



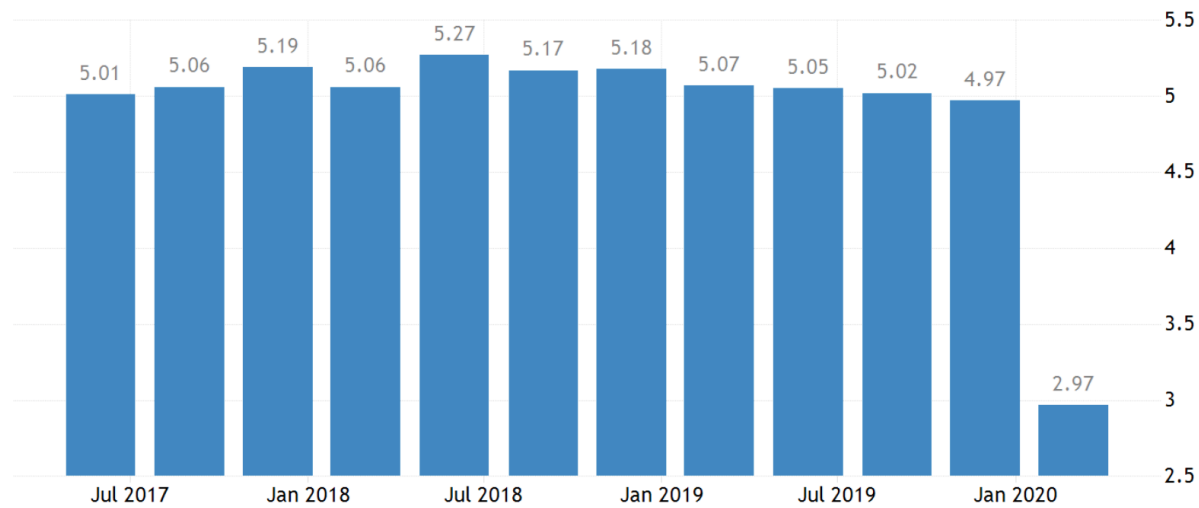
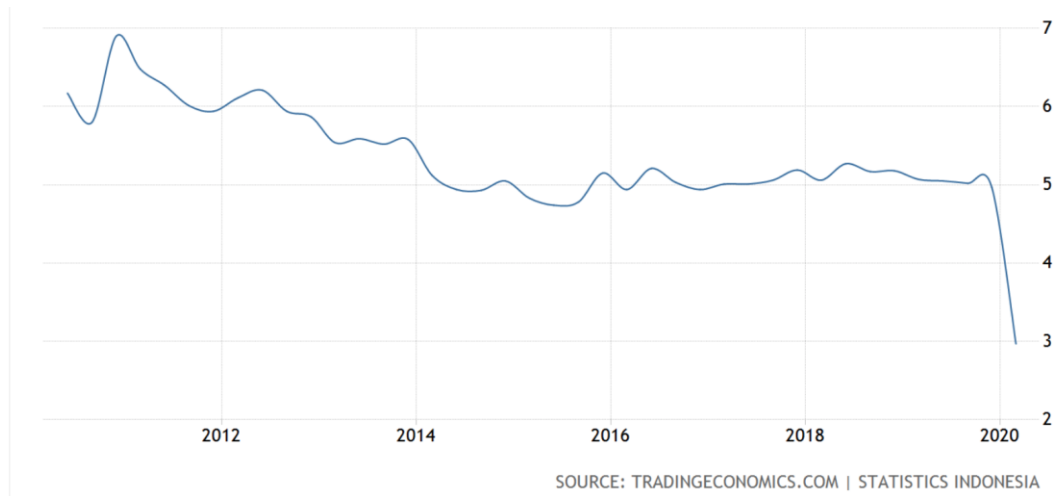
PASAR BATUBARA DI TENGAH PANDEMI COVID – 019
KEMANA INDONESIA BERSIKAP?

Oleh : **Singgih Widagdo**
INDONESIA MINING & ENERGY FORUM

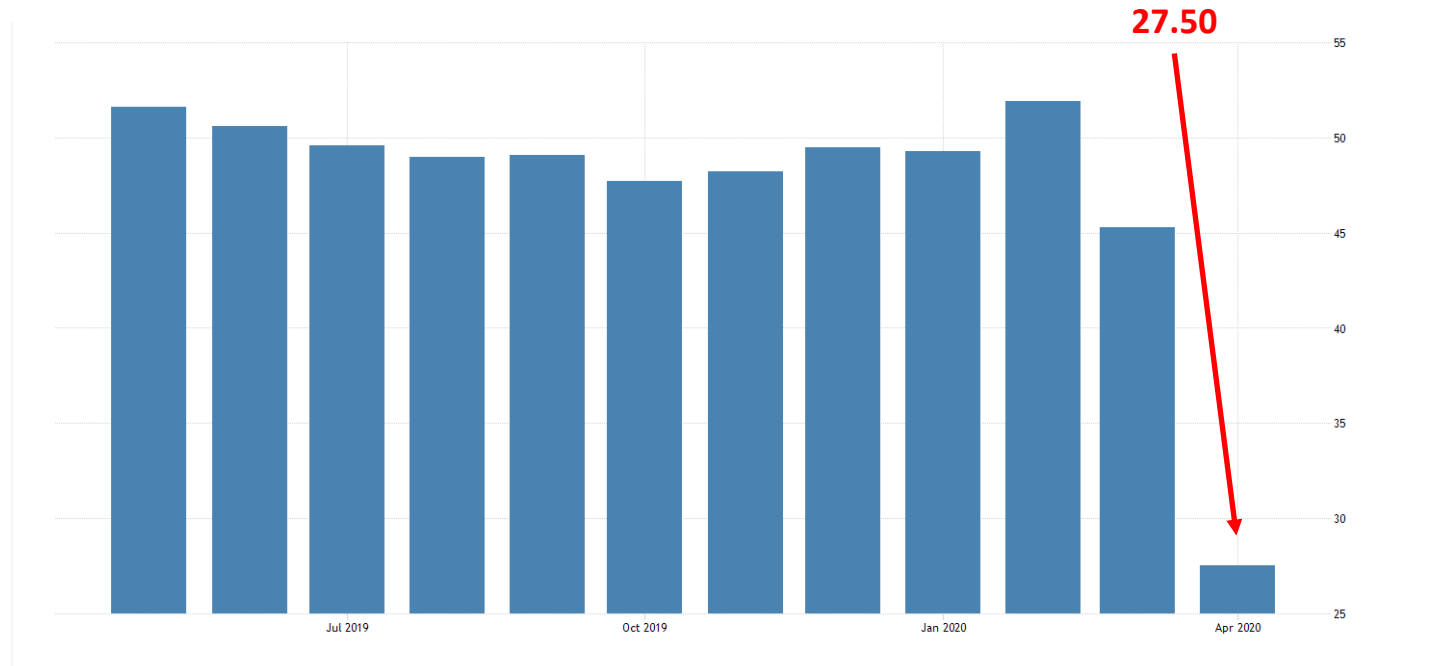


Jakarta, 8 Mei 2020

Ekonomi Indonesia Akibat Pandemi C-19

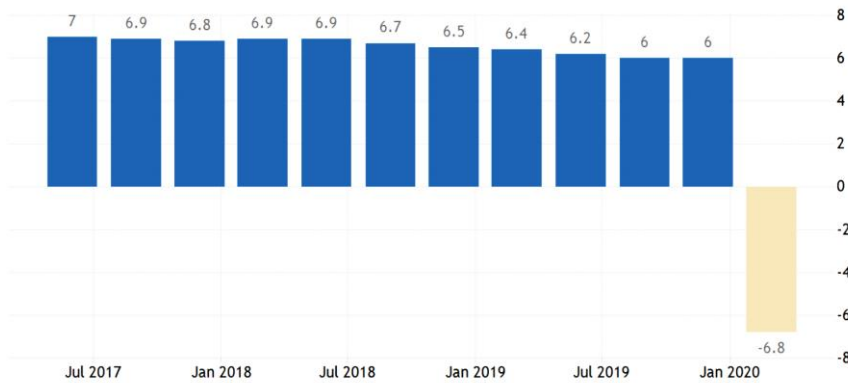
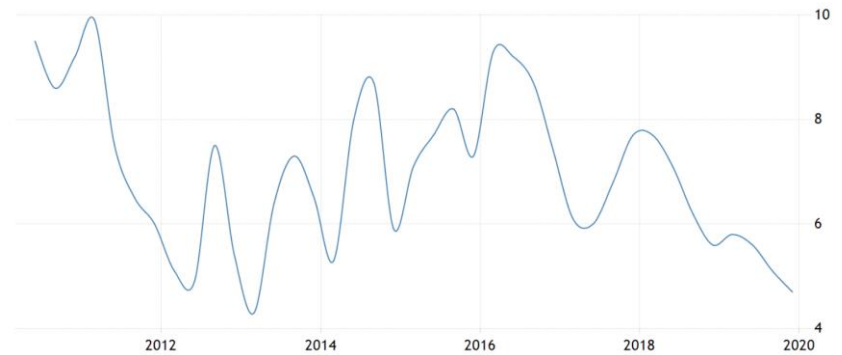
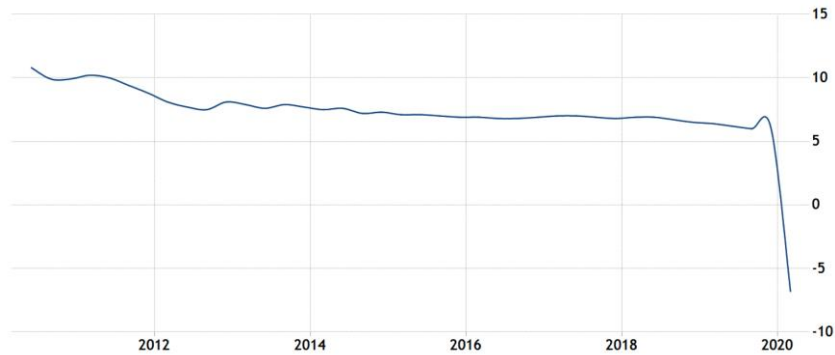


Indonesia - Purchasing Managers' Index (PMI)

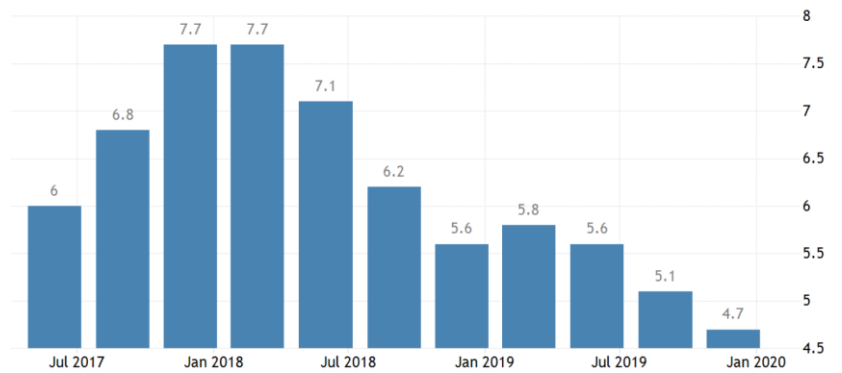


SOURCE : [TRADINGECONOMICS.COM](https://tradingeconomics.com) – STATISTICS INDONESIA

Ekonomi China dan India Akibat Pandemi C-19

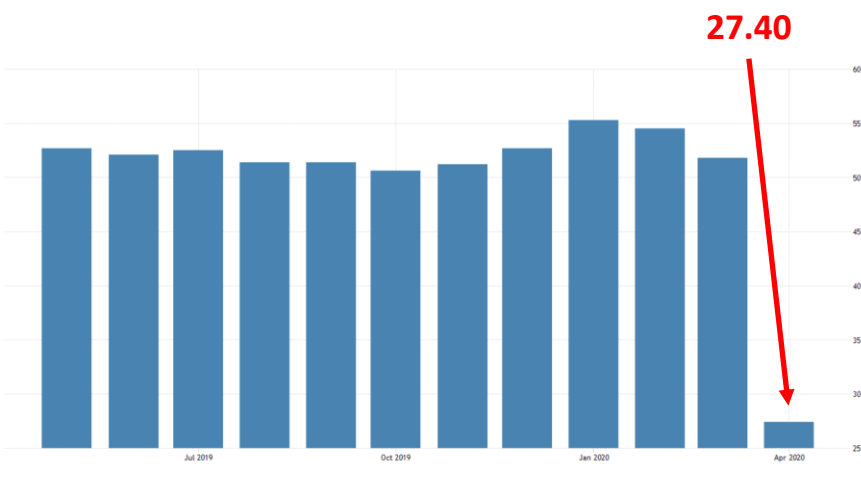
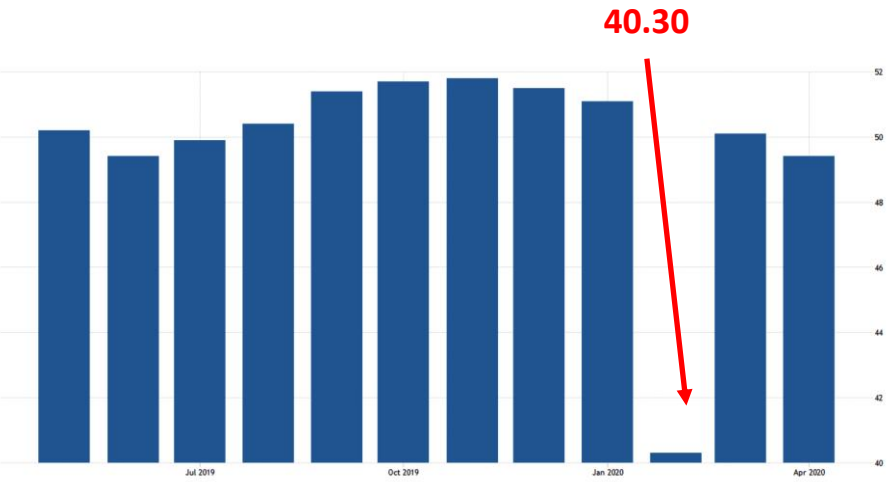
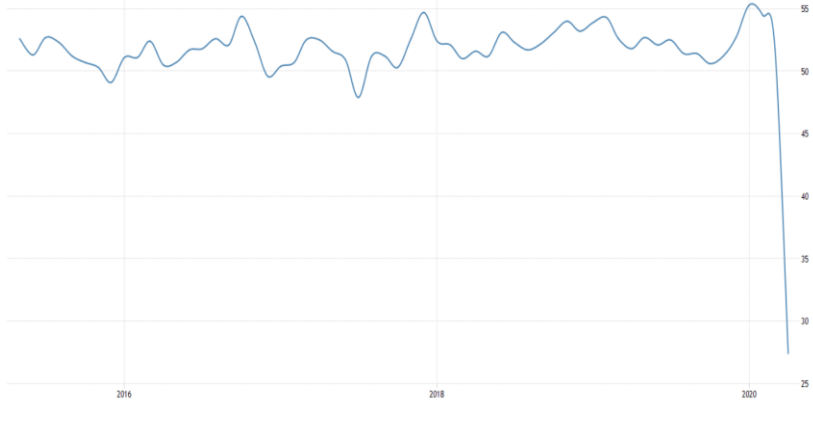
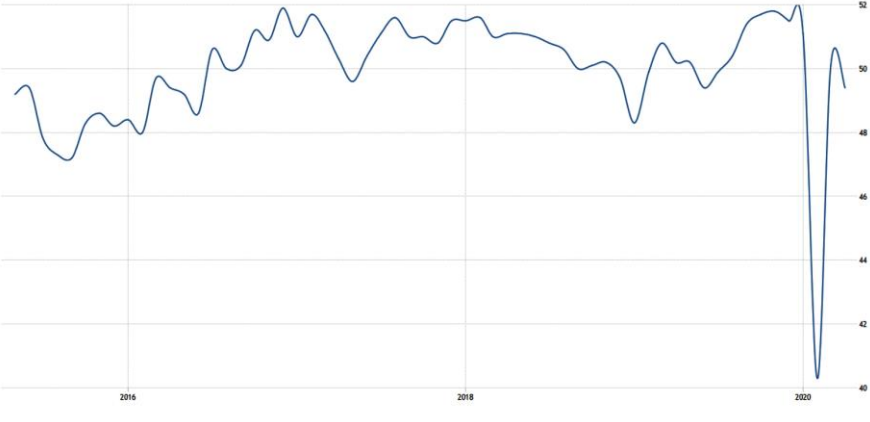


SOURCE: TRADINGECONOMICS.COM | NATIONAL BUREAU OF STATISTICS OF CHINA



SOURCE: TRADINGECONOMICS.COM | MINISTRY OF STATISTICS AND PROGRAMME IMPLEMENTATION (MOSPI)

China & India - Purchasing Managers' Index (PMI)



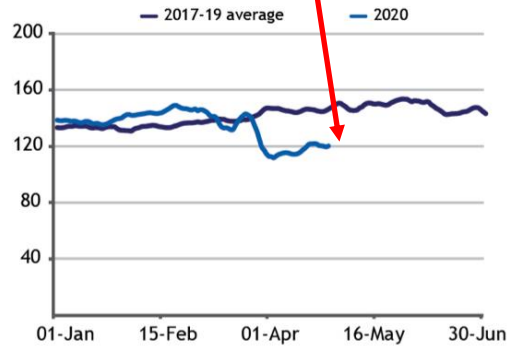
SOURCE : TRADINGECONOMICS.COM

Penurunan Kebutuhan Energi Pembangkit - GW

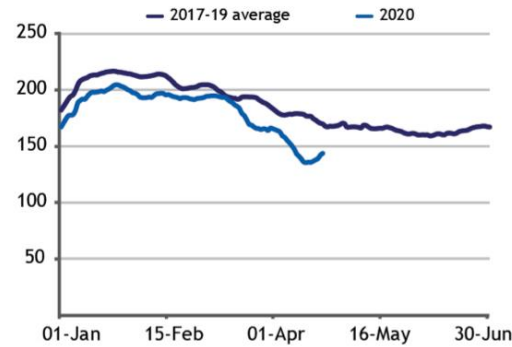


19% - 28 GW

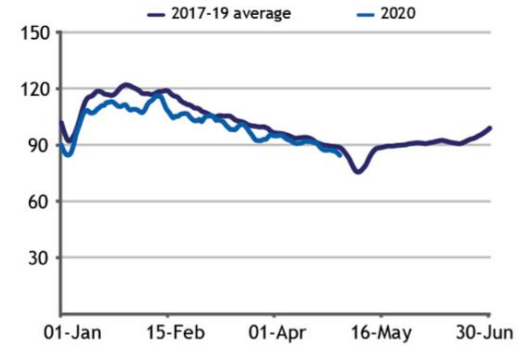
India



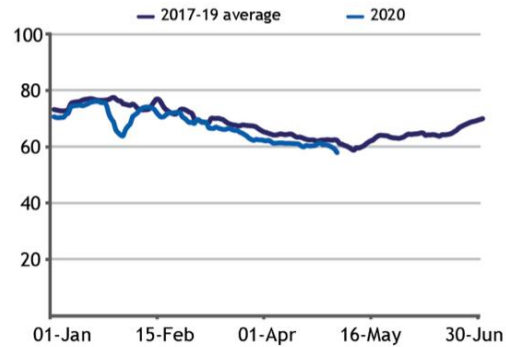
EU - Germany, Spain, France, UK



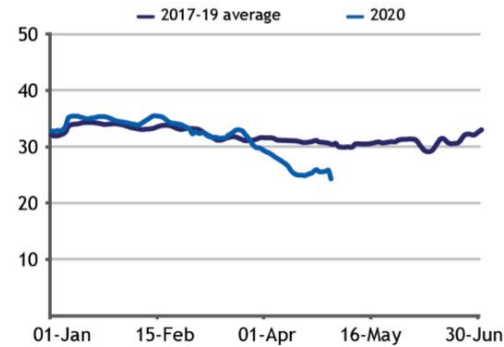
Japan



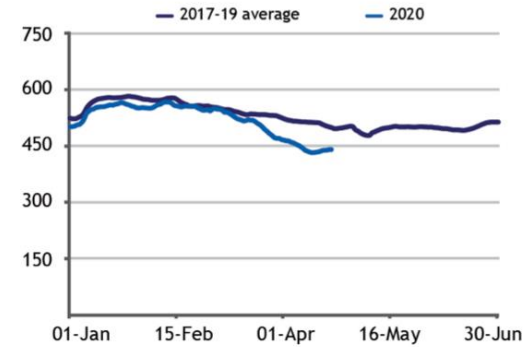
South Korea



Turkey



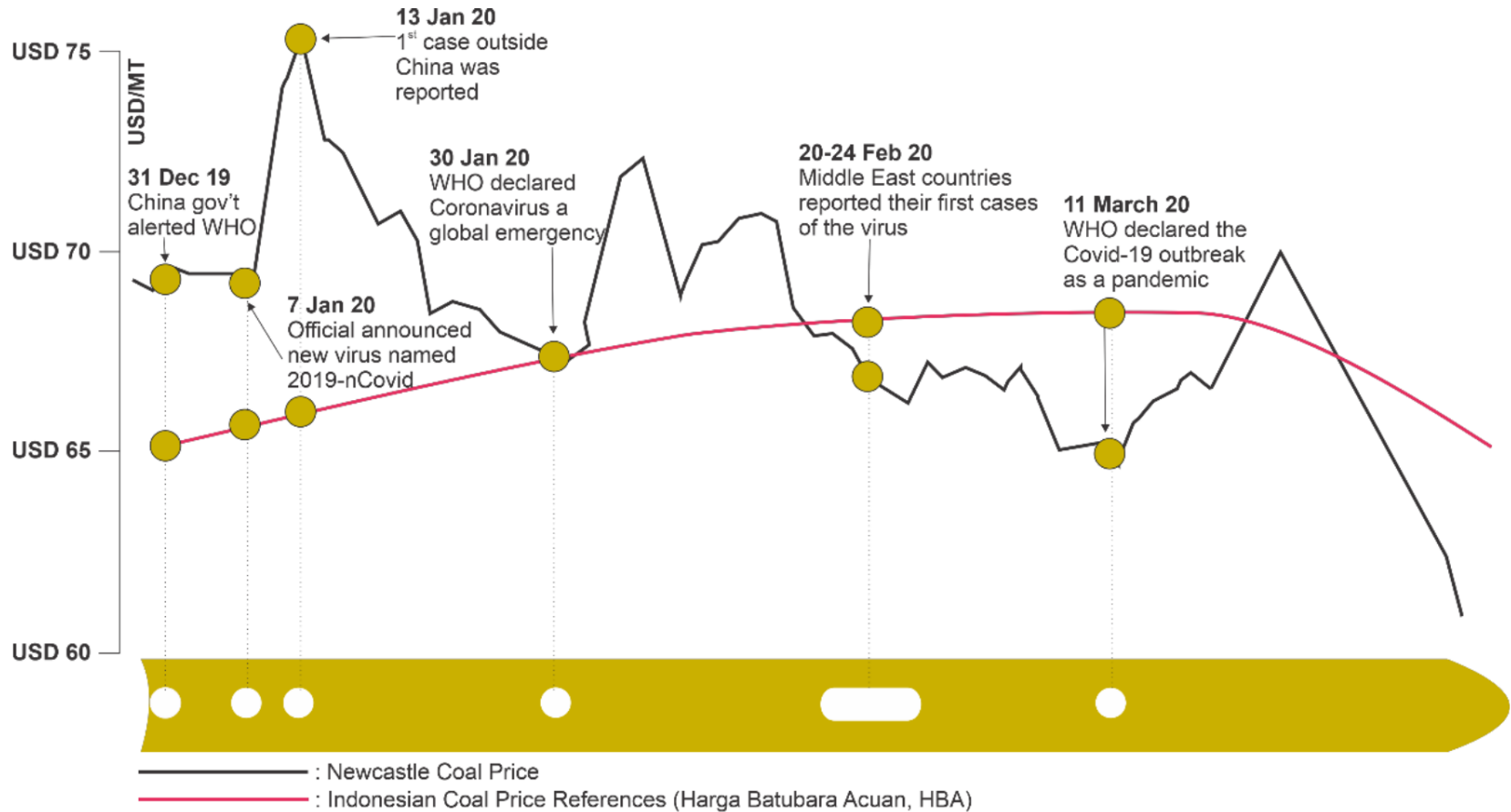
All



Fluktuasi Indeks Harga Batubara



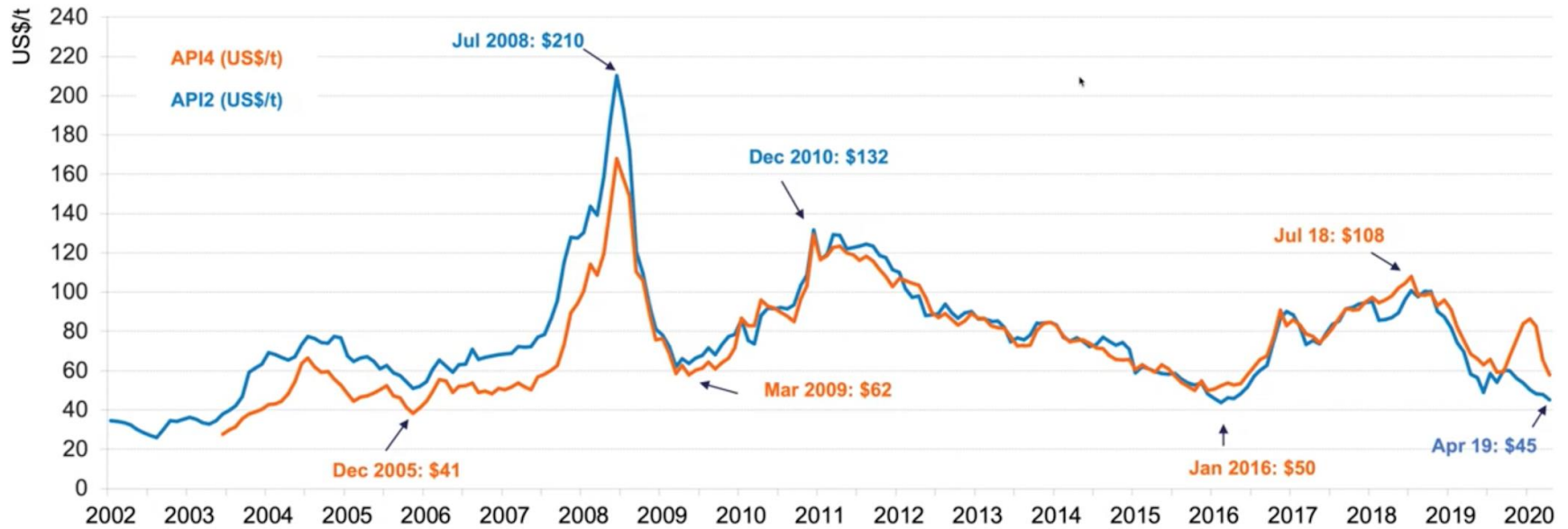
Coal Market



Fluktuasi Indeks Harga Batubara



INDEKS HARGA BATUBARA - 6.000 nar

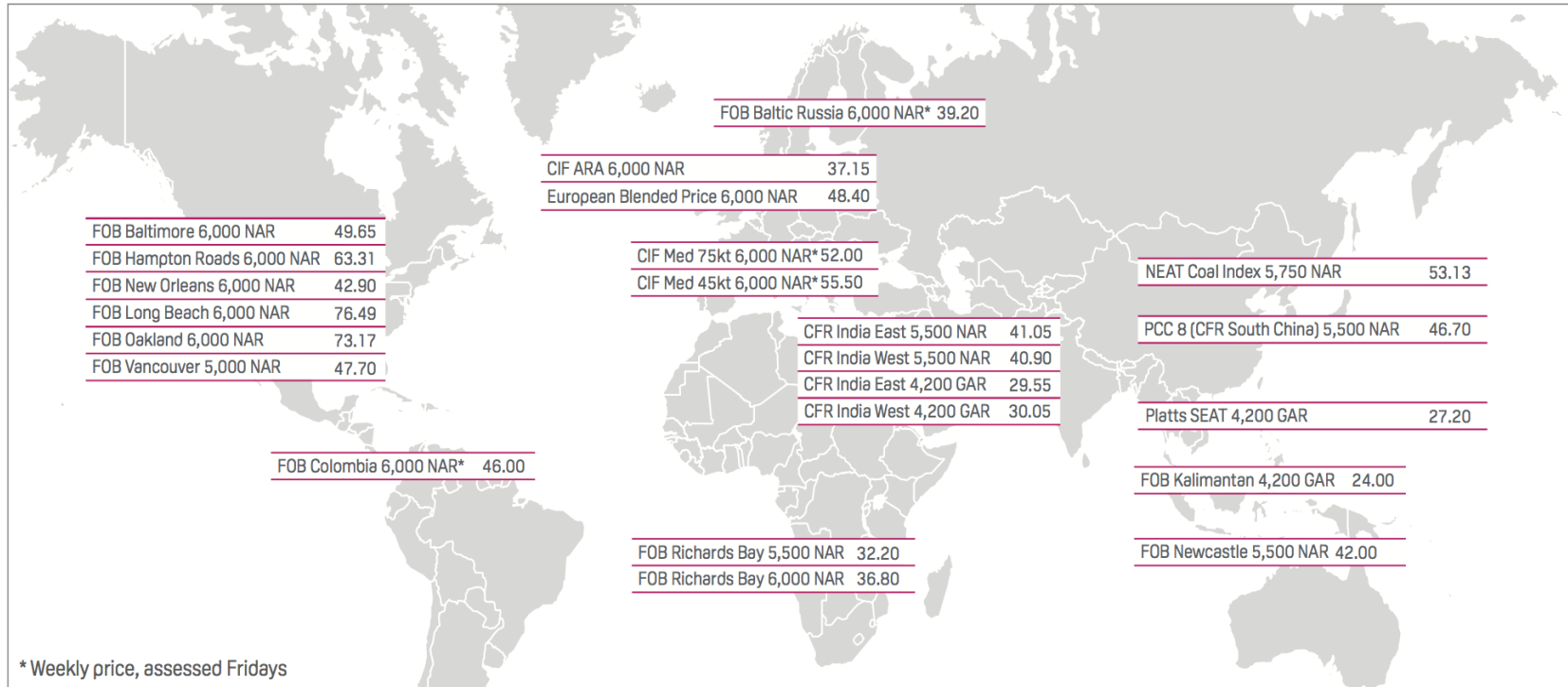


SOURCE : McCloskey Coal Price Index

Harga Batubara di Pasar Global



GLOBAL COAL PHYSICAL PRICE SNAPSHOT, APRIL 29 (\$/mt, kcal/kg)



Source: S&P Global Platts

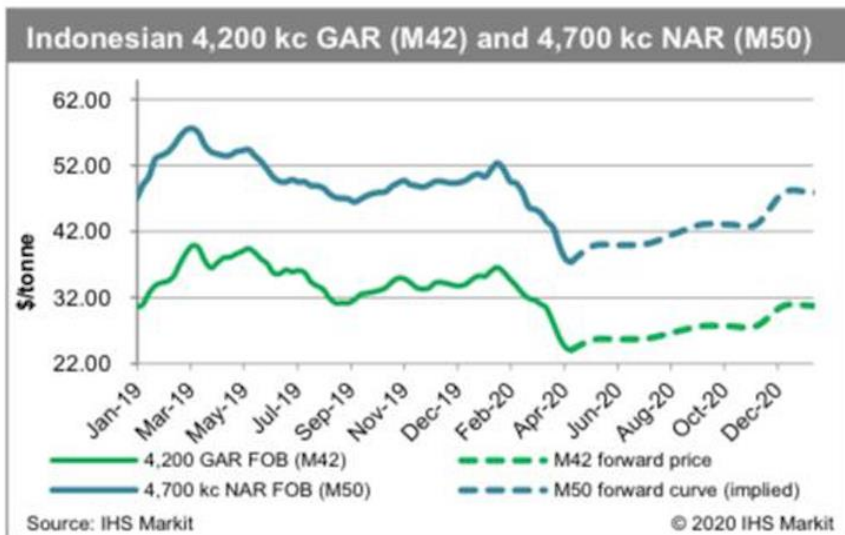
Harga Batubara di Pasar Global



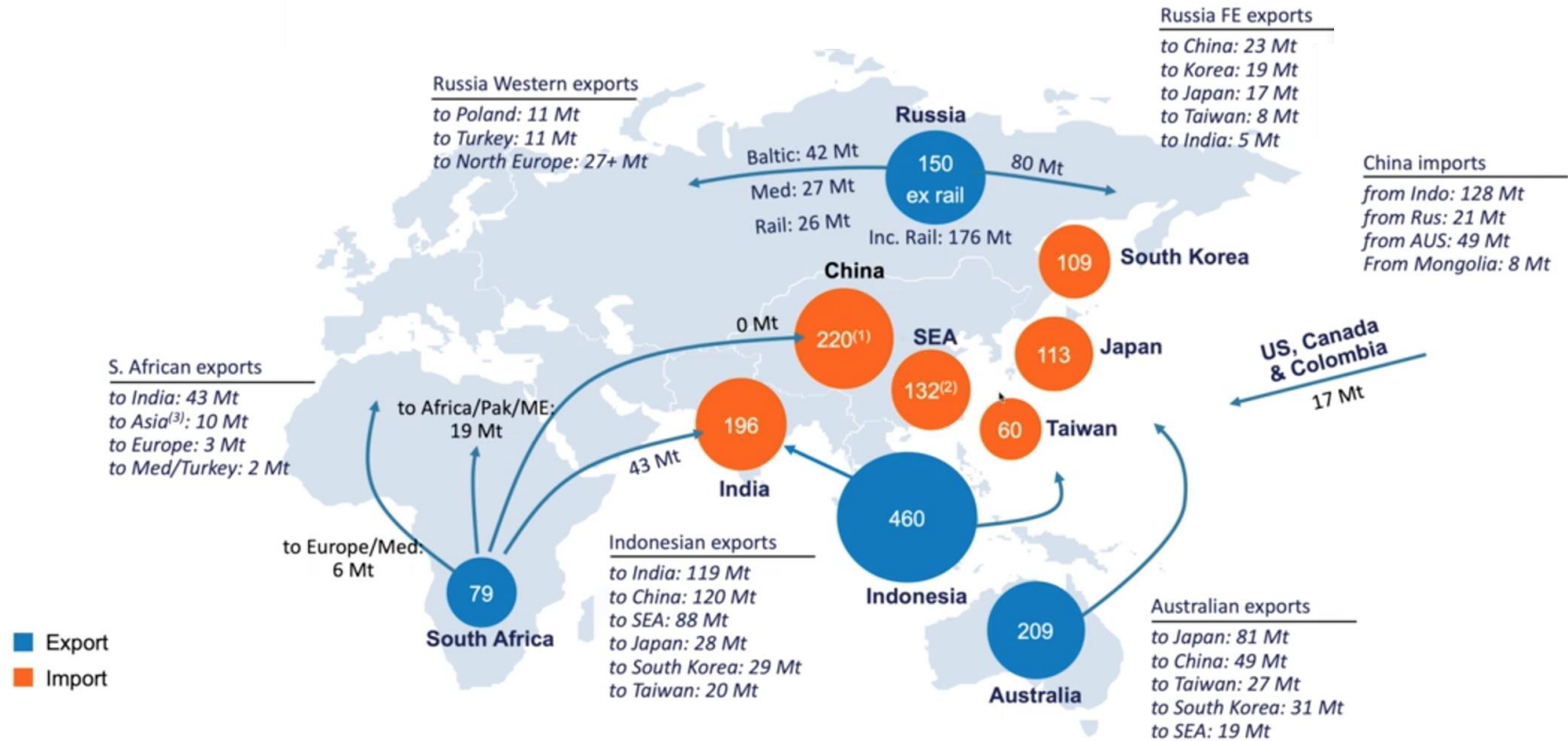
IHS McCloskey Indonesian FOB markers (\$/t)		Week ending 7 May 2020					
Grade (kcal)	Price basis	Week			Monthly average		
		07-May	01-May	Weekly change	MTD	Apr-20	Mar-20
M34	3,400kc GAR (3,000kc NAR)	17.17	17.29	(0.12)	17.23	19.58	21.54
M38	3,800kc GAR (3,400kc NAR)	20.65	21.46	(0.81)	21.06	25.12	27.43
M42	4,200kc GAR (3,800kc NAR)	24.03	24.36	(0.33)	24.20	28.78	32.46
M50	5,000kc GAR (4,700kc NAR)	37.41	37.74	(0.33)	37.58	42.57	47.06
M58	5,800kc GAR (5,500kc NAR)	47.67	47.64	0.03	47.66	54.20	58.58
M63	6,300kc GAR (6,000kc NAR)	56.35	57.08	(0.73)	56.72	62.84	67.29

*MTD: Month to Date, Source: IHS Markit

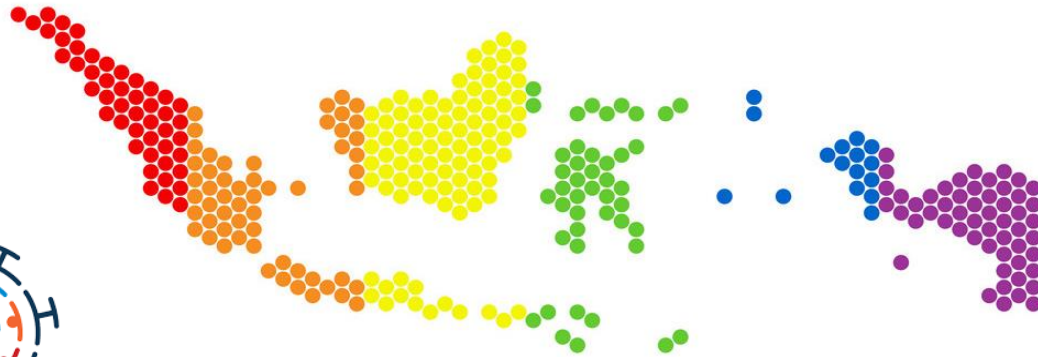
© 2020 IHS Markit



PASAR BATUBARA PASIFIC 2019



SOURCE: Schernikau Research

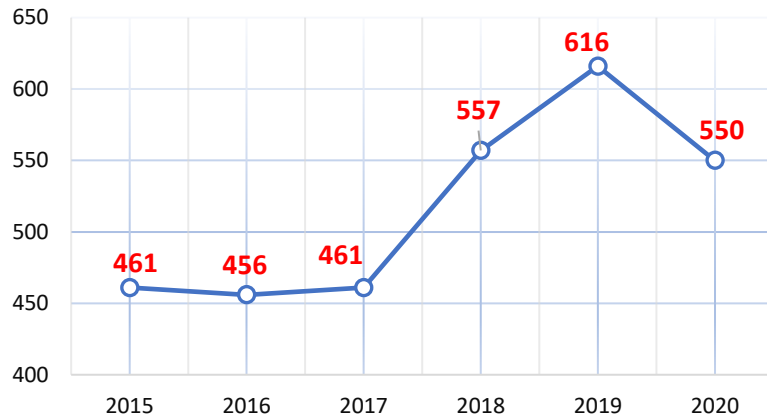


KEMANA INDONESIA KE DEPAN?



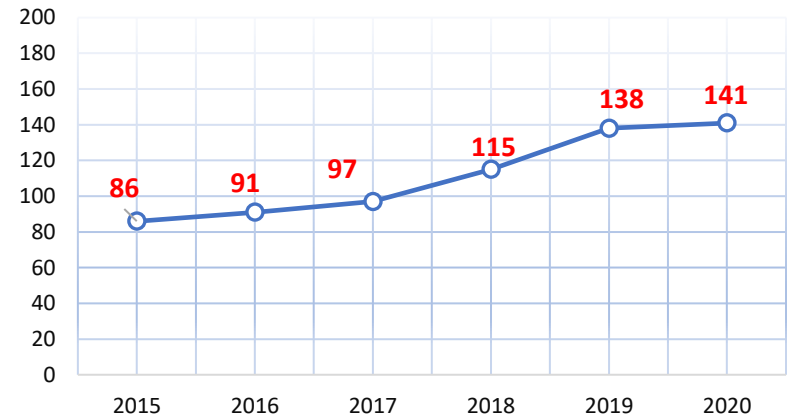
PRODUKSI BATUBARA

Dalam Juta MT



KEBUTUHAN DOMESTIK

Dalam Juta MT



- TOTAL PRODUKSI 2019 EMPAT KALI DIBANDINGKAN TOTAL KEBUTUHAN DI DALAM NEGERI
- PERTUMBUHAN PRODUKSI JAUH LEBIH CEPAT DARI KEBUTUHAN DI DALAM NEGERI
- HAMPIR 50 % PASAR EKSPOR BATUBARA INDONESIA, KE CINA DAN INDIA
- PRODUKSI SKALA IUP OP TUMBUH DAN MELAMBAT DI TENGAH PANDEMI C-19

TUJUAN EKSPOR BATUBARA INDONESIA / AUSTRALIA



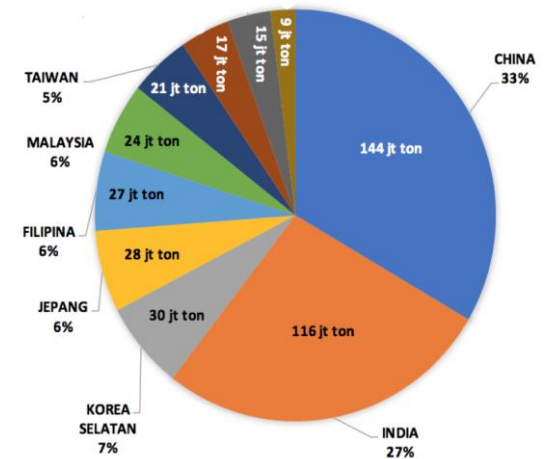
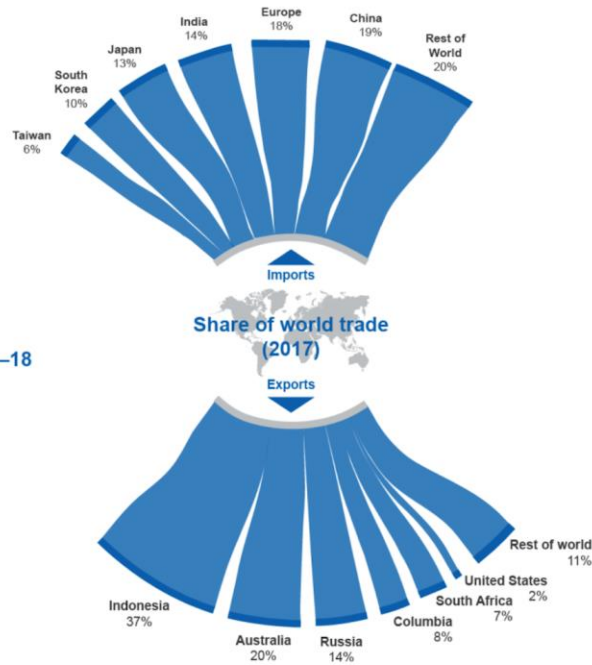
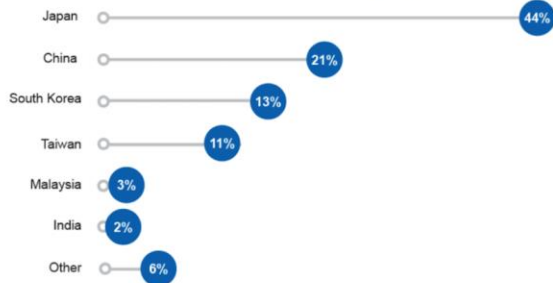
203 million tonnes exported in 2017–18, valued at \$22.6 billion

Australia is the second largest thermal coal exporter in the world.

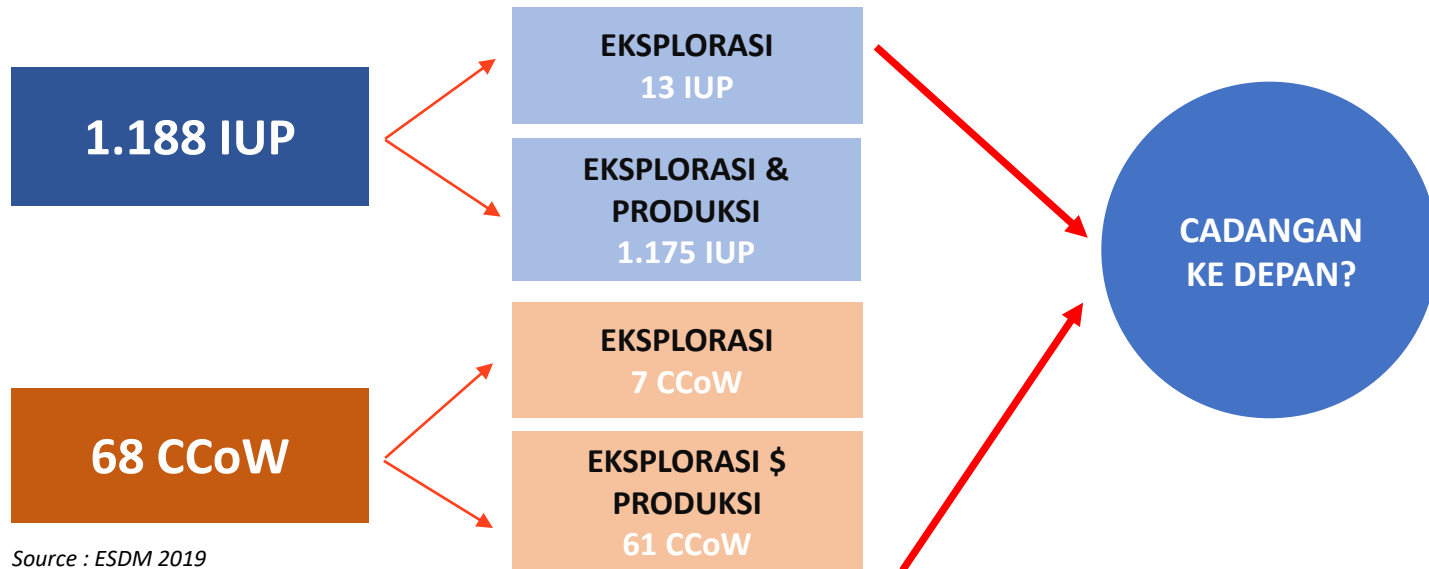
Around 80% of Australia's thermal coal is exported

1 tonne of coal powers the average Australian household for approximately 4 months.

Australia's thermal coal export earnings by destination, 2017–18



INDUSTRI PERTAMBANGAN BATUBARA INDONESIA

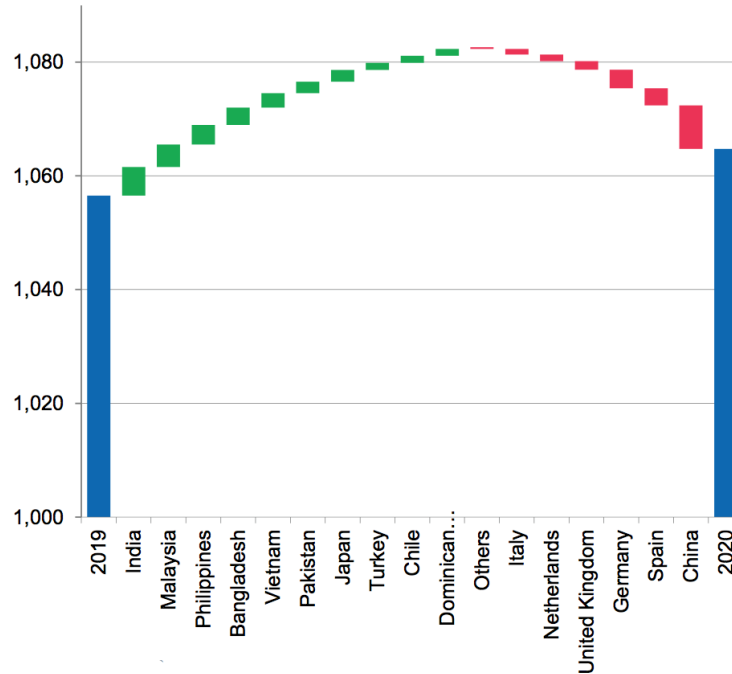


- IUP OP TUMBUH DENGAN CEPAT PASCA KEBIJAKAN OTONOMI DAERAH
- KONSOLIDASI IUP OP TIDAK MUDAH DILAKUKAN OLEH PEMERINTAH PUSAT
- JUMLAH IUP OP TIDAK SEIMBANG BESARANNYA DENGAN RENCANA PRODUKSI NASIONAL

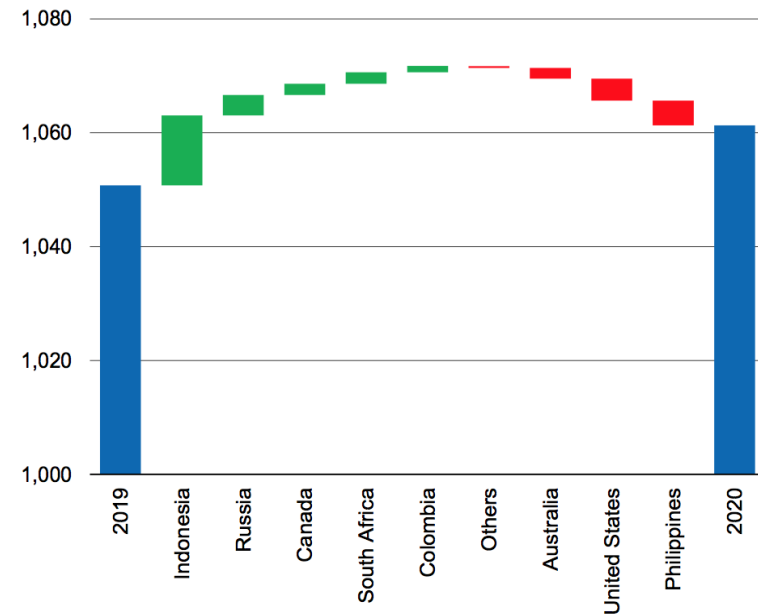
PROYEKSI POTENSI EKSPOR BATUBARA INDONESIA



PASAR IMPOR GLOBAL 2019 - 2020



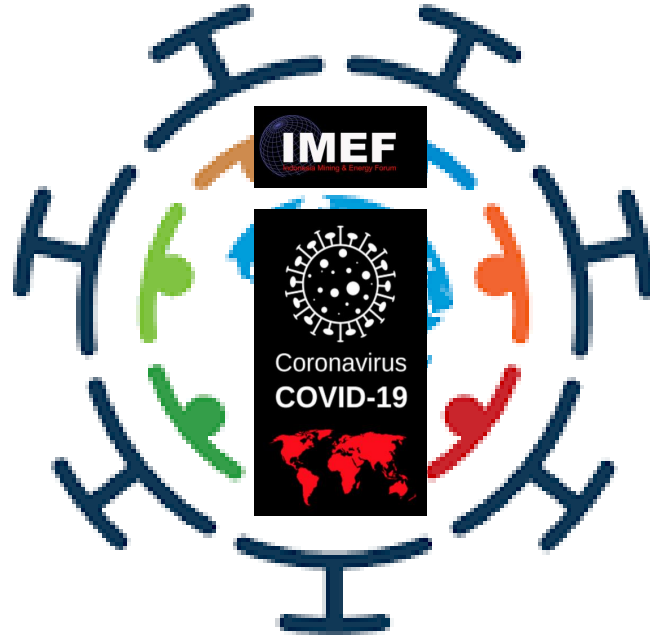
PASAR EKSPOR GLOBAL 2019 - 2020



- PASAR SEBATAS INDIA DAN CHINA, YANG RELATIF BESAR SEBAGAI POTENSI PASAR EKSPOR
- PASAR INDIA CENDERUNG TUMBUH DAN SEBALIKNYA PASAR CINA AKAN MENURUN
- MALAYSIA DAN VIETNAM DAPAT DIHARAPKAN MENJADI PASAR BARU, NAMUN TERBATAS KEBUTUHANNYA DIBANDING KECEPATAN PRODUKSI BATUBARA INDONESIA



- PEMANFAATAN SUMBER DAYA BATUBARA SEBAGAI ENERGI HARUS PARALEL DENGAN PRIORITAS PEMBANGUNAN ENERGI NASIONAL. MENGOPTIMALKAN NILAI TAMBAH BATUBARA MELALUI TEKNOLOGI MENJADI PILIHAN STRATEGIS.
- KONDISI PANDEMI C-19, DAPAT DISELESAIKAN MELALUI BERBAGAI STIMULUS, KHUSUSNYA KEBERANIAN PEMERINTAH MEMOTONG PENDAPATAN NASIONAL BUKAN PAJAK (PNBP) DAN MEKANISME PEMBAYARANNYA. NAMUN, PEMERINTAH TIDAK HARUS TERJEBAK MENGELOLA BATUBARA TANPA ADANYA BLUE-PRINT YANG JELAS ATAS PEMANFAATAN, PENGENDALIAN DAN INFRASTRUKTUR PENDUKUNG.



TERIMA KASIH