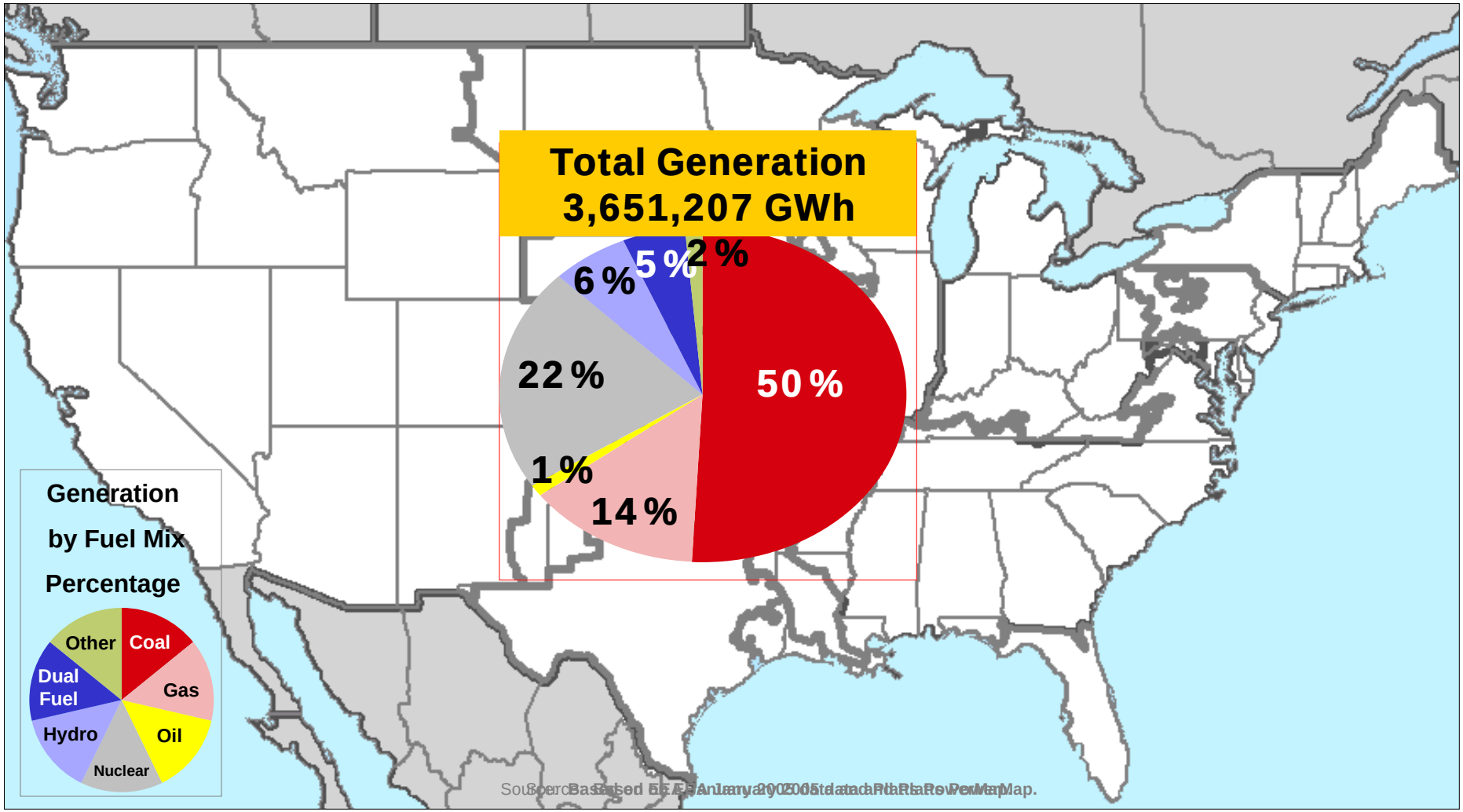
U.S. Generation Capacity



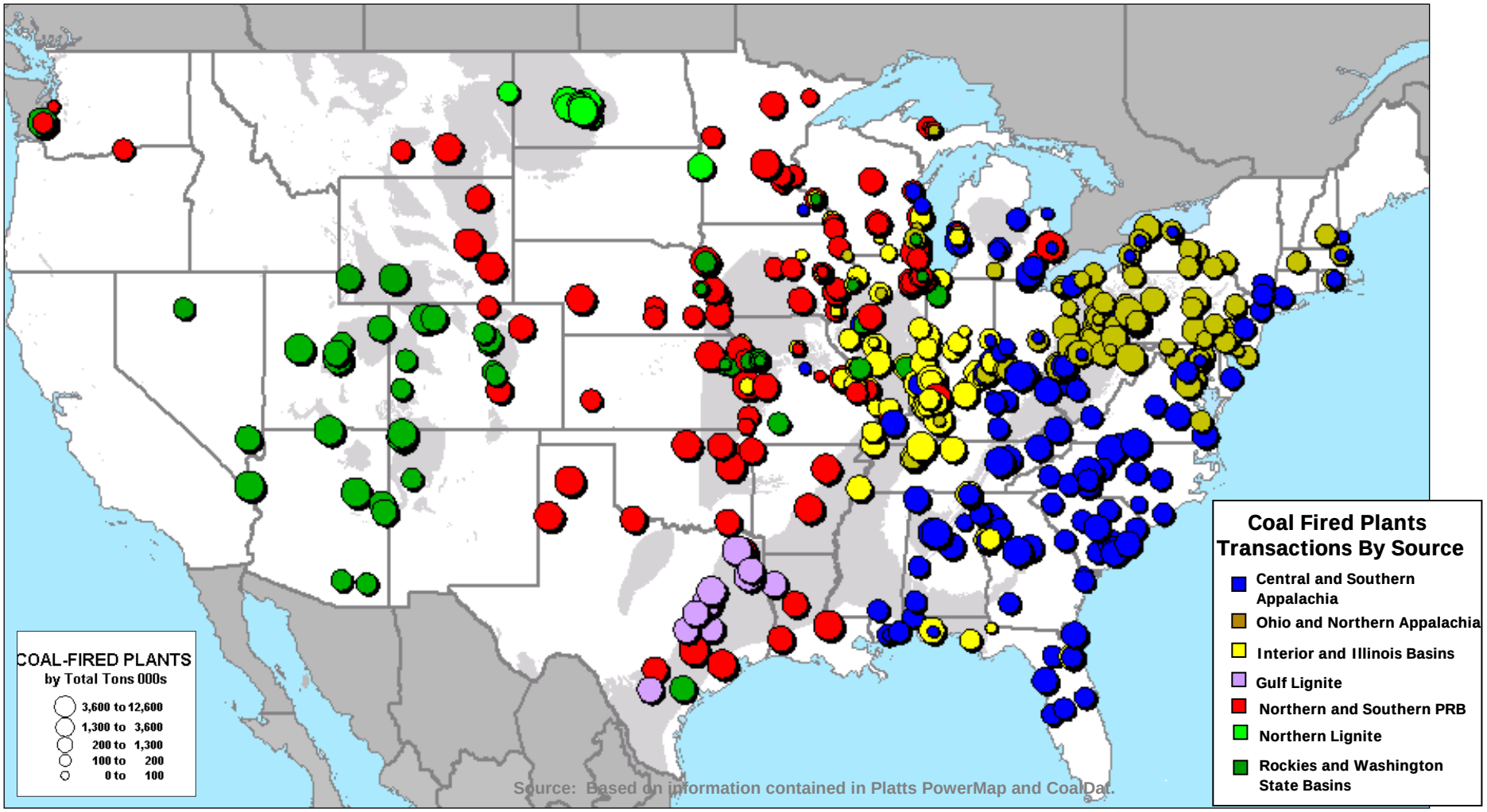
Concentration of Coal-fired Electric Generation



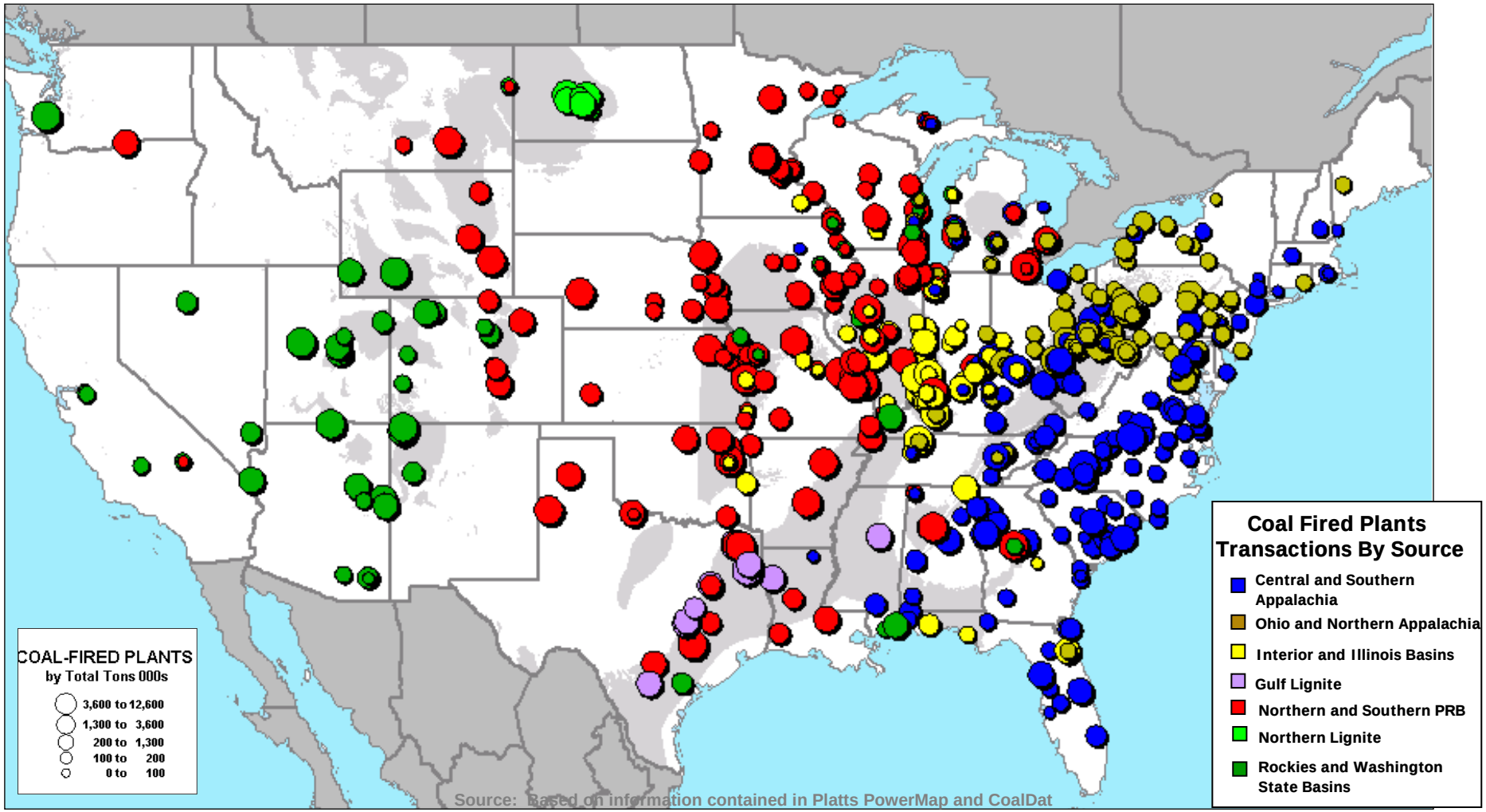
U.S. Generation Output



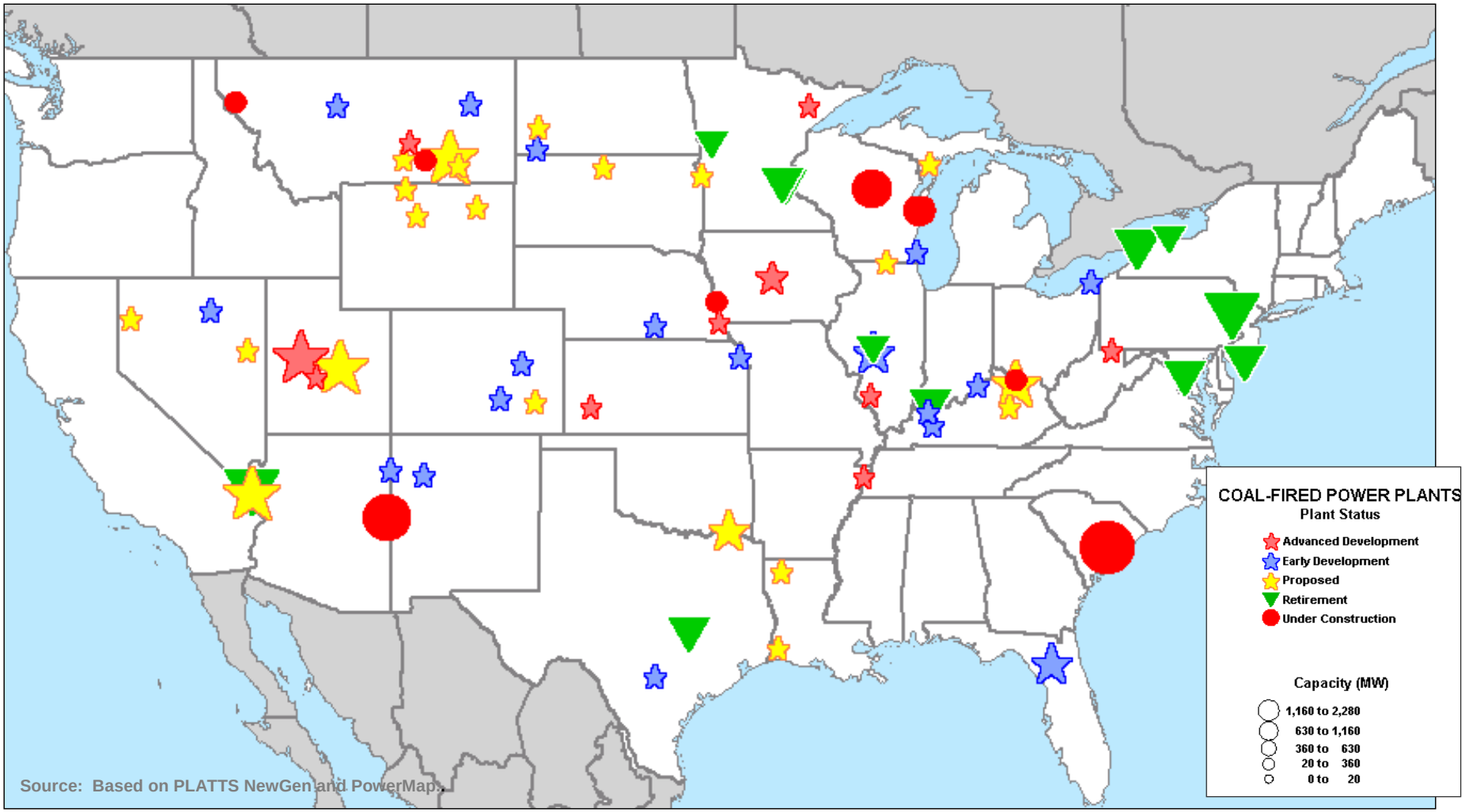
Where Does Coal Go? 1993



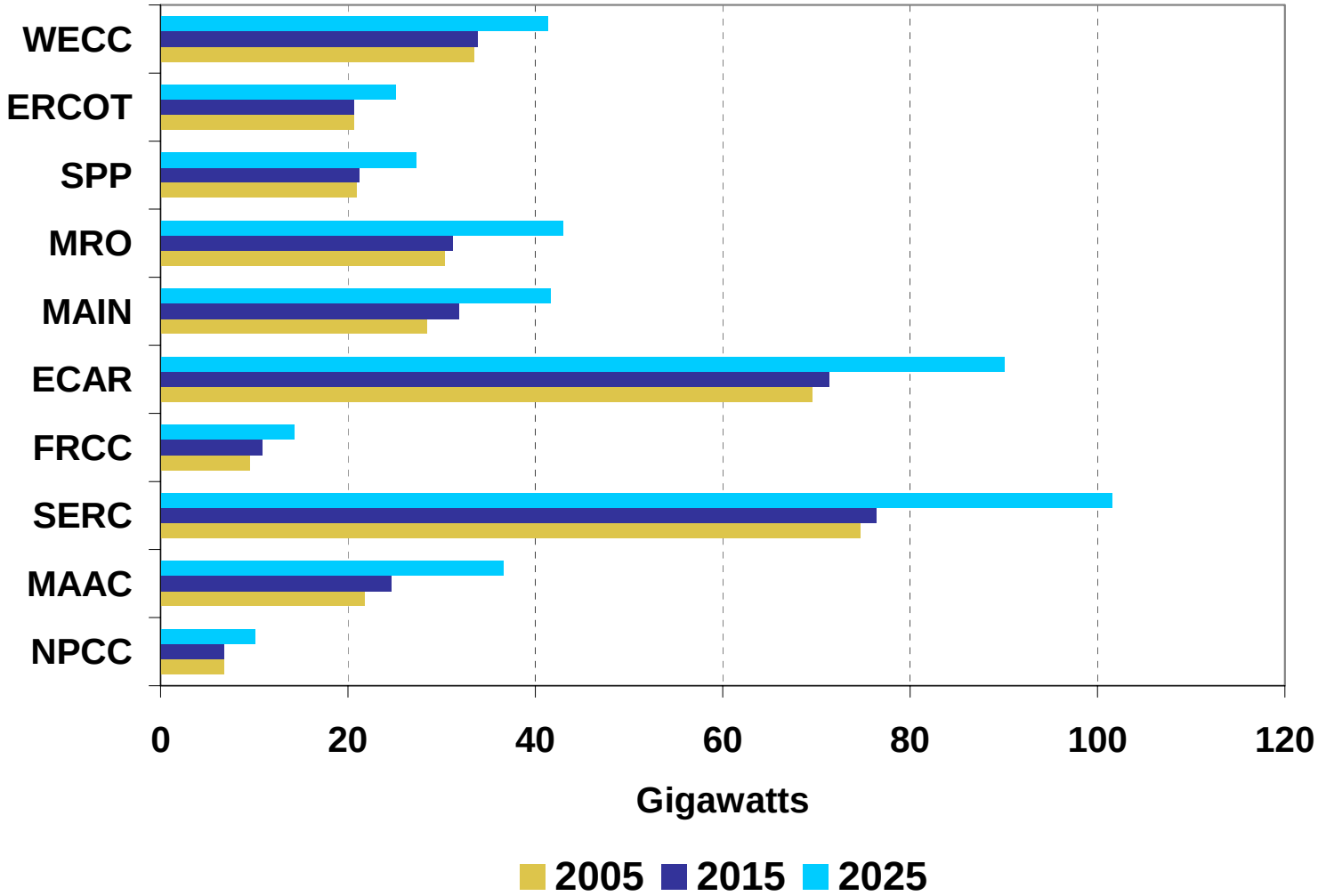
Where Does Coal Go? 2003



New Coal-fired Construction

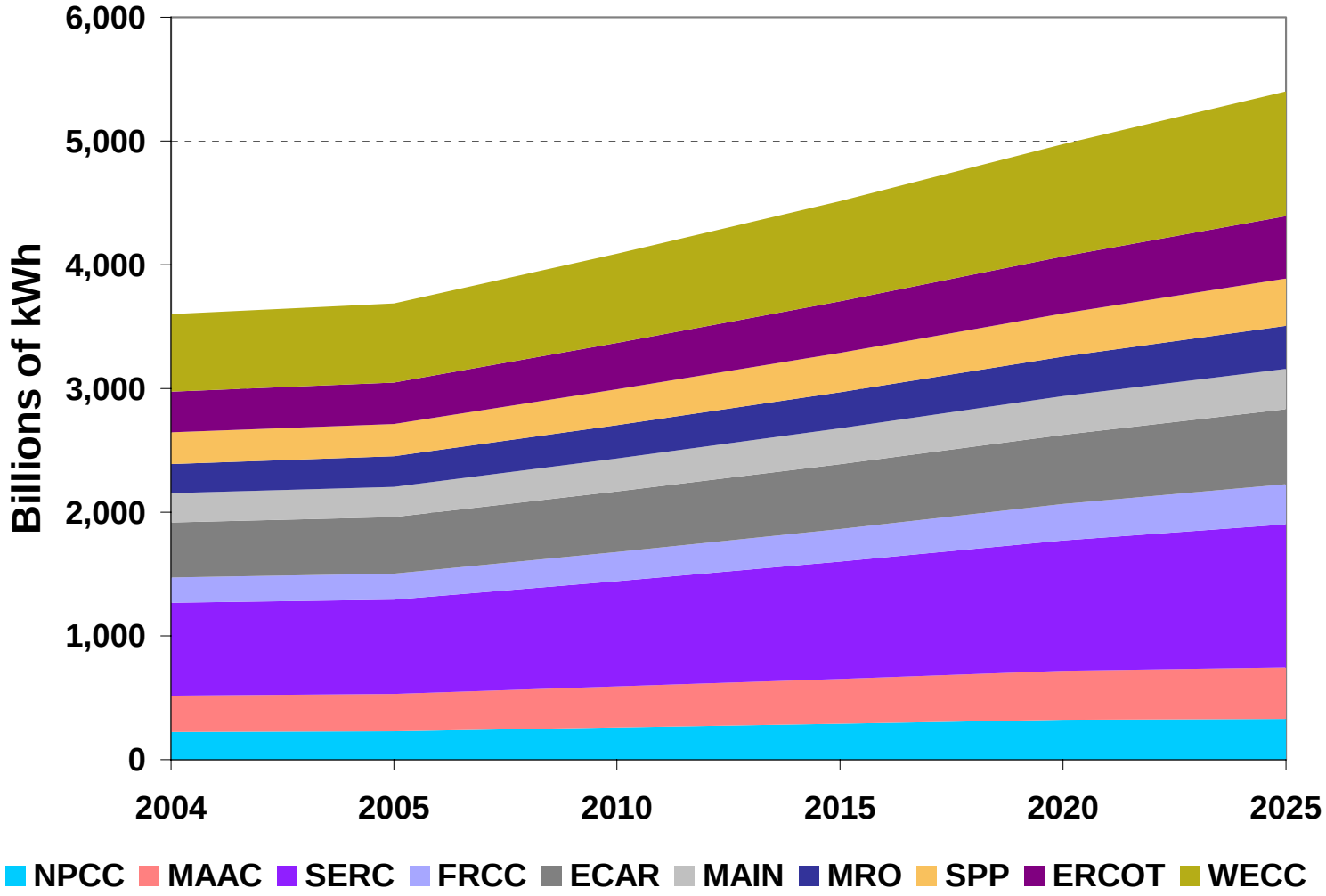


Expected Growth in Coal-fired Generation



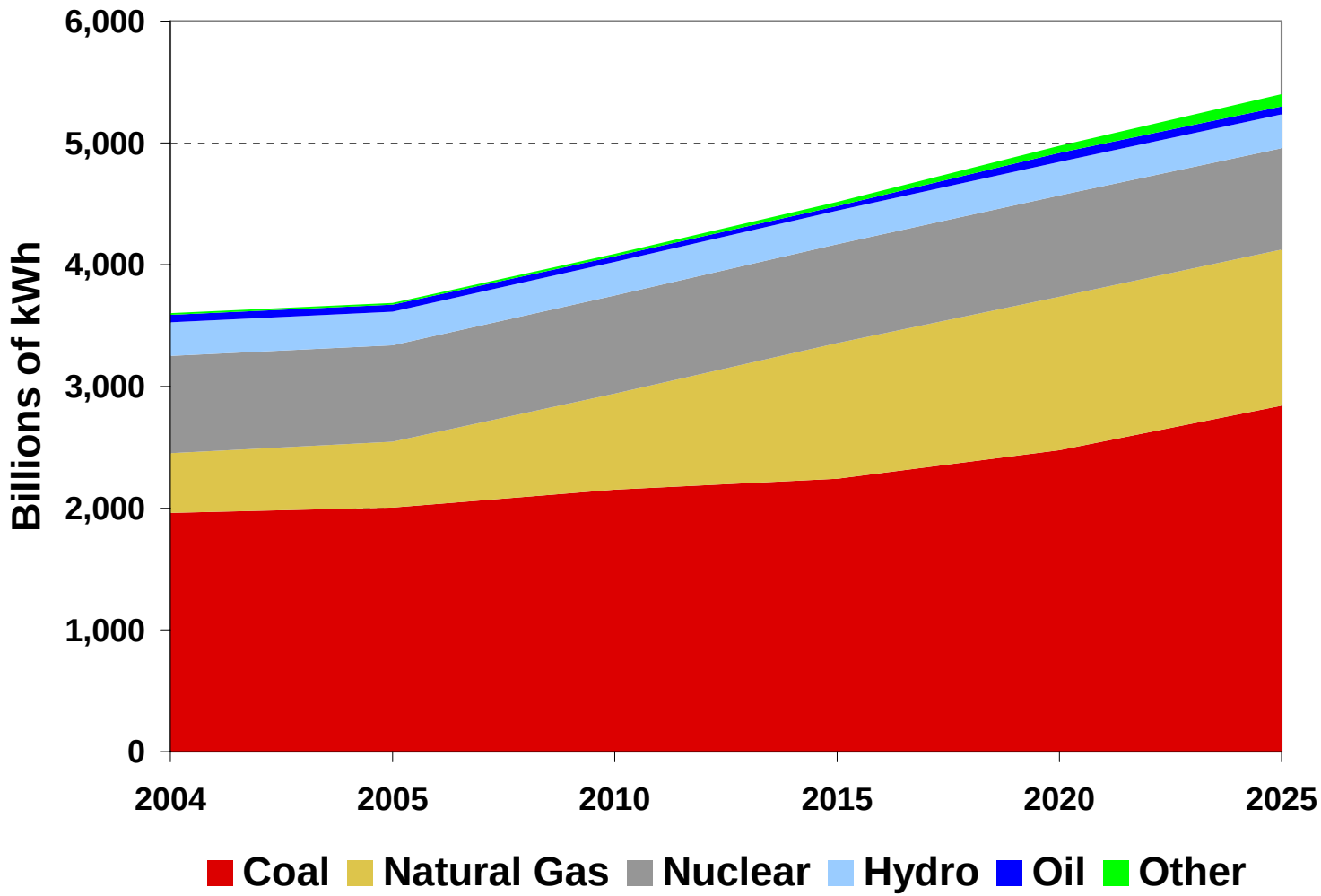
Source: Based on information from Energy and Environmental Analysis's (EEA) January 2005 data base.

Future Generation Output By NERC Region



Source: Based on information from Energy and Environmental Analysis's (EEA) January 2005 data base.

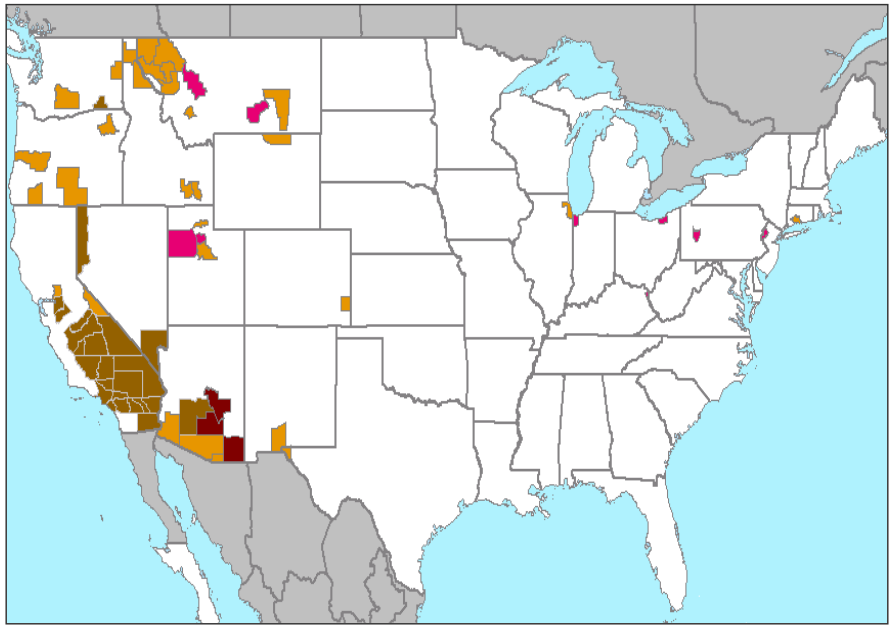
Future Generation Output By Fuel



Source: Based on information from Energy and Environmental Analysis's (EEA) January 2005 data base.

Air Quality Nonattainment Areas

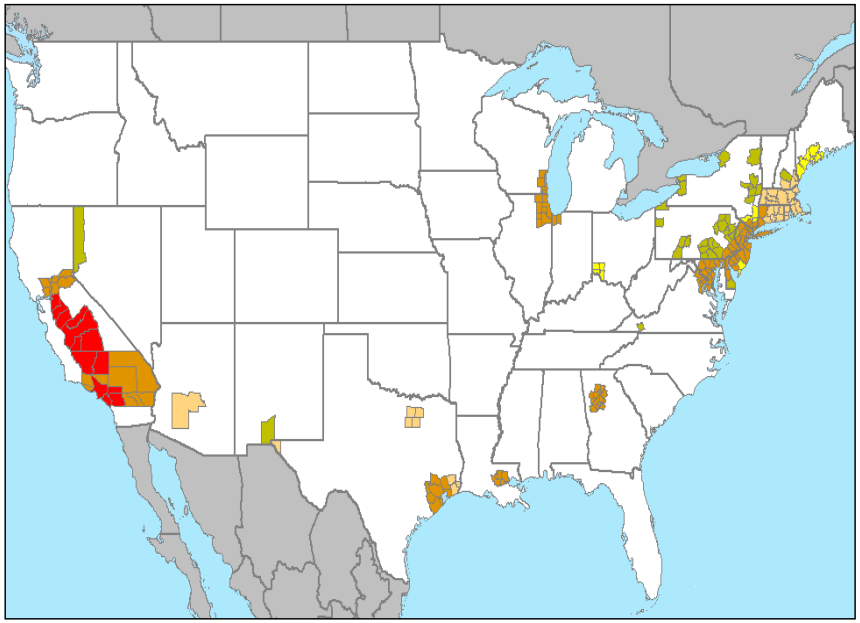
Counties Designated Nonattainment for SO2 and Particulate Matter



Particulate Matter

- SO2
- SO2 and Particulate Matter
- Moderate
- Serious

Counties Designated Nonattainment for Ozone

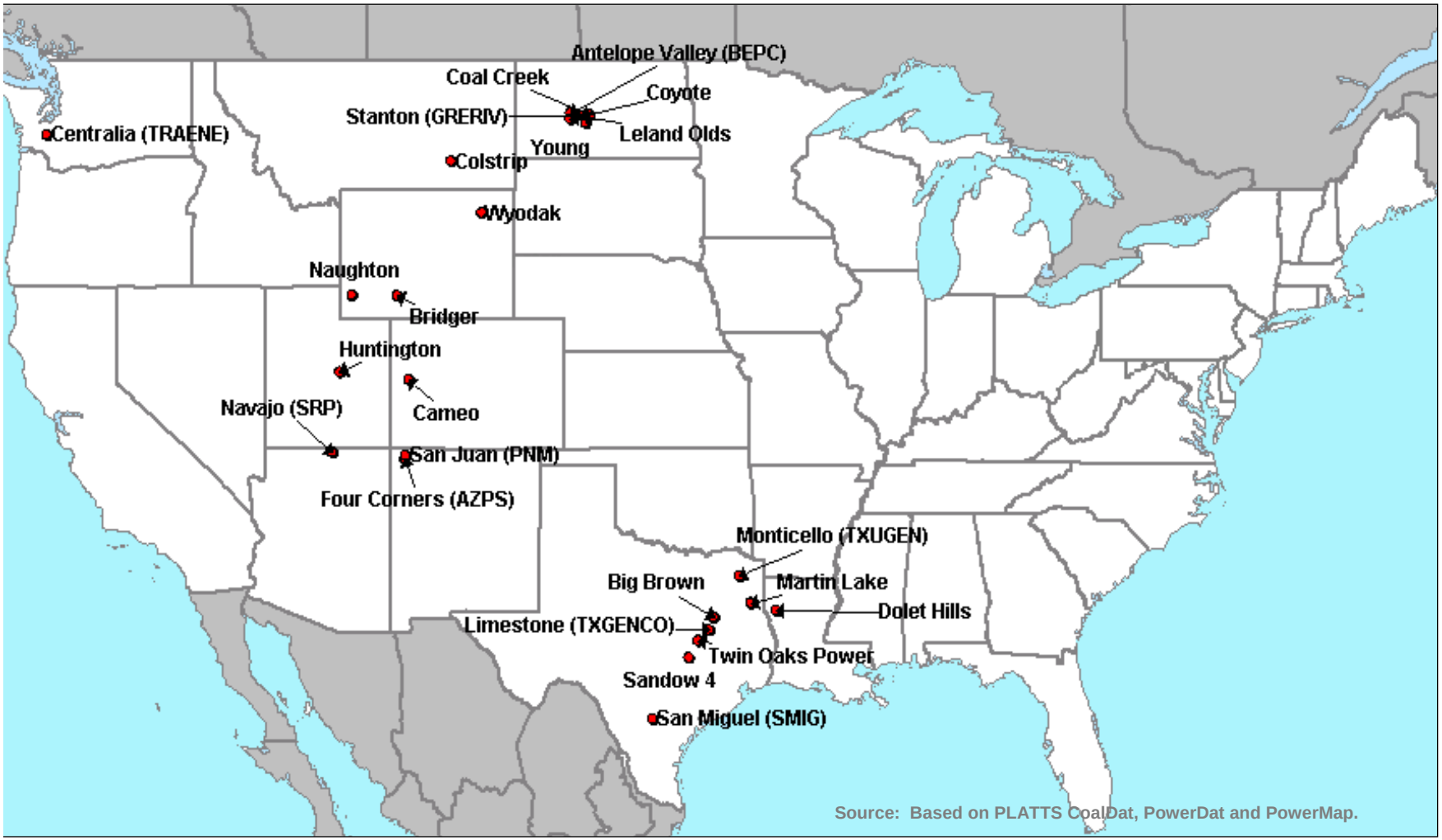


Ozone 1 hour

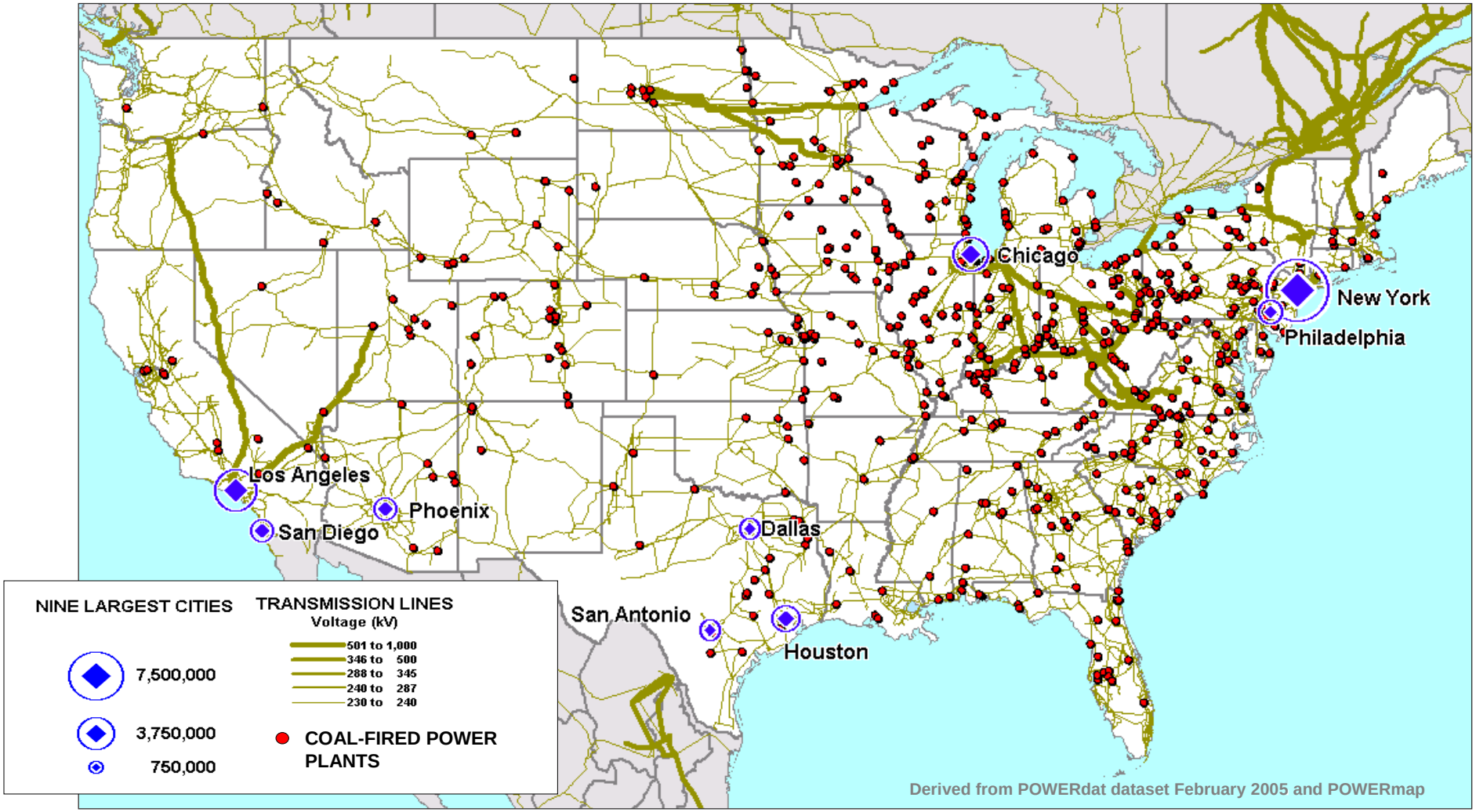
- Marginal
- Moderate
- Serious
- Severe
- Extreme

Source: EPA, PLATTS PowerMAp

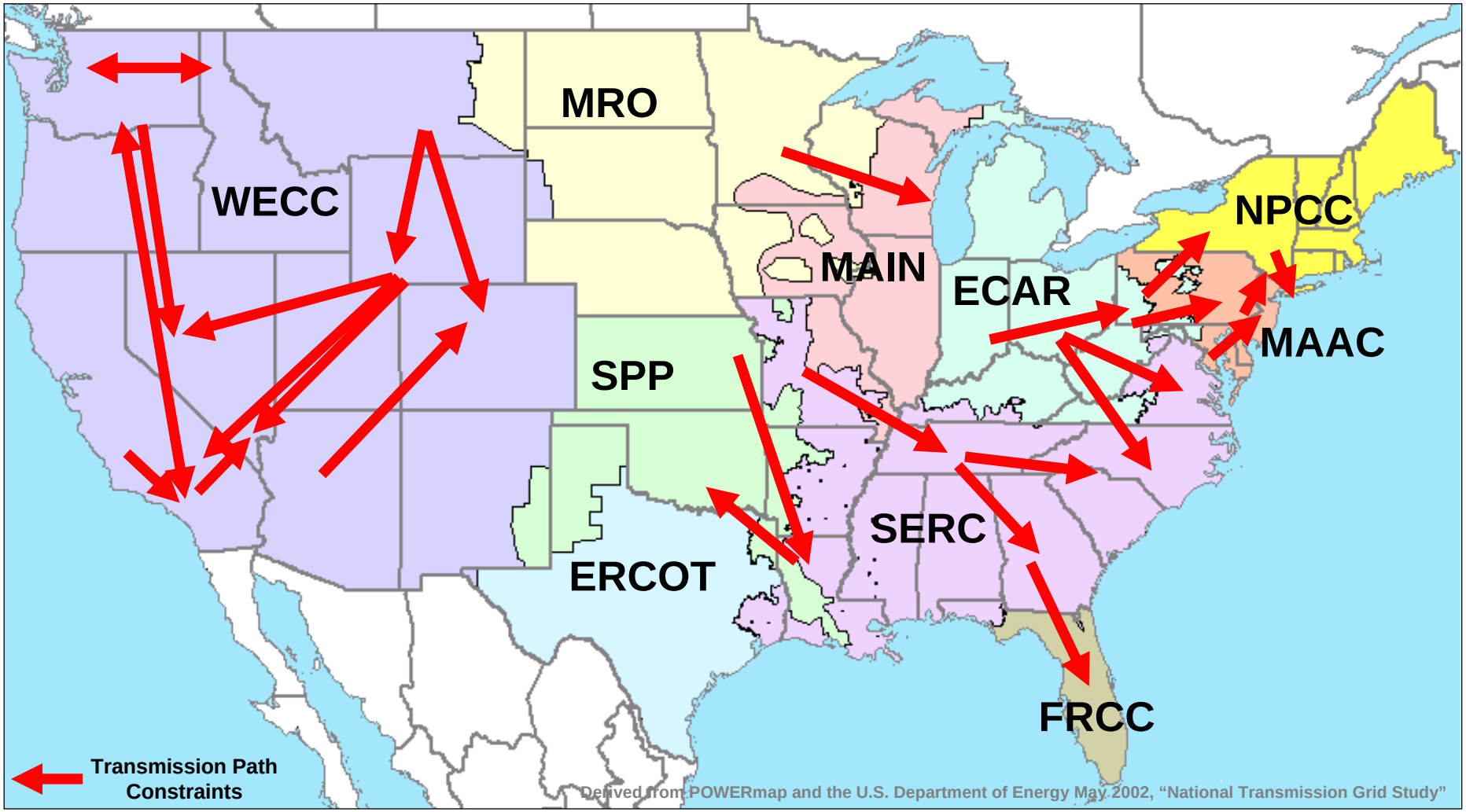
Mine-mouth Generation



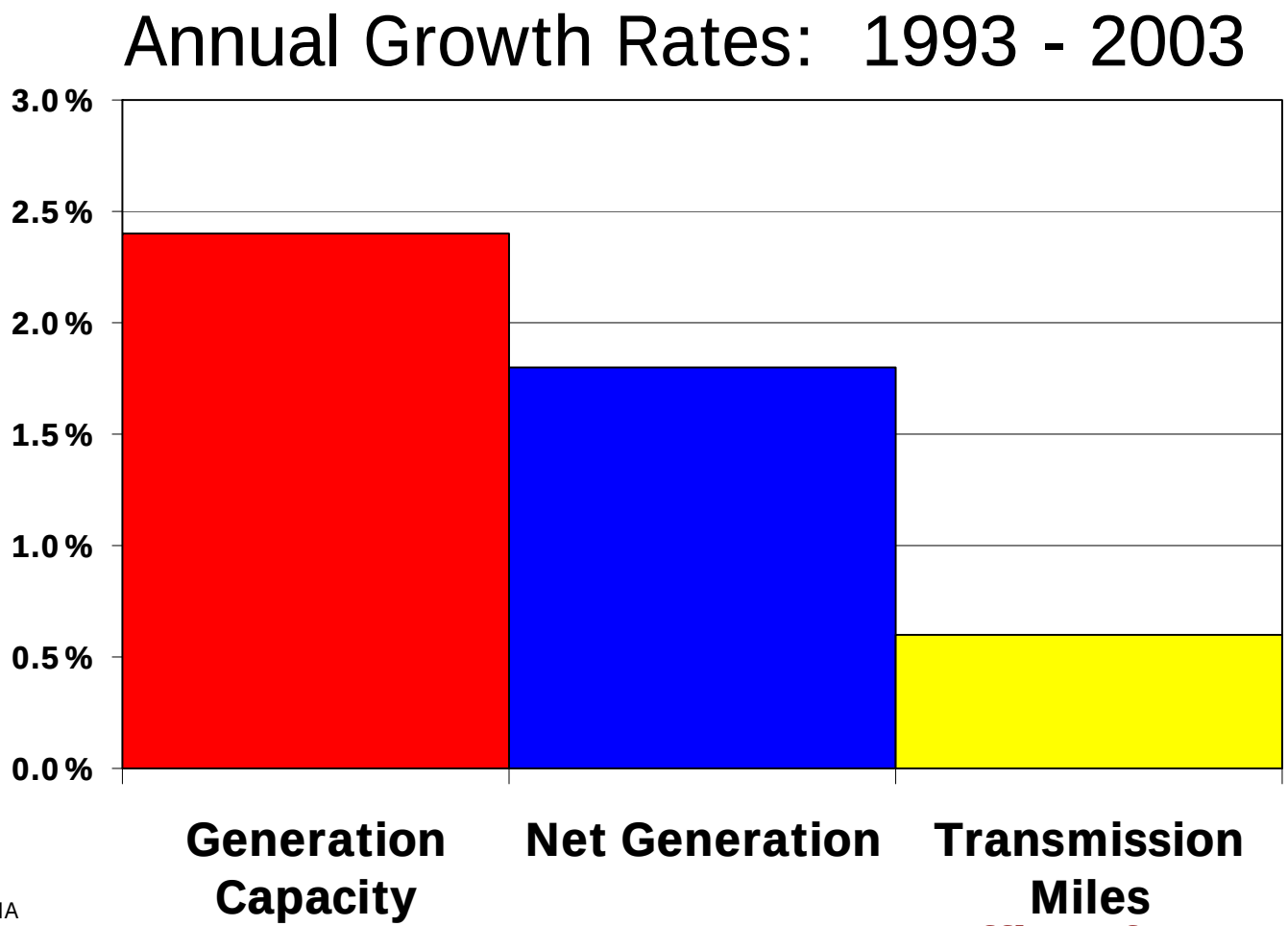
Bulk Electric Transmission System



Transmission Path Constraints

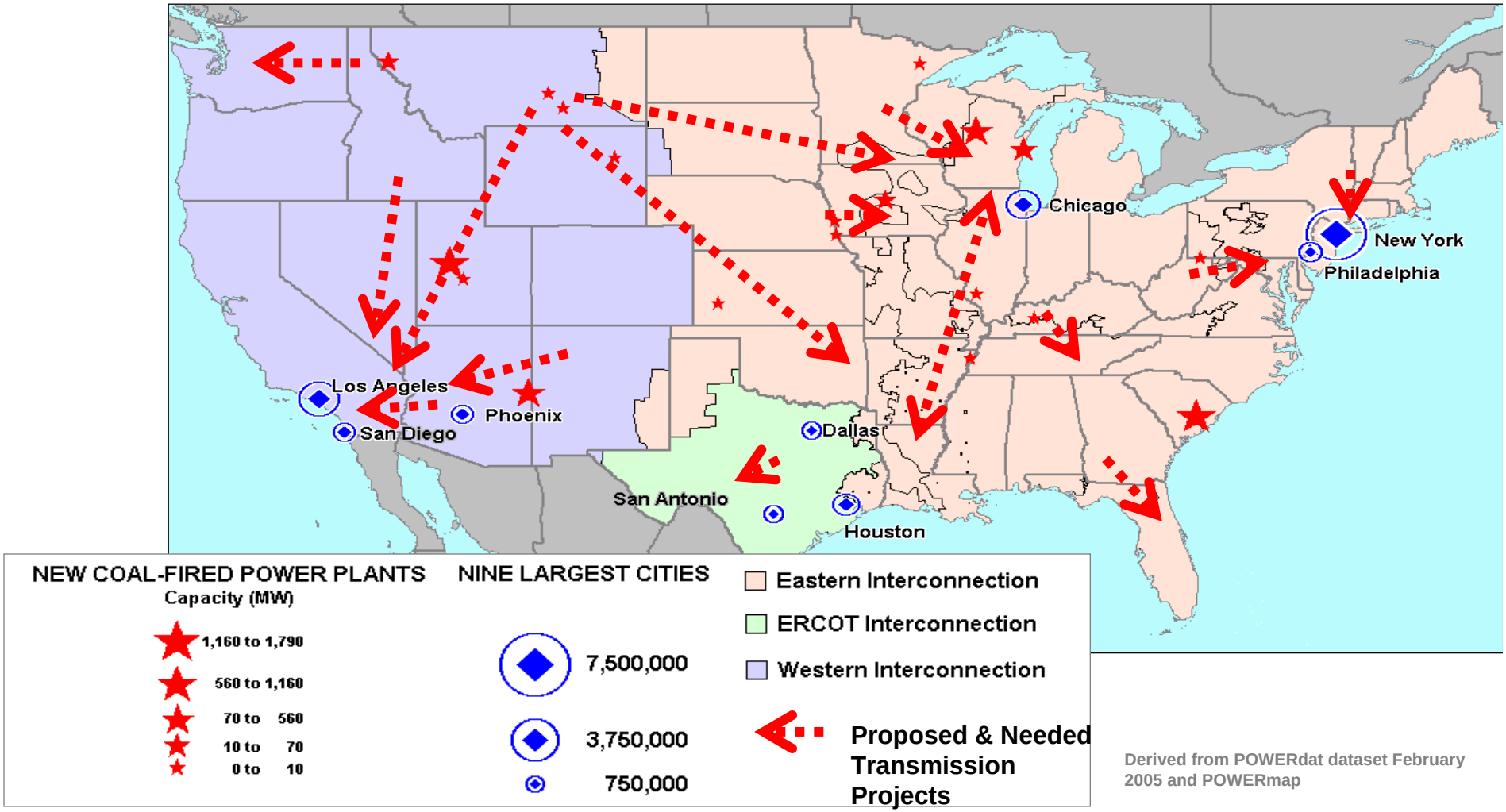


Electric Transmission: The Weakest Link?



Source: NERC, EIA

Additional Transmission is Needed

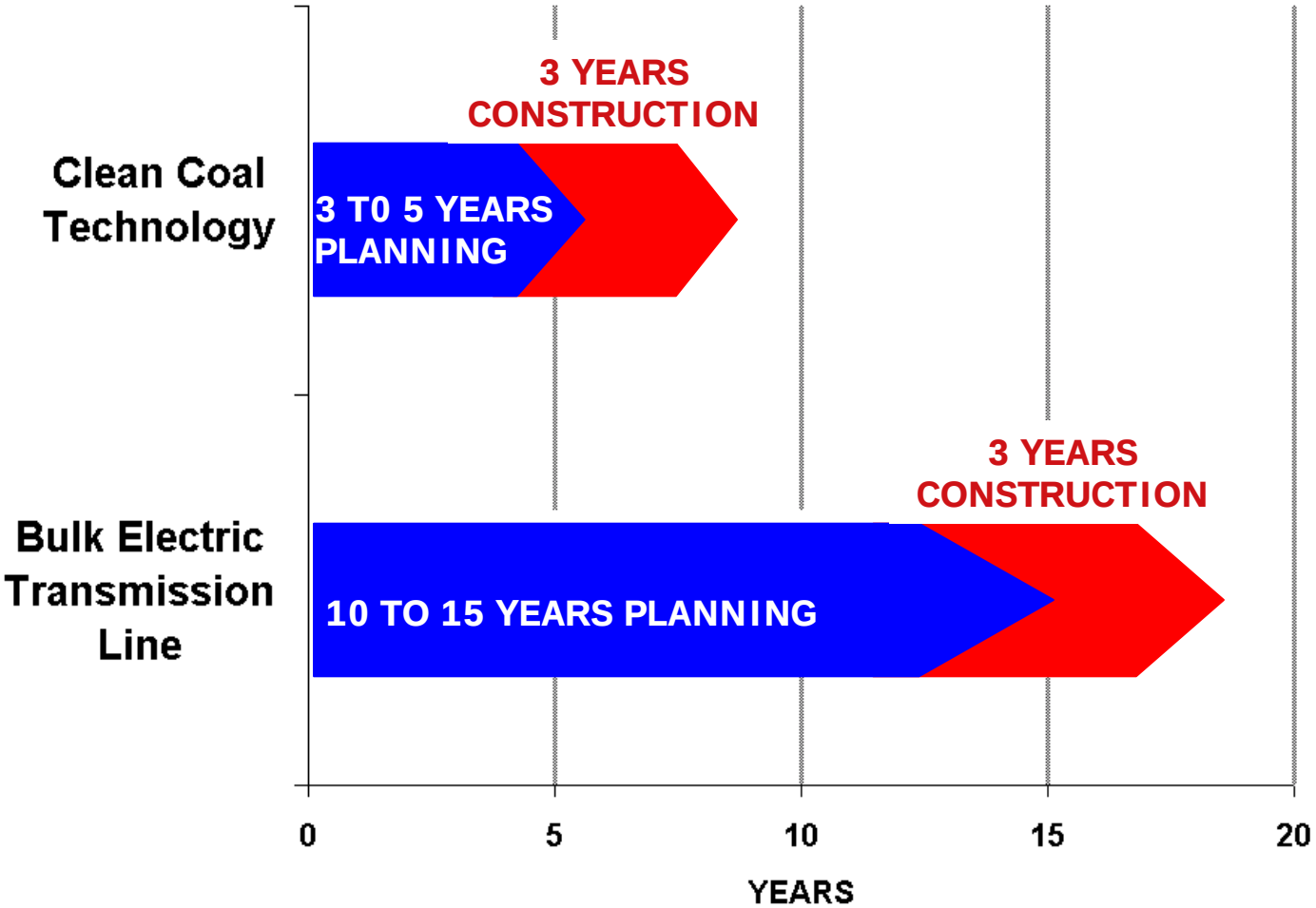


Derived from POWERdat dataset February 2005 and POWERmap

Impediments to new transmission

- Need
- Cost Recovery
- Planning
- Siting

Timing is Critical



Source: from trade press

Conclusions