



COAL NEWS

NEW ZEALAND

Enactment of the Crown Minerals Regulations 2007

The new Minerals Programme and the Crown Minerals (Minerals and Coal) Regulations 2007 both came into force from 1 February 2008. The government says these two statutory instruments provide both the Crown and industry with up-to-date and robust regulatory policy and practices that should enhance New Zealand's reputation as an attractive exploration destination for investment.

The new minerals programme provides an allocation regime which promotes the responsible discovery and development of Crown-owned mineral and coal resources. It builds upon the knowledge and experience gained since the existing minerals programmes were issued in 1996 and provides increased certainty and transparency in administering the Crown Minerals Act 1991.

The new regulations reflect changes required to better support both the proposed amendments to the current minerals programmes for minerals and coal and the Ministry's new on-line permitting and reporting system. Public consultation on the proposed regulation amendments was undertaken in 2006.

Significant amendments to the current regulations include:

- specifying fully up-to-date information and data requirements that applicants need to submit for permit applications and compliance reporting;
- amending the reporting period for the provision of summary activity and expenditure reporting for prospecting and exploration permits from a fixed date to one based on the anniversary of the commencement date of the permit;
- including requirements to standardize the information that a mining permit holder has to provide in an annual mining activity summary report; and
- providing for sufficient support and compatibility with the Ministry's new IT services.

A link will be provided on the Crown Minerals website to the electronic version of the Crown Minerals (Minerals and Coal) Regulations 2007 when they are posted on the Regulations of New Zealand website.

Eastern building processing plant at Nightcaps mine

Brisbane-based coal company Eastern Corporation Ltd has begun work on the design and building of a new 0.20M tonnes a year coal processing plant at its Takitimu mine in Western Southland.

Eastern says in its third quarter report that the new plant at its mine in Nightcaps will complement the existing processing facility which has been upgraded to 70,000 tonnes a year capacity.

The mine is building up production in line with demand. Stripping of the first block was completed during the quarter, exposing 50,000 tonnes of coal which has now begun to be mined. Stripping of overburden has commenced on the second block to the south east to expose the next 100,000 tonnes of coal.

The Takitimu mine permit has measured reserves of 2.6M tonnes. Eastern has a contract to supply the Fonterra dairy plant at Clandeboye in South Canterbury with approximately 130,000 tonnes of coal a year, beginning in September 2008.

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Eastern says that once the planned mine infrastructure improvements are in place focus will switch to devising exploration programmes for its Ohai Prospecting Permit to extend the sub-bituminous coal resource base at Takitimu.

Pike River looking for top-up of \$100M

NZX-listed company Pike River Coal is planning to raise \$100M of new equity and debt to complete its West Coast coal mine.

An underwritten renounceable rights issue to existing shareholders and noteholders would raise \$60M and shareholders would be asked to approve a debt issue of \$40M of convertible bonds to investment fund Liberty Harbour. The funding package would replace a mandate held by Westpac to provide \$65M.

Managing director Gordon Ward said the Liberty Harbour bond facility would have an interest rate of 6.75% and would provide certainty of funding and greater flexibility. It removes both the need for bridge finance until the proposed Westpac facility could be drawn and the requirement for a guarantee from NZOG [New Zealand Oil & Gas] which was not deemed appropriate or necessary given Pike River's status as a separately listed standalone entity.

The Westpac facility could not be drawn down until the mine tunnel - now 1.96 km long - had intersected with the coal seam. The expected coal intersection date had been moved back from late April to early July after the company decided to stop near the Hawera fault and construct pit bottom facilities with conventional drill and blast equipment.

Additional costs totalling \$13M related to a new long-term transport arrangement with Solid Energy, capital expenditure of \$11M related to tunnelling costs (notified to the market in September) and a refreshed contingency fund of \$11M. The total cost of the mine was expected to be about \$240M - about \$35M above that budgeted at the time of the initial public offer last year.

INTERNATIONAL NEWS

Coal fires past US\$100 mark (Australia)

In the first week of February, coal prices jumped to a record at Australia's Newcastle port, a benchmark for Asia, surging past US\$100 a tonne, as snowstorms in China, power cuts in South Africa and floods in Queensland reduced output. The price gained 73% last year.

China, reliant on coal for 78% of its power and with coal deliveries disrupted by snowstorms, will halt exports in February and March to boost domestic supplies. Anglo American closed South African mines in January on power shortages.

In Australia, the world's biggest coal exporter, BHP Billiton Mitsubishi Alliance, is among four miners that declared force majeure on deliveries after heavier-than-usual rain flooded pits. BHP Billiton said operations might be affected for as long as six months.

UBS AG, Europe's biggest bank by assets, on February 1 raised its forecasts for thermal coal contract prices for 2008 and 2009, citing the coal "crisis" in China and supply disruptions in Australia. Contract prices may rise to US\$100 a tonne this year and to US\$125 in 2009, up from previous estimates of US\$90 and US\$110, the bank said.

Slurry pipeline transport study results (Canada)

Fortune Minerals Ltd announced a summary of results from its preliminary economic assessment of the viability of transporting coal using a slurry pipeline from its proposed Mount Klappan anthracite coal mine in northwest British Columbia to the ports of Stewart and Prince Rupert.

This preliminary scoping study, conducted by Marston Canada Ltd. indicates that a slurry pipeline could materially reduce transportation costs to the ports as compared to the truck or rail transportation options evaluated in the company's positive full feasibility study completed by Marston in 2005. According to the scoping study report, such a pipeline may reduce operating costs by as much as 34%.

A slurry pipeline would also help mitigate the future impacts of increasing fuel and labour costs, and certain route options would reduce the environmental footprint of the proposed development by using existing transportation corridors.



Coal sector set to meet consolidation goals (China)

China has published a national coal industry policy that will increase consolidation of the coal industry sector. The National Development and Reform Commission (NDRC), the nation's top economic planning body, said China will build six to eight coal enterprises each with a capacity of 100M tonnes, and eight to 10 coal enterprises with a capacity of 50M tonnes.

These groups are expected to contribute more than half of China's coal output of 2600M tonnes in 2010. The country has started a nationwide campaign to close small coal mines.

Large coal enterprises are encouraged to develop other business, such as power generation and railway and port transportation, according to the industry policy. They are also encouraged to participate in other sectors such as the metallurgical, chemical, construction material and transportation industries.

Over 10,000 coal mines closed (China)

China closed 10,412 coal mines in the last three years amid efforts to improve workplace safety and to check extravagant use of natural resources.

The State Administration of Work Safety said another 1,100 coal mines must be shut soon as the government had ordered the closure of 11,618 coal mines by the end of 2007. The government had set a target of closing about 10,000 small coal mines from August 2005 to mid-2008. Such mines accounted for one-third of China's total coal output but two-thirds of the deaths from colliery accidents.

South China hit by power crunch (China)

Southern China has been hit by the worst energy crunch in five years, with large parts of the area's power-generating capacity left idle due to a coal shortage. The shortage was caused by a variety of factors including the closing of many small coal mines.

Coal shortages in southwest China have caused "the biggest capacity shutdown since the China Southern Power Grid Corporation was founded in 2002". Sichuan stockpiles had fallen to 0.813M tonnes, and officials are concerned that they would dip below the critical point of 0.7M tonnes.

Iron, cement, power units to get coal (India)

The coal ministry today decided to allot 92M tonnes of coal to ensure the much-needed long-term linkages to 236 sponge-iron plants, 73 cement manufacturing units and 224 captive power facilities.

The 236 sponge-iron units with a total production capacity of 42M tonnes located in 13 states have been sanctioned long-term linkages of 19M tonnes of coal per annum. About 194 units had already started producing 10M tonnes of sponge-iron annually, while another 42 with a capacity of 4M tonnes would be commissioned soon.

A total of 73 cement plants located in 14 states with an annual capacity of 117M tonnes have also been granted long-term linkage of 21.4M tonnes a year. Of these cement manufacturing units, 43 are being expanded to contribute 56M tonnes, while another 30 are greenfield projects with projected capacity of 61M tonnes.

Following the notification of a new coal distribution policy recently, the coal ministry has taken a liberal view on granting long-term coal linkages. The new policy provides for Coal India Ltd to import coal if required to meet its linkage commitments, in the wake up of rising coal demand in the country.

Tata, SAIL form equal venture for coal (India)

Tata Steel Ltd and Steel Authority of India Ltd (SAIL) announced an equal joint venture to acquire and develop coal blocks in India. The joint venture has identified four coking coal blocks in the eastern state of Jharkhand with reserves of about 600M tonnes.

India's steel output is expected to more than double in the next five years to 124M tonnes from 56M tonnes estimated in the financial year ending on March 31. The joint venture will initially start with a small investment of US\$0.5M for the purpose of identifying suitable blocks, but as soon as they start work on any block the investment would be ramped up.

Coal India may go public within 2 years (India)

Coal India is likely to go for an initial public offer (IPO) once it is conferred the status of a Navratna company, expected to be some time in 2009 or 2010.



The percentage of government's stake dilution or the quantum of money to be raised has not been decided or discussed at this stage. The coal company has been given the responsibility of meeting the nation's entire demand for coal and has been asked by the government to increase coal production by 159M tonne.

Government seeks greater role of private companies (India)

The government is looking for more private players in the area of coal exploration to meet the production target for the Eleventh Five Year Plan (2007-12). The government had already allotted 170 coal mining blocks to the public and private sectors, with proven reserves of 38 billion tonnes.

Bumi eyes 50% stake in coal project (Indonesia)

PT Bumi Resources is eyeing a 50% stake in the country's first coal liquefaction project, which will involve a total investment of US\$1.3 billion.

The on-going phase of the project, which the government calls semi-commercial, is run by a consortium made up of local coal producers, including Bumi. The consortium has been conducting a feasibility study since August, and is expected to complete it soon.

The project, which will have a total capacity of 13,500 barrels per day, is scheduled to start the construction in 2009 and production in 2013. The project would be followed with a commercial plant with a double-capacity. This commercial project is estimated to need an additional investment of \$800M.

Based on the government's plans around the coal liquefaction project, the plant will be built in the Arutmin mining concession in Satui, South Kalimantan.

PLN halts Cilacap operations (Indonesia)

PT Perusahaan Listrik Negara (PLN) will halt operations at one of its coal-fired power plants due to coal shortage after bad weather delayed coal shipments. The plant is located in the Central Java town of Cilacap while coal supply comes from Kalimantan.

PLN will optimize power output from other plants that use fuel oil to cover the shortfall that would arise from the Cilacap shutdown. PLN has recently halved the power output from both the Cilacap plant and the Tanjung Jati B plant due to coal shortage. The two plants have a combined capacity of 1960 MW.

Timah looking to acquire coal mine (Indonesia)

PT Timah is scouting around for coal mines because of depleting reserves at its Kalimantan mine.

The firm had set aside US\$212M to buy mines anywhere in the country with deposits of 50M tonnes. Their coal reserves can last for another two-three years and they are looking for the most optimal coal mines to acquire.

Timah has a mine in South Kalimantan which produces up to 1.4M tonnes of coal a year, but the company is aiming to sell 1.8M tonnes in 2008 to Japan, India and Korea.

Coal power to ease crisis (Philippines)

Four companies have formed a consortium to construct a US\$450M coal-fired power plant in Toledo City to address a looming power crisis in Cebu. The 246MW power plant is expected to be fully operational in early 2010.

The business sector welcomes the plan of the Cebu Power Corp. (CPC) to build and operate a 246-MW power plant in Barangay (village) Sangi, Toledo as it will sustain the business in the province and increase investor confidence.

The consortium officials also assured that the power plant will also use clean coal technology. The CPC is composed of Aboitiz Power Corp., Formosa Heavy Industries Corp., Global Business Power Corp. and Vivant Power Corp.

SK signs deal for Australian coal mine (South Korea)

South Korea recently signed a US\$72M deal for a 10% stake in an Australian coal mine. Under the deal, a South Korean consortium led by KORES (Korea Electric Power Corp and its four utilities) will buy the stake from Felix Resources and annually secure 2.8M tonnes of coal from 2009 from the Moolarben mine in New South Wales.

The consortium will be able to obtain coal at cost of about half the current market price. Coal demand in South Korea is predicted to grow 7% annually, requiring another 15M tonnes a year by 2010.



According to KORES, market prices for coal were set at US\$60/tonne for bituminous coal as of December of 2007. Measured, indicated and inferred resources at Moolarben are estimated at 226M tonnes.

BKW buys stake in coal plant (Switzerland)

BKW FMB Energy Ltd of Switzerland will acquire a 33% share in a coal-fired power plant to be operated by Electrabel for US\$631M.

Electrabel, a unit of French utilities giant Suez, is currently planning to build coal-fired power plants in three locations and BKW said its interest was for a plant in Wilhelmshaven, in Northern Germany. With the investment, BKW aimed to strengthen its production capacities and support its sales activities in Germany.

Coal power station plans backed (UK)

Plans have been backed to build Britain's first coal-fired power station in more than 20 years. Energy giant E.on UK sought permission from Medway Council to replace existing coal-fired units at Kingsnorth power station in Medway, Kent.

The £1 billion investment to build two new cleaner coal units would produce power from coal more efficiently and more cleanly than ever before in the UK. The units would produce enough energy to supply about 1.5M homes and lead to a cut in carbon emissions of almost 2M tonnes a year.

Appalachian coal heat up (USA)

Surging Asian demand has been good news lately for coal-mining firms in Appalachia. Coal prices in the eastern U.S. have soared about 25% since mid-August, due largely to China's and India's need for coal to generate electricity and make steel.

With those two countries burning up the supply of coal mined in South Africa, Australia and throughout Asia, European and South American buyers have turned to the U.S. The price of low-sulphur, central Appalachian coal shipped by barge for delivery in the next month has shot to \$56 a tonne, from around \$44 in August.

Coal terminal shutdown roils Atlantic trade (USA)

The shutdown of a U.S. coal terminal has sent some European buyers in search of backup supplies and has heightened concern about U.S. ability to meet surging export demand, industry officials say.

CONSOL Energy temporarily shut down its export terminal at Baltimore, Maryland, in January because of apparent weakening of a portion of a coal-loading pier. Early estimates are that repairs will take a month.

The other major eastern U.S. coal export centre, southern Virginia, has more capacity than Baltimore, but U.S. coal for export already was in tight supply. Officials say U.S. steam coal exports could double to 20M tonnes. Total U.S. production is more than 1 billion tonnes a year.

Europe needs U.S. coal to make up shortfalls because supplies from South Africa and elsewhere have been diverted to booming Asia or hobbled by infrastructure problems. Prices have skyrocketed, making U.S. coal more affordable.

Companies try to anticipate carbon capture future (USA)

Basin Electric Power Cooperative is building its first new power plant in 25 years and there's a blank space in the blueprints.

The blank is an eight-acre area at the Dry Fork Station near Gillette, Wyo., where Basin broke ground on a 385MW plant two months ago. Someday, it will contain equipment to capture carbon dioxide from the Dry Fork emission stack.

TECHNOLOGY & OTHER NEWS

BP plans to boost clean coal technologies in China

BP announced during a ceremony in the Great Hall of People in Beijing that it had signed a series of agreements to enhance its commitment to China for more strategic integration and commercialization of clean coal conversion technologies.



BP and the China Academy of Sciences signed an agreement to undertake a feasibility study into a proposed Clean Energy Commercialization Centre joint venture. This represents a major step forward following the signing of a Memorandum of Understanding in Shanghai in August 2007.

Under the agreement, CECC is intended to integrate individual clean energy related technologies — coal gasification, coal to liquids, coal to chemical, carbon capture and storage, coal bed methane and underground gasification — from CAS institutes and other organizations both within and outside China, into competitive integrated feedstock manufacturing and product distribution systems and solutions such as polygeneration complexes.

The CECC would also serve as an international platform to foster collaboration among research institutes, enterprises and other institutions to improve indigenous Chinese innovation capabilities and market applications in areas such as clean coal conversion, zero emission and carbon capture and storage.

CO2CRC and partners start world first capture projects

The Australian Cooperative Research Centre for Greenhouse Gas Technologies (CO2CRC, including a NZ government industry consortium) is running two capture projects in Victoria focusing on cutting brown coal greenhouse gas emissions – one involving pre-combustion and one post-combustion. While the capture activities will initially revolve around brown coal generators, the results will be equally relevant to black coal and natural gas fired power plants.

The pre-combustion CO₂ capture project will trial technologies capable of making significant cost savings in the removal of CO₂ from brown coal power generation. CO2CRC is conducting the trial in association with Victorian based energy technology company HRL Developments. “CO2CRC’s capture technology, which has been patented, will be trialled at HRL’s research gasifier along with other solvent based, membrane and adsorption capture techniques,” according to CO2CRC.

A CO2CRC, Loy Yang Power, International Power and CSIRO project is set to establish Victoria as a world leader in post-combustion emissions capture research. The Latrobe Valley Post-Combustion Capture Project is Australia’s and possibly the world’s first research hub to fast track the maturity of technologies that capture greenhouse emissions from brown coal power stations. “This is the only project in the world to combine all of the CO₂ separation techniques in the one location on real plant gases,” said CO2CRC.

Both projects were made possible with grants from the Victorian Government’s Energy Technology Innovation Strategy Brown Coal R&D Program and utilises the research expertise of CO2CRC core participants, Monash University and the University of Melbourne.

Victorian Government releases CCS legal framework paper

The Victorian Government has released a discussion paper outlining the potential legal framework and regulations for operating Carbon Capture and Storage (CCS) processes in Victoria.

The Minister for Energy and Resources said the paper was developed to generate community debate and feedback to ensure that Victoria adopted a legislative framework for CCS that provided certainty to investors and reassurance to the community that the technology can be used safely and with proper checks and balances.

DOE announces restructured approach for FutureGen

At the end of January, the US Department of Energy (DOE) announced a restructured approach to its FutureGen project that aims to demonstrate cutting edge CCS technology at multiple commercial scale Integrated Gasification Combined Cycle (IGCC) clean coal power plants.

Under this strategy, the DOE will join industry in its efforts to build IGCC plants by providing funding for the addition of CCS technology to multiple plants that will be operational by 2015.

This approach builds on technological R&D advancements in IGCC and CCS technology achieved over the past five years and is expected to at least double the amount of CO₂ sequestered compared to the concept announced in 2003. Clean coal technology is considered a vital component of the Bush Administration’s vision for a cleaner, more secure energy future and this more cost effective approach will demonstrate IGCC-CCS clean coal technology to enable wider use and commercialisation more rapidly.

The DOE has issued a Request for Information that seeks industry’s input by March on the costs and feasibility associated with building clean coal facilities that achieve the intended goals of FutureGen. Following consideration of industry comment, DOE intends to issue a competitive tender to provide federal funding under cooperative agreements



to equip IGCC (or other clean coal technology) commercial power plants that generate at least 300MW, with CCS technology aimed at accelerating near term technology deployment. The FutureGen Alliance's 13 member companies may compete with all the other applicants.

CO₂CRC undertakes aquifer study for IEA

CO₂CRC is undertaking a comprehensive study on the storage of CO₂ in saline aquifers for the International Energy Agency Greenhouse Gas R&D Programme. Deep, non-potable, saline aquifers potentially provide a vast storage capacity for industrial emissions of CO₂. The study, which is expected to bridge some of the knowledge gaps related to aquifer storage identified by the IPCC in 2005 in its Special Report on Carbon Capture and Storage, will lead the way to the commercial use of saline aquifers as storage reservoirs. A draft report will be delivered to the IEA at the end of July.

Siemens, E.ON to develop pilot CO₂ capture plant in Germany

Siemens and E.ON have announced they are to cooperate on a new process to remove CO₂ emissions in power generation. In a joint statement, the groups said they would set up a pilot plant in Germany by 2010 to further develop the process up to 2014. The companies plan to test a solvent with special characteristics that will capture CO₂ from flue gases.

E.ON to build high efficiency coal fired power plant

E.ON intends to build the world's first hard-coal-fired power plant with a thermal efficiency of more than 50%. Plans call for the unit, which will have a capacity of at least 400 MW, to enter service in 2014 at a site in Germany. The plant requires the development of special materials that can withstand higher temperatures and pressure.

CCS may become routine in Europe

New power stations across Europe could be routinely fitted with CO₂ capture and storage technology within two years under a proposal by the European Commission. The commission is proposing a directive on geological storage of CO₂ that will require all new fossil fuel combustion plants to have "suitable space on the installation site for the equipment necessary to capture and compress CO₂".

UK government calls for proposals to demonstrate CCS

The UK government has announced a competition to develop the UK's first full-scale CCS demonstration project. The project must cover the full chain of CCS technology (post combustion capture, transport and storage) on a commercial scale coal-fired power station; it should store around 90% of the CO₂ produced in geological storage sites and should be demonstrated by 2014. Support provided by the government will be up to 100% of the additional capital and operating costs incurred in successfully demonstrating the technology at a commercial scale and on a long term basis.

UK Energy Bill 2008

The UK government 2008 Energy Bill has confirmed significant developments in the government's policy on carbon capture and storage (CCS), with steps to create a solid legal and regulatory framework for CCS. The Bill outlines licensing terms for the development and operation of new offshore CO₂ storage facilities.

EVENTS

3-4 April 2008, 1st World Coal-to-liquids Conference, Paris, France, Tel: + 33 (0)1 53 85 82 74, Fax: + 33 (0)1 53 85 82 8, Internet: www.world-ctl2008.com/

5-8 May 2008, 7th annual carbon capture & sequestration conference, Pittsburgh, PA, USA, Cheryl Joe, Exchangemonitor, 4455 Connecticut Ave NW, Suite A700, Washington, DC 20008, USA, Tel: +1 865 966 7124, Fax: +1 865 966 7231, Email: carbonsq@exchangemonitor.com

26-27 Jun 2008, International experts' workshop on mercury emission from coal, Newcastle, NSW, Australia, Prof. Terry Wall, Chemical Engineering, University of Newcastle, Newcastle, NSW 2308, Australia, Tel: +61 2 4921 6179, Fax: +61 2 4921 6920, Email: Terry.Wall@newcastle.edu.au

19-23 Oct 2008, 12th Australian coal preparation conference: cleaning coal to secure our future, Darling Harbour, NSW, Australia, Australian Coal Preparation Society National & NSW, PO Box 2315, DANGAR NSW 2309, Australia, Tel: +61 02 4926 4870, Fax: +61 02 4926 4902, Email: acpsnational@acps.com.au, Internet: www.acps.com.au



16-20 Nov 2008, 9th international conference on greenhouse gas control technologies, Washington, DC, USA, John Gale, IEA Greenhouse Gas R&D Programme, Orchard Business Centre, Stoke Orchard, Cheltenham, GL52 7RZ, UK, Tel: +44 1242 680753, Fax: +44 1242 680758, Email: johng@ieaghg.org, Internet: mit.edu/ghgt9

FEEDBACK

*This e-Newsletter is published for the Coal Association of New Zealand Inc. by CRL Energy Ltd.
We value your feedback on issues discussed in this e-Newsletter.
For comments or enquiries about specific articles, please contact:*

*The Editor
CRL Energy Ltd
PO Box 31-244 Lower Hutt
Phone: 04 570 3715
Fax: 04 570 3701*

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