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AMMN Kejar Produksi Emas 579.000 Ons setelah Lonjakan Kuartal I/2026

Penulis : Hafiyyan

PT AMMAN Mineral Internasional Tbk. (AMMN) mencatat lonjakan produksi emas hingga 321% pada kuartal I/2026 seiring dengan peningkatan kadar bijih dan mulai optimalnya aktivitas penambangan di Fase 8 Batu Hijau. Hingga akhir tahun ini, perseroan menargetkan produksi emas mencapai 579.000 ons.

Berdasarkan laporan kinerja kuartal I/2026, produksi emas dalam konsentrat AMMN mencapai 136.115 ons, melonjak 321% secara tahunan dibandingkan realisasi kuartal I/2025 yang sebesar 32.340 ons.

Kenaikan produksi tersebut ditopang oleh peningkatan volume bijih segar yang ditambang dan membaiknya kadar emas. Sepanjang kuartal I/2026, kadar emas yang diolah naik menjadi 0,54 gram per ton dari sebelumnya 0,17 gram per ton pada periode yang sama tahun lalu.

Selain emas, produksi tembaga dalam konsentrat juga meningkat 173% secara tahunan menjadi 101 juta pon dari sebelumnya 37 juta pon. Sementara itu, produksi konsentrat mencapai 167.792 metrik ton kering atau naik 110% YoY.

Direktur Utama Amman Mineral Internasional Arief Sidarto mengatakan perseroan memulai 2026 dengan kinerja operasional yang solid di seluruh lini bisnis, mulai dari tambang hingga fasilitas pemurnian.

"Dari sisi pertambangan, produksi konsentrat mencapai 167.792 metrik ton kering, didukung oleh...

AMMN Targets 579,000 Ounces of Gold Production After First-Quarter 2026 Surge

Author: Hafiyyan

PT AMMAN Mineral Internasional Tbk. (AMMN) recorded a 321% surge in gold production in the first quarter of 2026, as ore grades increased and mining activities in Phase 8 of Batu Hijau began to optimize. The company is targeting gold production of 579,000 ounces by the end of this year.

Based on the first quarter 2026 performance report, AMMN's gold production in concentrate reached 136,115 ounces, a 321% year-on-year increase compared to the first quarter 2025 production of 32,340 ounces.

The increase in production was supported by an increase in the volume of fresh ore mined and an improvement in gold grade. Throughout the first quarter of 2026, the processed gold grade rose to 0.54 grams per tonne from 0.17 grams per tonne in the same period last year.

In addition to gold, copper production in concentrate also increased 173% year-on-year to 101 million pounds from 37 million pounds previously. Meanwhile, concentrate production reached 167,792 dry metric tons, a 110% year-on-year increase.

Amman Mineral Internasional President Director Arief Sidarto said the company began 2026 with solid operational performance across all business lines, from mining to refining facilities.

"From the mining side, concentrate production reached 167,792 dry metric tons, supported by...

didukung oleh peningkatan jumlah bijih segar yang ditambang serta perbaikan kadar bijih," ujarnya dalam keterangan resmi, dikutip Kamis (7/5/2026).

Arief menjelaskan, pada kuartal I/2026 aktivitas penambangan difokuskan untuk mengakses badan bijih berkadar rendah hingga menengah di Fase 8 Batu Hijau. Fase tersebut sebelumnya memasuki tahap pengupasan lapisan batuan penutup pada awal 2025 sehingga volume bijih segar yang ditambang masih terbatas.

Perseroan pun mempertahankan panduan produksi tahun 2026 dengan target produksi emas dalam konsentrat sebesar 579.000 ons dan produksi tembaga sebesar 485 juta pon atau setara 220.000 ton. Produksi konsentrat ditargetkan mencapai 900.000 metrik ton kering.

Dari sisi keuangan, AMMN membukukan penjualan bersih sebesar US\$808 juta pada kuartal I/2026, melonjak signifikan dibandingkan US\$2 juta pada periode yang sama tahun lalu. EBITDA tercatat mencapai US\$508 juta dengan margin EBITDA 63%, berbalik dari EBITDA negatif US\$42 juta pada kuartal I/2025.

Adapun laba bersih perseroan mencapai US\$163 juta pada kuartal I/2026, berbalik dari rugi bersih US\$138 juta pada kuartal I/2025. Kinerja tersebut didorong oleh kembali dibukanya ekspor konsentrat, kenaikan harga logam, dan peningkatan operasional smelter. Editor : Hafiyyan

supported by an increase in the amount of fresh ore mined and improvements in ore grade," he said in an official statement, quoted Thursday (May 7, 2026).

Arief explained that in the first quarter of 2026, mining activities will focus on accessing low- to medium-grade ore bodies in Batu Hijau Phase 8. This phase previously entered the overburden stripping phase in early 2025, resulting in limited fresh ore volumes.

The company also maintained its 2026 production guidance, targeting 579,000 ounces of gold in concentrate and 485 million pounds of copper, equivalent to 220,000 tons. Concentrate production is targeted to reach 900,000 dry metric tons.

Financially, AMMN posted net sales of US\$808 million in the first quarter of 2026, a significant increase from US\$2 million in the same period last year. EBITDA reached US\$508 million with an EBITDA margin of 63%, reversing from negative EBITDA of US\$42 million in the first quarter of 2025.

The company's net profit reached US\$ 163 million in the first quarter of 2026, reversing its net loss of US\$138 million in the first quarter of 2025. This performance was driven by the resumption of concentrate exports, rising metal prices, and increased smelter operations. Editor: Hafiyyan

Bisnis.com

Respons PTBA soal Wacana Skema Baru Bagi Hasil Tambang

Penulis : Lorenzo Anugrah Mahardhika

PT BUKIT Asam Tbk. (PTBA) meminta pemerintah mengkaji rencana penyusunan skema baru bagi hasil tambang ala minyak dan gas (migas) secara komprehensif sebelum menerapkannya.

Corporate Secretary Division Head PTBA Eko Prayitno menuturkan, wacana adopsi skema bagi hasil seperti cost recovery maupun gross split pada sektor migas perlu dikaji lebih dalam karena karakteristik industri pertambangan berbeda dengan migas.

Dia menjelaskan, sektor migas memiliki risiko eksplorasi yang sangat tinggi dengan kebutuhan investasi awal yang besar. Sementara itu, pertambangan batu bara memiliki risiko penemuan cadangan yang relatif lebih terukur, tetapi menghadapi tantangan besar pada aspek logistik, pengelolaan lingkungan, dan volatilitas harga komoditas.

PTBA berpandangan, skema apa pun yang nantinya diterapkan pemerintah tetap harus menjaga margin usaha yang sehat agar perusahaan tambang dapat melanjutkan pengembangan proyek strategis dan hilirisasi.

"Skema apa pun yang dipilih harus tetap mempertimbangkan margin yang sehat agar perusahaan dapat terus mengembangkan proyek-proyek strategis dan hilirisasi untuk memperkuat ketahanan energi nasional," kata Eko saat dihubungi Bisnis, dikutip Kamis (7/5/2026).

PTBA's Response to the Discourse on a New Mining Profit-Sharing Scheme

Author: Lorenzo Anugrah Mahardhika

PT BUKIT Asam Tbk. (PTBA) has asked the government to comprehensively review plans to develop a new profit-sharing scheme similar to oil and gas mining before implementing it.

PTBA Corporate Secretary Division Head Eko Prayitno said that the discourse on adopting profit-sharing schemes such as cost recovery and gross split in the oil and gas sector needs to be studied more deeply because the characteristics of the mining industry are different from those of the oil and gas sector.

He explained that the oil and gas sector carries very high exploration risks and requires significant initial investment. Meanwhile, coal mining carries a relatively more measurable risk of discovering reserves but faces significant challenges in logistics, environmental management, and commodity price volatility.

PTBA believes that whatever scheme the government implements, it must maintain healthy operating margins so that mining companies can continue developing strategic projects and downstreaming.

"Whatever scheme is chosen, it must still consider healthy margins so that the company can continue developing strategic projects and downstreaming to strengthen national energy security," Eko said when contacted by Bisnis, quoted on Thursday (May 7, 2026).

Adapun, PTBA menilai kebijakan baru tersebut perlu diikuti regulasi turunan yang komprehensif agar tidak menimbulkan ketidakpastian bagi pelaku usaha, khususnya perusahaan terbuka yang bergantung pada kepercayaan investor dan keberlanjutan operasional jangka panjang.

Eko mengatakan, perseroan pada prinsipnya mendukung kebijakan pemerintah yang bertujuan mengoptimalkan pemanfaatan sumber daya alam bagi negara.

"Namun, kepastian hukum merupakan variabel krusial bagi perusahaan terbuka seperti PTBA untuk menjaga kepercayaan pemegang saham dan keberlanjutan operasional jangka panjang," ujarnya.

Lebih lanjut, PTBA menilai daya saing investasi sektor pertambangan nasional sangat ditentukan oleh keseimbangan antara besaran penerimaan negara dan tingkat pengembalian investasi bagi pelaku usaha.

Perseroan mengingatkan agar total beban fiskal sektor tambang, mulai dari royalti, pajak penghasilan hingga skema bagi hasil baru, tetap berada dalam batas yang kompetitif dibandingkan negara pesaing lainnya.

PTBA juga mendorong agar pemerintah menyiapkan insentif bagi perusahaan yang menjalankan program hilirisasi, termasuk pembangunan PLTU mulut tambang dan proyek gasifikasi batu bara.

"Kami meyakini pemerintah akan merumuskan formula yang seimbang sehingga optimalisasi penerimaan negara dapat tercapai dan minat investor semakin tinggi untuk melakukan pengembangan di sektor pertambangan Indonesia," ujar Eko. Editor : Denis Riantiza Meilanova

Meanwhile, PTBA believes that the new policy needs to be accompanied by comprehensive derivative regulations to avoid creating uncertainty for business actors, especially public companies that depend on investor trust and long-term operational sustainability.

Eko said that the company in principle supports government policies aimed at optimizing the use of natural resources for the country.

"However, legal certainty is a crucial variable for a public company like PTBA to maintain shareholder trust and ensure long-term operational sustainability," he said.

Furthermore, PTBA assesses that the competitiveness of investment in the national mining sector is largely determined by the balance between the amount of state revenue and the level of return on investment for business actors.

The company reminded that the total fiscal burden of the mining sector, from royalties, income tax to the new profit-sharing scheme, must remain within competitive limits compared to other competing countries.

PTBA also encouraged the government to provide incentives for companies implementing downstreaming programs, including the construction of mine-mouth coal-fired power plants and coal gasification projects.

"We believe the government will formulate a balanced formula to optimize state revenues and increase investor interest in developing Indonesia's mining sector," said Eko. Editor: Denis Riantiza Meilanova

Bisnis.com

Vale Bakal Gelar RUPS, Simak Historis Dividen INCO Selama 6 Tahun

Penulis : I Putu Gede Rama
Paramahamsa

PT VALE Indonesia Tbk. (INCO) bakal menggelar Rapat Umum Pemegang Saham Tahunan (RUPST) dengan enam mata acara. Salah satunya adalah persetujuan atas penggunaan laba bersih tahun buku 2025 perseroan.

Melansir keterbukaan informasi, INCO bakal menggelar RUPST pada Selasa (2/6/2026) di Jakarta. Nantinya, para pemegang saham yang namanya telah tercatat pada Daftar Pemegang Saham perseroan selambatnya hingga 4 Mei 2026, menjadi peserta rapatnya.

Agenda pertama dalam RUPST INCO adalah persetujuan atas laporan tahunan yang termasuk laporan tugas pengawasan Dewan Komisaris dan pengesahan laporan keuangan INCO untuk tahun buku 2025. Selain itu, INCO juga bakal meminta persetujuan pemegang saham untuk memberikan pembebasan tanggung jawab sepenuhnya kepada anggota direksi dan komisaris atas kepengurusan selama 2025.

Agenda kedua merupakan persetujuan atas penggunaan laba bersih yang telah mampu dibukukan perseroan sepanjang 2025.

Adapun INCO membukukan laba bersih sebesar US\$76,1 juta atau setara Rp1,27 triliun (kurs jisdor Rp16.720 per dolar AS) sepanjang 2025, meningkat 32% dibandingkan tahun sebelumnya, seiring kinerja operasional yang tetap solid dan efisiensi biaya yang terjaga di tengah tekanan harga nikel global.

Vale to Hold GMS, Review INCO's Dividend History Over the Past 6 Years

Author: I Putu Gede Rama
Paramahamsa

PT VALE Indonesia Tbk. (INCO) will hold an Annual General Meeting of Shareholders (AGM) with six agenda items. One of these is approval of the use of the company's 2025 net profit.

According to a disclosure of information, INCO will hold an AGM on Tuesday (June 2, 2026) in Jakarta. Shareholders whose names are registered on the company's Shareholder Register by May 4, 2026, will be eligible to attend the meeting.

The first agenda item in INCO's AGMS is the approval of the annual report, including the Board of Commissioners' supervisory report, and the ratification of INCO's financial report for the 2025 financial year. In addition, INCO will also seek shareholder approval to grant full release and discharge to members of the board of directors and commissioners for their management duties during 2025.

The second agenda item is approval of the use of the net profit the company has recorded throughout 2025.

Meanwhile, INCO recorded a net profit of US\$76.1 million, equivalent to Rp1.27 trillion (JISDOR exchange rate of Rp16,720 per US dollar) throughout 2025, an increase of 32% compared to the previous year, in line with operational performance that remained solid and maintained cost efficiency amid pressure on global nickel prices.

Berdasarkan catatan Bisnis.com, pada tahun buku 2024, INCO membagikan dividen senilai US\$34,65 juta atau setara Rp573,04 miliar (kurs Jisdor Rp16.535 per dolar AS) kepada pemegang sahamnya. Saat itu, INCO hanya mampu membukukan laba bersih senilai Rp931,33 miliar atau setara dengan US\$57,76 juta.

Sementara pada tahun buku 2023, absen membagikan dividen. Manajemen saat itu menerangkan bahwa para pemegang saham sepakat untuk tidak membagikan dividen lantaran INCO tengah mengejar tenggat penyelesaian tiga proyek bernilai jumbo di Sulawesi.

Pada tahun buku 2022, dividen yang dibagikan INCO sebesar US\$60,12 juta atau sekitar Rp890,38 miliar, sehingga dividen per saham adalah sebesar Rp89,6. Pembayaran dividen ini setara dengan 30% dari laba bersih yang dapat diatribusikan kepada pemilik entitas induk, yaitu sebesar US\$200,4 juta.

Sementara itu, pada tahun buku 2021, INCO memutuskan untuk tidak membagikan keuntungan kepada pemegang saham. Keputusan ini disetujui dalam RUPST 2021 dengan mempertimbangkan kebutuhan belanja modal untuk tiga proyek yang sedang berlangsung di Bahodopi, Pomalaa, dan Sorowako, serta kebutuhan modal kerja INCO di masa depan.

Lebih lanjut, pada tahun buku 2020, INCO menyetujui pembagian dividen sebesar US\$33 juta, yang setara dengan 40% dari laba bersih tahun 2020 sebesar US\$82,82 juta. Pembayaran dividen pada tahun 2020 merupakan yang pertama dalam enam tahun terakhir, setelah terakhir kali dividen dibagikan untuk kinerja tahun buku 2014.

Pada RUPST tahun buku 2019, pemegang saham juga memutuskan tidak membagikan dividen. Hal itu lantaran mempertimbangkan kondisi kas perusahaan.

According to Bisnis.com, in the 2024 financial year, INCO distributed dividends worth US\$34.65 million, equivalent to Rp573.04 billion (Jisdor exchange rate of Rp16,535 per US dollar) to its shareholders. At that time, INCO only posted a net profit of Rp931.33 billion, equivalent to US\$57.76 million.

Meanwhile, in the 2023 financial year, there was no dividend distribution. Management at the time explained that shareholders agreed not to distribute dividends because INCO was meeting the deadline for completing three large-scale projects in Sulawesi.

In the 2022 financial year, INCO distributed US\$60.12 million in dividends, or approximately Rp890.38 billion, resulting in a dividend per share of Rp89.6. This dividend payment is equivalent to 30% of net profit attributable to owners of the parent entity, which is US\$200.4 million.

Meanwhile, in the 2021 financial year, INCO decided not to distribute profits to shareholders. This decision was approved at the 2021 AGM, taking into account capital expenditure requirements for three ongoing projects in Bahodopi, Pomalaa, and Sorowako, as well as INCO's future working capital needs.

Furthermore, in the 2020 fiscal year, INCO approved a dividend distribution of US\$33 million, equivalent to 40% of its 2020 net profit of US\$82.82 million. This dividend payment in 2020 was the first in six years, after the last dividend was distributed for the 2014 fiscal year.

At the 2019 AGM, shareholders also decided not to distribute dividends, citing the company's cash flow.

Agenda ketiga dalam RUPST INCO adalah persetujuan atas remunerasi bagi anggota dewan komisaris, beserta gaji, tunjangan, dan bonus bagi anggota direksi untuk tahun buku 2026; agenda keempat merupakan penunjukkan akuntan publik untuk laporan keuangan tahun buku 2026; dan agenda kelima merupakan laporan realisasi penggunaan dana hasil PUT dalam rights issue pada 2024.

Terakhir, INCO bakal meminta persetujuan atas perubahan susunan pengurus perseroan. Meskipun begitu, belum terang siapa saja yang akan digantikan dalam RUPST kali ini.

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The third agenda item at INCO's AGM was approval of the remuneration for the board of commissioners, along with salaries, allowances, and bonuses for the board of directors for the 2026 financial year; the fourth agenda item was the appointment of a public accountant for the 2026 financial year; and the fifth agenda item was a report on the realization of the use of proceeds from the PUT in a rights issue in 2024.

Finally, INCO will seek approval for changes to the company's management structure. However, it is not yet clear who will be replaced at this AGM.

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Cek Kisi-kisi Dividen Timah (TINS) yang Bakal Gelar RUPST

Penulis : I Putu Gede Rama
Paramahamsa

EMITEN Grup MIND ID, PT Timah (Persero) Tbk. (TINS) bakal menggelar Rapat Umum Pemegang Saham Tahunan (RUPST) untuk tahun buku 2025.

Melansir keterbukaan informasi Bursa Efek Indonesia (BEI), TINS pada Rabu (6/5/2025) mengumumkan rencana RUPST untuk tahun buku 2025. Dalam suratnya kepada BEI, pemanggilan rapat di situs KSEI dan BEI bakal dilakukan pada Kamis (21/5/2026).

Check the TIMAH (TINS) Dividend Guidelines Which Will Hold an AGMS

Author: I Putu Gede Rama
Paramahamsa

MIND ID Group issuer, PT Timah (Persero) Tbk. (TINS) will hold an Annual General Meeting of Shareholders (AGM) for the 2025 financial year.

Citing the information disclosure of the Indonesia Stock Exchange (IDX), TINS on Wednesday (6/5/2025) announced the plan for the AGMS for the 2025 financial year. In its letter to the IDX, the meeting invitation on the KSEI and IDX websites will be made on Thursday (21/5/2026).

Secara historis, keputusan TINS untuk membagikan dividen biasanya diambil dalam RUPST perseroan. Pada tahun buku 2024 misalnya, emiten tambang pelat merah ini memanfaatkan sebagian laba tahun buku 2024 sebesar Rp1,18 triliun sebagai dividen.

Total nilai dividen TINS itu mencapai Rp474,65 miliar atau sekitar Rp63,73 per saham. Kemudian, rasio tebaran dividen atau dividend payout ratio TINS mencapai 40%. Sisanya atau 60% dari laba yang mencapai Rp711,98 miliar dimanfaatkan sebagai saldo laba yang belum dicadangkan.

Sementara pada 2023, TINS memutuskan untuk tidak membagikan dividen. Direktur Keuangan dan Manajemen Risiko Timah Fina Eliani, saat itu mengatakan keputusan untuk tidak membagikan dividen dilakukan pemegang saham lantaran masih mengalami kerugian.

“Kami membukukan kerugian yang cukup besar Rp449 miliar. Oleh karena itu, memutuskan tidak membagikan dividen,” kata Fina dalam Rapat Umum Pemegang Saham Tahunan (RUPST) PT Timah Tbk Tahun Buku 2023, Rabu (8/5/2024).

Sementara melansir laman TINS, selama periode tahun buku 2021—2025, hanya pada 2023 TINS tidak membagikan dividen. Pada tahun buku 2022, dividen dibayarkan senilai Rp41,95 per saham atau mencerminkan dividend payout ratio sebesar 30%.

Sementara itu, pada tahun buku 2021, perseroan membagikan dividen senilai Rp61,22 per saham atau dengan dividend payout ratio sebesar 35%. Dividen ini dibayarkan pada 24 Juni 2022. Total besaran dividen TINS pada tahun buku tersebut senilai Rp455,97 miliar.

Menengok kinerja 2025 TINS, membukukan laba bersih senilai Rp1,31 triliun sepanjang 2025. Raihan ini mencapai 119% dari target yang ditetapkan Perseroan.

Historically, TINS's decision to distribute dividends has typically been made at the company's AGM. For example, in the 2024 fiscal year, the state-owned mining company allocated a portion of its 2024 fiscal year profit, amounting to Rp1.18 trillion, as dividends.

TINS's total dividends reached Rp474.65 billion, or approximately Rp63.73 per share. Furthermore, TINS's dividend payout ratio reached 40%. The remaining 60% of the Rp711.98 billion profit was allocated as unappropriated retained earnings.

Meanwhile, in 2023, TINS decided not to distribute dividends. Fina Eliani, Director of Finance and Risk Management at Timah, stated at the time that the decision not to distribute dividends was made by shareholders due to ongoing losses.

“We recorded a significant loss of IDR 449 billion. Therefore, we have decided not to distribute dividends,” Fina said at the Annual General Meeting of Shareholders (AGM) of PT Timah Tbk for the 2023 fiscal year, Wednesday (May 8, 2024).

Meanwhile, according to the TINS website, during the 2021-2025 fiscal year, TINS did not distribute dividends only in 2023. In the 2022 fiscal year, dividends were paid at IDR 41.95 per share, reflecting a dividend payout ratio of 30%.

Meanwhile, in the 2021 financial year, the company distributed dividends worth Rp61.22 per share, or a dividend payout ratio of 35%. This dividend was paid on June 24, 2022. TINS's total dividends for the financial year amounted to Rp455.97 billion.

Looking at TINS's 2025 performance, it recorded a net profit of IDR 1.31 trillion throughout 2025. This achievement reached 119% of the Company's target.

Sepanjang tahun lalu, pendapatan TINS naik 6,41% menjadi Rp11,55 triliun dari yang sebelumnya Rp10,86 triliun pada 2024. Peningkatan ini didorong oleh kenaikan harga jual rata-rata logam timah.

Dengan begitu, peluang pembagian dividen besar terjadi pada tahun ini. Menengok historis, dividend payout ratio TINS berkisar pada 30-40%. Dengan begitu, TINS berpeluang membagikan dividen senilai Rp393 miliar-Rp524 miliar.

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Throughout last year, TINS' revenue rose 6.41% to Rp11.55 trillion from Rp10.86 trillion in 2024. This increase was driven by an increase in the average selling price of tin metal.

Therefore, there's a significant opportunity for dividend distribution this year. Historically, TINS's dividend payout ratio has been around 30-40%. Therefore, TINS has the potential to distribute dividends worth between Rp393 billion and Rp524 billion.

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ITB Met Connex 2026: Hilirisasi Sudah Jadi Mandatori, Industri Mesti Jalankan Cepat

Oleh: Azis Husaini | Editor: Azis Husaini

INDUSTRI pertambangan saat ini tengah menghadapi berbagai tantangan. Mereka harus melakukan transformasi mengikuti arah kebijakan nasional. Melalui Undang-Undang No. 3 Tahun 2020 serta regulasi terbaru di tahun 2023, pemerintah berupaya menciptakan ekosistem yang lebih teratur, meskipun bagi para pelaku usaha, sistem ekonomi pertambangan saat ini dirasakan kian kompleks.

Saat ini banyak isu yang saling terhubung di industri pertambangan, mulai dari penguasaan cadangan, hilirisasi, tantangan teknis penambangan, dampak lingkungan, tanggung jawab sosial (CSR), teknologi pengolahan, hingga pengelolaan limbah.

ITB Met Connex 2026: Downstreaming Has Become Mandatory, Industry Must Accelerate

By: Azis Husaini | Editor: Azis Husaini

THE MINING industry currently faces various challenges. They must transform themselves in line with national policy directions. Through Law No. 3 of 2020 and the latest regulations in 2023, the government is striving to create a more orderly ecosystem, although for business players, the current mining economic system feels increasingly complex.

Currently, there are many interconnected issues in the mining industry, ranging from reserve control, downstreaming, technical mining challenges, environmental impacts, social responsibility (CSR), processing technology, to waste management.

Menurut Mantan Direktur Utama Antam dan Chairman ITB Mining Engineering Alumni Association Achmad Ardianto arah kebijakan pemerintah saat ini telah menempatkan hilirisasi sebagai pernyataan mandatori. Peran industri bukan hanya memastikan program ini berjalan, melainkan mengakselerasinya agar berjalan lebih cepat dan tepat.

"Hilirisasi adalah kunci untuk melepaskan diri dari ketergantungan ekspor bahan mentah dan meningkatkan nilai tambah ekonomi nasional," ungkap Ardianto yang pernah menjadi Direktur Utama Timah dan Direktur Utama Antam dalam konferensi pers METCONNEX 2026 dengan tema "Strengthening Indonesia's Metallurgy Industry: Towards Sustainable Growth and Global Competitiveness", Kamis (7/5).

Ardianto mengatakan, perubahan besar selalu membawa tantangan yang beragam. Untuk menjawab tantangan tersebut, diperlukan kerja sama lintas sektor yang dikenal dengan konsep Pentahelix, Pemerintah sebagai pembuat aturan dan regulator.

Lalu pengusaha sebagai pelaku utama penggerak ekonomi, akademisi memberikan fondasi pendidikan dan riset, komunitas profesi memberikan dukungan sosial dan keahlian spesifik, dan media sebagai elemen kelima yang krusial dalam menyebarkan informasi dan edukasi.

Ia mengatakan, tanpa adanya proses edukasi yang masif kepada masyarakat melalui peran media dan komunitas, upaya untuk mencapai kemandirian industri akan sangat sulit diwujudkan. Kerja sama yang solid akan memberikan peluang bagi pemerintah untuk mengejar target-target strategisnya.

Peran Strategis METCONNEX dalam konteks ini, kata Ardianto hadir sebagai platform strategis untuk mendukung proses edukasi secara *end-to-end*. Fokus utamanya adalah pada peningkatan teknologi proses yang mendukung pengurangan limbah dan optimalisasi data.

According to Achmad Ardianto, former President Director of Antam and Chairman of the ITB Mining Engineering Alumni Association, the current government policy direction has made downstreaming a mandatory statement. The industry's role is not only to ensure the program's implementation, but also to accelerate it to ensure faster and more accurate implementation.

"Downstreaming is the key to breaking away from dependence on raw material exports and increasing the added value of the national economy," said Ardianto, who was previously the President Director of Timah and the President Director of Antam, at the METCONNEX 2026 press conference with the theme "Strengthening Indonesia's Metallurgy Industry: Towards Sustainable Growth and Global Competitiveness," Thursday (7/5).

Ardianto stated that major changes always bring diverse challenges. Addressing these challenges requires cross-sector collaboration, known as the Pentahelix concept, with the government acting as both rule-maker and regulator.

Then, entrepreneurs are the main actors driving the economy, academics provide the foundation for education and research, professional communities provide social support and specific expertise, and the media is the fifth crucial element in disseminating information and education.

He stated that without a massive public education process through the media and community involvement, efforts to achieve industrial independence would be extremely difficult. Solid collaboration would provide the government with the opportunity to pursue its strategic goals.

Ardianto explained that METCONNEX's strategic role in this context is as a strategic platform to support the *end-to-end* education process. Its primary focus is on improving process technology that supports waste reduction and data optimization.

Dengan pendekatan yang terintegrasi, MEDCONNEX diharapkan menjadi jembatan bagi percepatan hilirisasi dan pengelolaan sumber daya alam yang lebih bertanggung jawab bagi masa depan Indonesia.

Head of Committee METCONNEX 2026, Bara Dipol Yadi, menegaskan ajang ini bukan sekadar forum pertemuan tetapi juga sebagai ruang berbagi pengetahuan, pengalaman, serta perkembangan teknologi terkini di sektor pertambangan dan metalurgi.

"Ini bentuk kontribusi nyata komunitas alumni dan profesional dalam mendukung kemajuan industri nasional, sekaligus menjembatani kebijakan dan implementasi di dunia Mining dan Metalurgi Indonesia," ujarnya.

Di tengah transisi energi hijau, sinkronisasi teknologi dari hulu ke hilir dinilai krusial. Integrasi pertambangan dan pemurnian metalurgi diyakini mampu menciptakan efisiensi operasional, stabilitas pasokan, serta daya saing berkelanjutan.

Tantangan seperti fluktuasi harga komoditas, kebutuhan investasi teknologi pengolahan, hingga tuntutan dekarbonisasi mendorong industri mempercepat adopsi inovasi.

Ardianto, menyebut penguatan hilirisasi tak bisa jalan sendiri. Dalam konteks tersebut, integrasi yang lebih erat antara sektor pertambangan di bagian hulu dan sektor pengolahan dan pemurnian/metalurgi di bagian hilir akan menjadi kunci untuk menciptakan efisiensi operasional, stabilitas pasokan, serta daya saing industri yang berkelanjutan.

Kata dia, METCONNEX 2026 dirancang sebagai jembatan yang menghubungkan kebutuhan industri dengan inovasi teknologi. Forum ini mendorong pemangku kepentingan mengadopsi teknologi terkini, meningkatkan efisiensi proses, serta memastikan praktik industri selaras prinsip keberlanjutan.

With an integrated approach, MEDCONNEX is expected to be a bridge for accelerating downstreaming and more responsible natural resource management for Indonesia's future.

Head of Committee METCONNEX 2026, Bara Dipol Yadi, emphasized that this event is not just a meeting forum but also a space to share knowledge, experience, and the latest technological developments in the mining and metallurgy sector.

"This is a tangible contribution from the alumni and professional community in supporting the advancement of the national industry, while also bridging policy and implementation in the Indonesian Mining and Metallurgy sector," he said.

Amidst the green energy transition, synchronizing upstream and downstream technologies is considered crucial. Integrating mining and metallurgy refining is believed to create operational efficiency, supply stability, and sustainable competitiveness.


Challenges such as fluctuating commodity prices, the need for investment in processing technology, and the demands of decarbonization are driving the industry to accelerate the adoption of innovation.

Ardianto stated that strengthening downstream processing cannot be achieved in isolation. In this context, closer integration between the upstream mining sector and the downstream processing and refining/metallurgy sector will be key to creating operational efficiency, supply stability, and sustainable industrial competitiveness.

He said METCONNEX 2026 was designed to bridge industry needs with technological innovation. This forum encourages stakeholders to adopt the latest technologies, improve process efficiency, and ensure industrial practices align with sustainability principles.

Chairman ITB Metallurgy Alumni Association, Erika Silva, menambahkan, kegiatan ini merefleksikan komitmen memperkuat ekosistem hilirisasi.

Melalui forum ini, para pemangku kepentingan didorong untuk mengadopsi teknologi terkini, meningkatkan efisiensi proses, serta memastikan praktik industri yang selaras dengan prinsip keberlanjutan lingkungan.

Ekosistem pertambangan METCONNEX 2026 akan digelar di Jakarta International Convention Center (JICC) dengan agenda komprehensif. Pada 11 Mei 2026, diselenggarakan Technical Mineral Processing Short Course bagi profesional untuk mendalami metode pengolahan mineral terkini. Selanjutnya, 12–13 Mei 2026, berlangsung Conference & Exhibition yang mempertemukan pemimpin industri, pembuat kebijakan, dan inovator teknologi. 

Chairman of the ITB Metallurgy Alumni Association, Erika Silva, added that this activity reflects a commitment to strengthening the downstream ecosystem.

Through this forum, stakeholders are encouraged to adopt the latest technology, improve process efficiency, and ensure industrial practices are aligned with environmental sustainability principles.

The METCONNEX 2026 mining ecosystem will be held at the Jakarta International Convention Center (JICC) with a comprehensive agenda. On May 11, 2026, a Technical Mineral Processing Short Course will be held for professionals to explore the latest mineral processing methods. Furthermore, on May 12–13, 2026, a Conference & Exhibition will take place, bringing together industry leaders, policymakers, and technology innovators. 



Ahli Minta Pemerintah Tak Tergesa-gesa Ubah Skema Bagi Hasil Tambang

Verda Nano Setiawan, CNBC Indonesia

PERHIMPUNAN Ahli Pertambangan Indonesia (Perhapi) buka suara terkait rencana pemerintah menerapkan skema bagi hasil sektor minyak dan gas bumi (migas) ke industri pertambangan mineral dan batu bara (minerba).

Ketua Umum Perhimpunan Ahli Pertambangan Indonesia, Sudirman Widhy menilai pemerintah sebaiknya tidak tergesa-gesa dalam menerapkan kebijakan tersebut. Sebagaimana diketahui,...

Experts Ask the Government Not to Rush in Changing the Mining Profit Sharing Scheme

Verda Nano Setiawan, CNBC Indonesia

THE **INDONESIAN** Mining Experts Association (Perhapi) has spoken out regarding the government's plan to implement a profit-sharing scheme in the oil and gas (migas) sector for the mineral and coal (minerba) mining industry.

Sudirman Widhy, Chairman of the Indonesian Mining Experts Association, believes the government should not rush into implementing this policy. As is well known,...

Sebagaimana diketahui, di sektor migas terdapat skema cost recovery dan gross split yang digunakan dalam kontrak kerja sama antara pemerintah dan pihak swasta.

"Pemerintah perlu untuk mengkaji terlebih dahulu guna mendalami dampak yang akan terjadi bagi industri pertambangan jika skema tersebut diterapkan, jangan sampai kemudian malah membuat iklim industri pertambangan menjadi menurun," ujar Widhy kepada CNBC Indonesia, Kamis (7/5/2026).

Menurut dia, industri pertambangan merupakan sektor yang membutuhkan investasi sangat besar untuk menjalankan operasional. Karena itu, investor memerlukan kepastian hukum agar investasi yang ditanamkan dapat memberikan hasil yang positif.

"Dan untuk investasi yang besar tersebut tentu saja akan diperlukan waktu yang tidak sebentar untuk dapat memberikan hasil menguntungkan," kata dia.

Widhy menambahkan, jaminan kepastian hukum dan regulasi menjadi hal penting bagi para pengusaha yang telah menanamkan modal di sektor pertambangan. Pasalnya, para pelaku usaha telah melakukan kalkulasi investasi berdasarkan kondisi dan aturan yang berlaku saat ini, termasuk skema bagi hasil royalti.

Adapun, jika pemerintah mengubah skema bagi hasil pertambangan, lanjutnya, hal tersebut akan mempengaruhi perhitungan hasil investasi yang telah ditanamkan para pengusaha. Karena itu, Perhapi meminta pemerintah terlebih dahulu membuka ruang diskusi dengan para pelaku industri pertambangan sebelum menerapkan skema cost recovery maupun gross split di sektor minerba.

As is well known, the oil and gas sector uses cost recovery and gross split schemes in cooperation contracts between the government and the private sector.

"The government needs to conduct a thorough study to understand the potential impacts on the mining industry if this scheme is implemented. It should not lead to a decline in the mining industry," Widhy told CNBC Indonesia on Thursday (May 7, 2026).

According to him, the mining industry is a sector that requires significant investment to operate. Therefore, investors need legal certainty to ensure their investments yield positive returns.

"And for such a large investment, it will certainly take some time to produce profitable results," he said.

Widhy added that ensuring legal and regulatory certainty is crucial for entrepreneurs who have invested in the mining sector. This is because they have calculated their investments based on current conditions and regulations, including royalty profit-sharing schemes.

He continued, saying that if the government changes the mining profit-sharing scheme, it will affect the calculation of investment returns for entrepreneurs. Therefore, Perhapi is urging the government to first open discussions with mining industry players before implementing cost recovery or gross split schemes in the mineral and coal sector.

"Adalah penting bagi pemerintah agar sebaiknya mengajak bicara terlebih dahulu dan mendiskusikan dengan para pelaku industri pertambangan yang dalam hal ini bisa diwakili oleh asosiasi industri pertambangan seperti IMA, APBI, APNI dan yang lain mengenai rencana penerapan cost recovery atau gross split tersebut sebagai skema bagi hasil pada industri pertambangan," kata Widhy.

Sebelumnya, Menteri Energi dan Sumber Daya Mineral (ESDM) Bahlil Lahadalia menjelaskan pemerintah ingin memastikan bahwa baik tambang lama maupun baru dapat memberikan kontribusi maksimal terhadap pendapatan negara. Salah satu pendekatan yang dipertimbangkan adalah mengadopsi pola kerja sama seperti di sektor migas.

Adapun, di sektor migas setidaknya terdapat skema cost recovery dan gross split yang digunakan dalam kontrak kerja sama antara pemerintah dan pihak swasta. Model ini dinilai dapat menjadi referensi untuk diterapkan di sektor minerba.

"Dan ini kita akan memakai contoh seperti pembagian hasil daripada pengelolaan migas kita. Migas kita itu kan ada cost recovery, ada gross split, mungkin pola-pola itu yang akan coba kita exercise untuk kita bangun untuk bisa melakukan kerjasama dengan pihak swasta," katanya.

Meski demikian, Bahlil menegaskan bahwa skema konsesi tidak akan dihapus. Pemerintah tetap mempertahankan sistem tersebut, namun dengan penyesuaian agar porsi pendapatan negara bisa lebih besar dan lebih seimbang.

"Tetap konsesi, tetapi kita akan mengoptimalkan untuk pendapatan agar seimbanglah dengan negara, dan negara harusnya kan mendapatkan porsi yang lebih besar," ujar Bahlil. (pgr/pgr)

"It is important for the government to first engage in discussions with and engage with mining industry players, represented by mining industry associations such as IMA, APBI, APNI, and others, regarding the plan to implement cost recovery or gross split as a profit-sharing scheme in the mining industry," Widhy said.

Previously, Minister of Energy and Mineral Resources (ESDM), Bahlil Lahadalia, explained that the government wants to ensure that both existing and new mines can maximize their contribution to state revenue. One approach being considered is adopting a collaborative model similar to that in the oil and gas sector.

Meanwhile, in the oil and gas sector, cost recovery and gross split schemes are used in cooperation contracts between the government and the private sector. This model is considered a potential reference for implementation in the mineral and coal sector.

"And we'll use examples like profit sharing from our oil and gas management. Our oil and gas sector has cost recovery and gross split. Perhaps we'll try to develop these patterns to collaborate with the private sector," he said.

However, Bahlil emphasized that the concession scheme would not be abolished. The government would maintain the system, but with adjustments to ensure a larger and more balanced portion of state revenue.

"Concessions will remain, but we will optimize revenue to balance it with the state's, and the state should receive a larger share," Bahlil said. (pgr/pgr)



Harga Batu Bara Menanjak, Banyak Kabar Baik dari India & China

mae, CNBC Indonesia

HARGA batu bara menguat tipis ditopang beragam kabar positif.

Merujuk Refinitiv, harga batu bara pada perdagangan Kamis (7/5/2026) ditutup di US\$ 135,2 per ton atau naik 0,3%.

Penguatan ini menjadi kabar baik setelah harganya jatuh 3,5% pada Rabu.

Harga batu bara termal di China naik setelah sebelumnya dilaporkan tetap stabil.

Harga acuan indeks batu bara di wilayah produksi Yulin dengan kualitas 5.800 kcal/kg NAR tercatat stabil di level CNY 475 per ton (termasuk PPN), tidak berubah dibanding hari sebelumnya, namun turun CNY 9 per ton secara mingguan.

Artinya, harga batu bara di tambang (mine-mouth) di Shaanxi tidak mengalami perubahan harian, mencerminkan kondisi pasar yang relatif tenang dan seimbang antara permintaan dan pasokan.

Permintaan dari pembeli industri masih moderat sementara aktivitas perdagangan cenderung hati-hati. Pasar berada dalam kondisi stagnan karena tidak ada dorongan kuat baik dari sisi permintaan maupun pasokan.

Seorang pelaku pasar menyebutkan bahwa meskipun penjualan masih berjalan karena pelanggan tetap, kondisi pasar tahun ini cenderung lemah sehingga harga sulit naik tinggi.

Harga batu bara termal Afrika Selatan di pelabuhan India menunjukkan tren yang beragam secara mingguan pada Kamis kemarin, meskipun harga penawaran internasional cenderung naik akibat meningkatnya biaya angkut (freight) dan energi.

Coal Prices Rise, Lots of Good News from India & China

mae, CNBC Indonesia

COAL prices rose slightly, supported by various positive news.

According to Refinitiv, coal prices closed at US\$135.2 per ton on Thursday (May 7, 2026), up 0.3%.

This strengthening is good news after the price fell 3.5% on Wednesday.

Thermal coal prices in China rose after previously being reported as remaining stable.

The benchmark price for coal index in the Yulin production area with a quality of 5,800 kcal/kg NAR was recorded stable at CNY 475 per ton (including VAT), unchanged from the previous day, but down CNY 9 per ton on a weekly basis.

This means that coal prices at the mine-mouth in Shaanxi have not changed daily, reflecting relatively calm market conditions and a balance between demand and supply.

Demand from industrial buyers remains moderate, while trading activity tends to be cautious. The market is stagnant due to the lack of strong momentum from either the demand or supply side.

A market player said that although sales are still ongoing due to loyal customers, market conditions this year tend to be weak so that prices are difficult to rise high.

South African thermal coal prices at Indian ports showed a mixed weekly trend on Thursday, although international bids tended to rise due to rising freight and energy costs.

Namun meskipun ada kenaikan harga penawaran, aktivitas pasar tetap sangat terbatas karena pembeli enggan membeli di level harga tinggi.

Selain itu, impor India untuk batu bara non-kokas dari Afrika Selatan turun tajam menjadi 1,97 juta ton pada April, dari 3,48 juta ton pada Maret, atau turun 43,4% secara bulanan. Penurunan ini mencerminkan lemahnya permintaan industri serta meningkatnya preferensi terhadap batu bara domestik.

Kenaikan biaya angkut dorong harga global

Pelaku pasar menyebut harga batu bara internasional menguat setelah kenaikan harga gas dan minyak mentah, yang mendorong tekanan naik dari indeks batu bara Indonesia (HBA) serta pasar freight. Biaya pengiriman yang tetap tinggi juga meningkatkan biaya landed (biaya sampai pelabuhan tujuan).

Permintaan dari sektor sponge iron dan baja masih lemah, menekan pasar batu bara impor.

Pelaku pasar mengatakan pembelian masih berbasis kebutuhan (need-based), dengan strategi wait and see karena harga baja melemah dan permintaan produk baja jadi juga lesu. Aktivitas pembelian di pasar baja setengah jadi maupun jadi tetap lemah, sehingga konsumsi bahan baku ikut tertekan. (mae/mae)

However, despite the increase in bid prices, market activity remains very limited as buyers are reluctant to purchase at high price levels.

Additionally, India's imports of non-coking coal from South Africa fell sharply to 1.97 million tonnes in April, down 43.4% month-on-month from 3.48 million tonnes in March. This decline reflects weak industrial demand and a growing preference for domestic coal.

Rising freight costs push up global prices

Market participants reported strengthening international coal prices following rising gas and crude oil prices, which put upward pressure on the Indonesian Coal Index (HBA) and the freight market. Consistently high shipping costs also increased landed costs (costs to the port of destination).

Demand from the sponge iron and steel sectors remains weak, putting pressure on the imported coal market.

Market participants stated that purchasing is still need-based, adopting a wait-and-see approach due to weakening steel prices and sluggish demand for finished steel products. Purchasing activity in the semi-finished and finished steel markets remains weak, depressing raw material consumption. (mae/mae)

BT Bloomberg Technoz

Purbaya Pastikan Aturan Baru DHE SDA Berlaku 1 Juni 2026

Mis Fransiska Dewi

MENTERI Keuangan Purbaya Yudhi Sadewa memastikan kebijakan Devisa Hasil Ekspor Sumber Daya Alam (DHE SDA) akan berlaku 1 Juni 2026. Akan tetapi,...

Purbaya Ensures New DHE SDA Regulations Will Take Effect

June 1, 2026

Mis Fransiska Dewi

FINANCE Minister Purbaya Yudhi Sadewa confirmed that the Foreign Exchange from Natural Resource Exports (DHE SDA) policy will take effect on June 1, 2026. However,...

Akan tetapi, Purbaya belum bisa memerinci detail aturan baru yang mewajibkan eksportir menempatkan dana hasil ekspor di perbankan Himbara serta mengonversi maksimal 50% ke mata uang rupiah tersebut.

"Sudah diputuskan berlaku 1 Juni 2026. Negara mananya nanti dilihat ketika kita *publish* peraturan DHE-nya," kata Purbaya dalam konferensi pers Komite Stabilitas Sistem Keuangan (KSSK) di Jakarta, Kamis (7/5/2026).

Sebelumnya, Menteri Koordinator Bidang Perekonomian Airlangga Hartarto mengatakan ketentuan tersebut diatur melalui revisi Peraturan Pemerintah (PP) Nomor 36 tentang DHE SDA.

"Yang terakhir terkait dengan regulasi devisa hasil ekspor sumber daya alam, jadi revisi perubahan terhadap PP 36 sudah difinalisasikan dan akan diberlakukan per 1 Juni 2026," ujar Airlangga di Istana Kepresidenan, Selasa (5/5/2026).

Melalui beleid anyar ini, eksportir sektor sumber daya alam diwajibkan memasukkan DHE ke perbankan Himbara. "Jadi perubahan bahwa DHE SDA wajib masuk ke Himbara dan dikonversi ke rupiah maksimum 50%," tuturnya.

Dengan skema itu, eksportir tak lagi hanya diwajibkan menempatkan devisa di dalam negeri, tetapi juga diminta mengalihkan sebagian dana ke rupiah agar suplai valuta asing dan likuiditas rupiah di pasar keuangan lebih terjaga.

Kebijakan ini menjadi penguatan dari aturan DHE SDA yang selama ini sudah berlaku. Sebelumnya, pemerintah mewajibkan eksportir menempatkan 100% devisa hasil ekspor di sistem keuangan nasional untuk jangka waktu tertentu sebagai bagian dari upaya menambah cadangan devisa dan menahan volatilitas rupiah.

However, Purbaya could not yet provide details of the new regulation, which requires exporters to place export proceeds in Himbara banks and convert a maximum of 50% into rupiah.

"It has been decided that it will take effect on June 1, 2026. We will see which countries will be involved when we *publish* the DHE regulations," Purbaya said at a press conference with the Financial System Stability Committee (KSSK) in Jakarta, Thursday (May 7, 2026).

Previously, Coordinating Minister for Economic Affairs Airlangga Hartarto said that these provisions were regulated through a revision of Government Regulation (PP) Number 36 concerning DHE SDA.

"The last one concerns the regulation of foreign exchange proceeds from natural resource exports. Therefore, the revised amendments to Government Regulation 36 have been finalized and will be implemented on June 1, 2026," Airlangga said at the Presidential Palace on Tuesday (May 5, 2026).

Under this new policy, exporters in the natural resource sector are required to deposit DHE (Exported Export Proceeds) into Himbara banks. "So, the change is that DHE SDA must be deposited into Himbara and converted to rupiah at a maximum of 50%," he said.

Under this scheme, exporters are no longer only required to place foreign exchange domestically, but are also asked to transfer some funds to rupiah to better maintain the supply of foreign exchange and rupiah liquidity in the financial market.

This policy reinforces the existing DHE SDA regulations. Previously, the government required exporters to place 100% of their export proceeds in the national financial system for a specified period as part of an effort to increase foreign exchange reserves and curb rupiah volatility.

Kini, pemerintah mewajibkan penempatan di bank-bank pelat merah serta membuka ruang konversi hingga setengah dari dana tersebut ke mata uang domestik.

Namun, Airlangga menegaskan ada perlakuan berbeda untuk sektor ekstraktif minyak dan gas bumi. Untuk sektor ini, ketentuan penempatan dana masih mengikuti skema lama.

"Dan juga terkait dengan sektor ekstraktif atau oil and gas itu berlaku seperti yang sekarang yaitu yang berlaku tiga bulan," kata Airlangga.

Artinya, devisa hasil ekspor sektor migas masih tetap mengikuti kewajiban penempatan selama tiga bulan dan tidak langsung tunduk pada skema konversi baru seperti sektor SDA lainnya. (mfd/ell)

The government now requires placement in state-owned banks and allows up to half of these funds to be converted into domestic currency.

However, Airlangga emphasized that there is a different treatment for the oil and gas extractive sector. For this sector, the provisions for fund placement still follow the old scheme.

"And also regarding the extractive sector or oil and gas, the current regulation, which is valid for three months, applies," said Airlangga.

This means that foreign exchange proceeds from oil and gas exports remain subject to the three-month placement requirement and are not immediately subject to the new conversion scheme like other natural resource sectors. (mfd/ell)

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Pertambangan Lesu Awal 2026, Target PNBP Minerba Rawan Meleset

Azura Yumna Ramadani Purnama

PERHIMPUNAN Ahli Pertambangan Indonesia (Perhapi) mengingatkan target setoran penerimaan negara bukan pajak (PNBP) dari sektor mineral dan batu bara (minerba) pada tahun ini rentan gagal tercapai, sebab kinerja industri tambang berkontraksi cukup dalam pada kuartal I-2026.

Ketua Dewan Penasihat Perhapi Rizal Kasli berpendapat lesunya kinerja pertambangan pada awal tahun ini dapat membuat PNBP dari sektor minerba sepanjang tahun hanya tercapai sekitar 90% dari target 2026 yang dibidik senilai Rp134 triliun.

Mining Sluggish in Early 2026, Minerba PNBP Targets at Risk of Missing

Azura Yumna Ramadani Purnama

THE **INDONESIAN** Mining Experts Association (Perhapi) has warned that the non-tax state revenue (PNBP) target from the minerals and coal (minerba) sector this year is vulnerable to failure, as the mining industry's performance contracted significantly in the first quarter of 2026.

Perhapi Advisory Board Chairman Rizal Kasli believes that the sluggish mining performance at the start of this year could result in PNBP from the mineral and coal sector throughout the year only reaching around 90% of the 2026 target of Rp134 trillion.

Dia mengelaborasi, pada awal tahun ini, produksi emas dari tambang PT Freeport Indonesia (PTFI) mengalami penurunan negara longsor yang terjadi tahun lalu.

Selain itu, pemangkasan produksi batu bara juga terbilang cukup dalam mencapai 150 juta ton menjadi 600 juta ton.

"Tujuan pemerintah mengurangi kuota produksi lebih kepada menjaga kestabilan harga komoditas akibat *oversupply* di pasar global. Namun, dampaknya terasa juga kepada *cashflow* dan keuntungan perusahaan," kata Rizal ketika dihubungi, Kamis (7/5/2026).

"Untuk target PNBPN yang sebesar Rp134 triliun kemungkinan tercapai sekitar Rp120-Rp130 triliun atau 90%-97% dari target," lanjut dia.

Rizal memprediksi setoran PNBPN dari royalti batu bara dengan asumsi produksi 600 juta ton dan harga berlaku saat ini, dapat mencapai sekitar Rp90 triliun.

Dia juga menekankan bahwa saat ini pasar batu bara sebenarnya tidak sedang lesu, sebab gejolak di Timur Tengah meningkatkan permintaan komoditas tersebut.

"Filipina dikabarkan menambah pesanan batu bara dari Indonesia. Harga batu bara juga melonjak karena faktor tersebut," ujar Rizal.

Sekadar informasi, Badan Pusat Statistik (BPS) mencatat ekonomi Indonesia pada triwulan I-2026 tumbuh sebesar 5,61% secara *year on year* (yoy).

Berdasarkan lapangan usaha, industri pertambangan dan penggalian berkontraksi 21,4%, serta industri pengadaan listrik dan gas yang mengalami kontraksi sebesar 0,99%.

Kontraksi di industri pertambangan justru terjadi saat lapangan usaha lainnya mencatatkan pertumbuhan pada awal tahun ini. Industri pengolahan tumbuh 5,04%;...

He elaborated that at the beginning of this year, gold production from the PT Freeport Indonesia (PTFI) mine experienced a decline due to a landslide that occurred last year.

In addition, coal production cuts are also quite deep, reaching 150 million tons to 600 million tons.

Regarding the reduction, Rizal said, "The government's goal in reducing production quotas is more to maintain commodity price stability due to *oversupply* in the global market. However, the impact is also being felt on *cash flow* and company profits."

"The PNBPN target of Rp134 trillion is likely to be achieved at around Rp120-Rp130 trillion, or 90%-97% of the target," he continued.

Rizal predicts that PNBPN deposits from coal royalties, assuming production of 600 million tons and current prices, could reach around IDR 90 trillion.

He also emphasized that the coal market is not currently sluggish, as the turmoil in the Middle East has increased demand for the commodity.

"The Philippines is reportedly increasing its coal orders from Indonesia. Coal prices have also surged due to this factor," Rizal said.

For your information, the Central Statistics Agency (BPS) recorded that the Indonesian economy grew by 5.61% year-on-year (yoy) in the first quarter of 2026 .

Based on business sector, the mining and quarrying industry contracted by 21.4%, and the electricity and gas procurement industry contracted by 0.99%.

The contraction in the mining industry occurred even as other business sectors recorded growth at the start of the year. The manufacturing industry grew 5.04%;...

Industri pengolahan tumbuh 5,04%; perdagangan, reparasi mobil dan sepeda motor tumbuh 6,26%; pertanian, kehutanan, dan perikanan tumbuh 4,97%; transportasi dan pergudangan tumbuh 8,04%; penyediaan akomodasi dan makanan minuman tumbuh 13,14%; serta jasa lainnya tumbuh 9,91%.

Kementerian Energi dan Sumber Daya Mineral (ESDM) memangkas target produksi batu bara pada tahun ini di dalam RKAB 2026. Produksi batu bara pada RKAB 2026 menjadi sekitar 600 juta ton, turun dari realisasi produksi pada 2025 sebanyak 790 juta ton.

Ekspor Anjlok

Adapun, Asosiasi Pertambangan Batu Bara Indonesia (APBI) mencatat ekspor batu bara Indonesia pada kuartal I-2026 mencapai 112 juta ton atau turun 10,5% dibandingkan dengan periode yang sama tahun lalu.

APBI menyatakan permintaan batu bara global pada awal tahun ini sedang melemah, terutama dari negara tujuan ekspor utama Indonesia seperti China dan India.

Kasus kuota produksi dalam Rencana Kerja dan Anggaran Biaya (RKAB) 2026, Rizal memprediksi kebijakan tersebut bakal membuat penambang melakukan efisiensi penggunaan alat berat dan mengurangi jumlah pekerja tambang.

The manufacturing industry grew 5.04%; trade and repair of automobiles and motorcycles grew 6.26%; agriculture, forestry, and fisheries grew 4.97%; transportation and warehousing grew 8.04%; accommodation and food and beverage services grew 13.14%; and other services grew 9.91%.

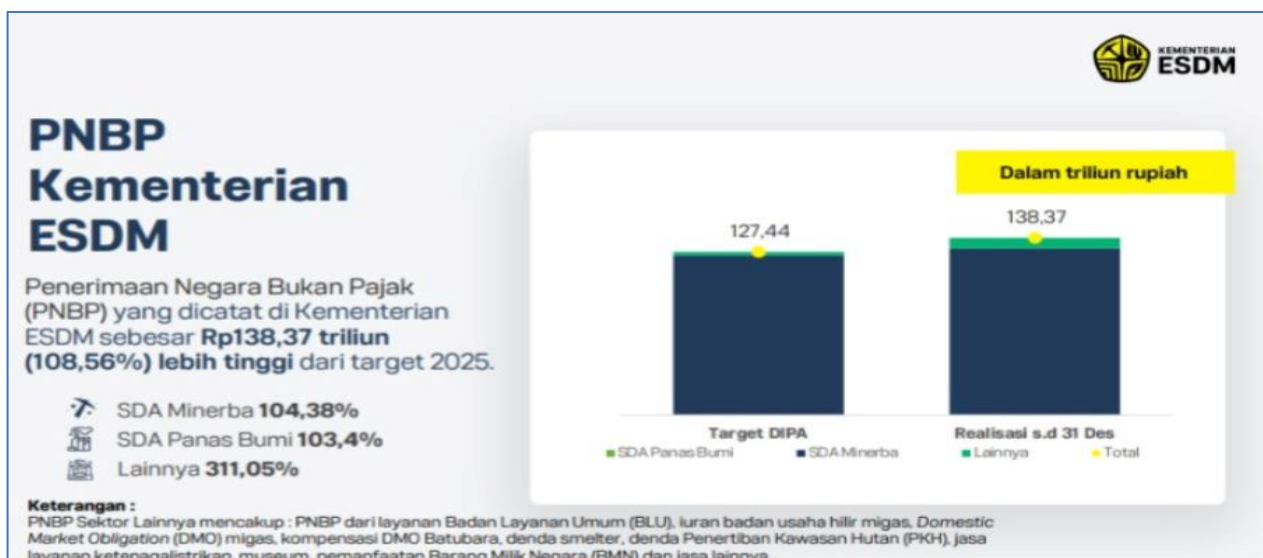
The Ministry of Energy and Mineral Resources (ESDM) has cut its coal production target for this year in its 2026 Work Plan and Budget (RKAB). Coal production in the 2026 RKAB is expected to be around 600 million tons, down from the 2025 production target of 790 million tons.

Exports Plummet

Meanwhile, the Indonesian Coal Mining Association (APBI) recorded that Indonesian coal exports in the first quarter of 2026 reached 112 million tons, a 10.5% decrease compared to the same period last year.

APBI stated that global coal demand at the beginning of this year was weakening, particularly from Indonesia's main export destinations, such as China and India.

Regarding the production quota in the 2026 Work Plan and Budget (RKAB), Rizal predicted that this policy would make miners use heavy equipment more efficiently and reduce the number of mine workers.



Sekadar informasi, Kementerian ESDM menargetkan setoran penerimaan negara bukan pajak atau PNBP sektor minerba mencapai Rp134 triliun tahun ini. Target itu naik 7,63% dari target PNBP sektor minerba sepanjang 2025 yang dipatok senilai Rp124,5 triliun.

Adapun, sepanjang tahun lalu Kementerian ESDM mencatat penerimaan PNBP dari sektor ESDM—khususnya tambang atau minerba mencapai Rp138,37 triliun.

Realisasi tersebut setara dengan 108,56% di atas target Daftar Isian Pelaksanaan Anggaran (DIPA) tahun lalu yang senilai Rp127,44 triliun.

Adapun, Kementerian ESDM mencatat produksi batu bara nasional sepanjang 2025 mencapai 790 juta ton.

Realisasi produksi batu bara itu anjlok 5,5% dari capaian sepanjang 2024 sebesar 836 juta ton. Kendati demikian, produksi itu lebih tinggi dari target yang dipatok tahun ini sebesar 739,6 juta ton.

Sebagian besar produksi itu disalurkan untuk pasar ekspor, sekitar 514 juta ton atau 65,1% dari total produksi.

Sementara itu, serapan batu bara untuk pasar domestik atau *domestic market obligation* (DMO) mencapai 254 juta ton atau 32%. Stok batu bara yang dicadangkan sampai akhir 2025 sebesar 22 juta ton atau 2,8% dari keseluruhan produksi tambang. (azr/wdh)

For your information, the Ministry of Energy and Mineral Resources is targeting non-tax state revenue (PNBP) from the mineral and coal sector to reach Rp134 trillion this year. This represents a 7.63% increase from the 2025 PNBP target of Rp124.5 trillion.

Meanwhile, throughout last year, the Ministry of Energy and Mineral Resources recorded that PNBP revenue from the ESDM sector—particularly mining or mineral and coal—reached IDR 138.37 trillion.

This realization is equivalent to 108.56% above the target of last year's Budget Implementation List (DIPA) which was worth IDR 127.44 trillion.

Meanwhile, the Ministry of Energy and Mineral Resources recorded that national coal production throughout 2025 will reach 790 million tons.

Actual coal production fell 5.5% from the 836 million tons achieved in 2024. However, this production exceeded this year's target of 739.6 million tons.

Most of the production is channeled to the export market, around 514 million tonnes or 65.1% of total production.

Meanwhile, coal absorption for the domestic market, or *domestic market obligation* (DMO), reached 254 million tons, or 32%. Reserved coal stocks until the end of 2025 are 22 million tons, or 2.8% of total mine production. (azr/wdh)

REPUBLIK 

**Permintaan Emas Dunia Naik,
BUMN Tambang Didorong
Tingkatkan Produksi**

Peningkatan kapasitas produksi emas penting untuk memenuhi kebutuhan masyarakat

Reporter: Frederikus Dominggus Bata/
Redaksi: Intan Pratiwi

PENGAMAT BUMN sekaligus Direktur NEXT Indonesia Center Herry Gunawan mendorong perusahaan tambang emas milik negara meningkatkan kapasitas produksi di tengah tren kenaikan permintaan emas global yang terus mencetak rekor. Ia menilai momentum tersebut dapat menjadi peluang bagi BUMN pertambangan untuk memperkuat profit sekaligus memperbaiki neraca perdagangan emas nasional.

Menurut Herry, lonjakan permintaan emas dunia menjadi sinyal positif bagi industri pertambangan emas nasional. Kenaikan harga emas yang terjadi seiring meningkatnya permintaan dapat mendorong ekspansi produksi dalam negeri.

"Di saat demand terhadap emas tinggi, tentu menjadi sentimen positif bagi BUMN tambang emas. Kondisi seperti itu akan mendorong kenaikan harga. Karena itu, peningkatan produksi menjadi sangat penting," ujarnya di Jakarta, dikutip Kamis (7/5/2026).

Berdasarkan data World Gold Council, total permintaan emas global pada kuartal I 2026, termasuk transaksi over-the-counter (OTC), naik 2 persen secara tahunan menjadi 1.231 ton. Di tengah lonjakan harga emas, nilai permintaan kuartalan melonjak 74 persen menjadi rekor baru sebesar 193 miliar dolar AS.

**Global Gold Demand Rises,
State-Owned Mining Companies
Urged to Increase Production**

Increasing gold production capacity is crucial to meet the community's needs.

Reporter: Frederikus Dominggus Bata /
Editor: Intan Pratiwi

STATE-owned enterprise observer and Director of the NEXT Indonesia Center, Herry Gunawan, is urging state-owned gold mining companies to increase production capacity amidst record-breaking global gold demand. He believes this momentum presents an opportunity for state-owned mining companies to boost profits and improve the national gold trade balance.

According to Herry, the surge in global gold demand is a positive sign for the national gold mining industry. The increase in gold prices, coupled with increased demand, could encourage the expansion of domestic production.

"When demand for gold is high, it's certainly a positive sentiment for state-owned gold mining companies. Such conditions will drive up prices. Therefore, increasing production is crucial," he said in Jakarta, as quoted on Thursday (May 7, 2026).

According to data from the World Gold Council, total global gold demand in the first quarter of 2026, including over-the-counter (OTC) transactions, rose 2 percent year-on-year to 1,231 tonnes. Amid surging gold prices, quarterly demand surged 74 percent to a new record of US\$193 billion.

Permintaan emas batangan dan koin juga meningkat tajam menjadi 474 ton atau naik 42 persen. Capaian tersebut menjadi kuartal tertinggi kedua sepanjang sejarah, dengan investor Asia menjadi pendorong utama melalui pembelian berbagai produk investasi emas.


Herry melihat kondisi tersebut memberi dua keuntungan strategis bagi Indonesia. Selain membuka peluang peningkatan keuntungan bagi BUMN tambang, peningkatan produksi emas nasional juga dapat membantu mengurangi tekanan defisit perdagangan emas.

Sejak 2021, Indonesia tercatat mengalami defisit perdagangan emas dan berstatus net importer. Kondisi tersebut dipicu impor emas yang lebih besar dibandingkan ekspor guna memenuhi kebutuhan pasar domestik.

Seiring meningkatnya kebutuhan emas nasional, anggota Grup MIND ID, PT Aneka Tambang Tbk (Antam), mulai memperkuat kapasitas pengolahan logam mulia di dalam negeri. Salah satunya melalui pembangunan pabrik manufaktur emas logam mulia di Gresik.

Antam membangun fasilitas dengan kapasitas produksi hingga 30 ton per tahun. Kehadiran pabrik tersebut akan menambah kapasitas produksi kepingan emas Antam di Pulogadung, Jakarta, yang saat ini mencapai 40 ton per tahun.

Dalam rantai pasok nasional, pasokan emas batangan berasal dari tambang emas Antam di Jawa Barat sekitar 1 ton per tahun serta Precious Metal Refinery (PMR) PT Freeport Indonesia yang mampu mengolah lumpur anoda menjadi emas batangan sekitar 50 hingga 60 ton per tahun.

Melalui rantai pasok industri yang semakin terintegrasi, Pemerintah bersama Grup MIND ID memperkuat ekosistem bullion nasional untuk memenuhi kebutuhan emas logam mulia domestik yang diperkirakan mencapai sekitar 70 ton per tahun dan terus meningkat. 

Demand for gold bars and coins also rose sharply to 474 tons, a 42 percent increase. This was the second-highest quarter in history, with Asian investors the primary driver, purchasing various gold investment products.


Herry sees this situation as offering two strategic advantages for Indonesia. Besides opening up opportunities for increased profits for state-owned mining companies, increased national gold production could also help reduce the pressure on the gold trade deficit.

Since 2021, Indonesia has experienced a gold trade deficit and is a net importer. This situation is driven by higher gold imports than exports to meet domestic market demand.

As national gold demand increases, MIND ID Group member PT Aneka Tambang Tbk (Antam) has begun strengthening its domestic precious metal processing capacity. One way to do this is by building a gold manufacturing plant in Gresik.

Antam is building a facility with a production capacity of up to 30 tons per year. The factory will expand Antam's gold coin production capacity in Pulogadung, Jakarta, which currently stands at 40 tons per year.

In the national supply chain, the supply of gold bullion comes from the Antam gold mine in West Java, approximately 1 ton per year, as well as PT Freeport Indonesia's Precious Metal Refinery (PMR), which is capable of processing anode sludge into gold bullion of approximately 50 to 60 tons per year.

Through an increasingly integrated industrial supply chain, the Government, together with the MIND ID Group, is strengthening the national bullion ecosystem to meet domestic gold demand, which is estimated to reach around 70 tons per year and continues to increase. 

detikfinance

Logam Tanah Jarang Harta Karun RI, Butuh Teknologi Terkini buat Eksplorasi

Heri Purnomo – detikFinance

POTENSI logam tanah jarang atau rare earth element (REE) di Indonesia bakal menjadi salah satu pembahasan dalam ajang METCONNEX 2026 yang bakal digelar mulai 11-13 Mei 2026.

Mantan Dirut Antam dan Chairman Ikatan Alumni Tambang (IAT) Institut Teknologi Bandung (ITB) Achmad Ardianto menjelaskan soal logam tanah jarang penting seiring dorongan pemerintah mempercepat hilirisasi dan pengembangan industri strategis nasional.

Terlebih, saat ini Indonesia tengah aktif melakukan eksplorasi untuk mengetahui besaran cadangan logam tanah jarang nasional. Oleh karena itu, pelibatan akademisi, hingga para ahli pertambangan dalam proses ini dinilai penting.

"Kita ingin mengekspos isu itu, Pak Prabowo sudah ngomong membentuk Badan Industri Mineral (BIM) membentuk Perminas. Nah, dengan adanya BIM dan Perminas tentu saja profesi-profesi profesional yang mengetahui cara mengeksplorasi logam tanah jarang, yang mengetahui cara menambang logam tanah jarang, yang mengetahui cara mengolah logam tanah jarang dengan teknologi-teknologi terkini itu bisa mengetahui dan bisa melakukan melakukan alignment terhadap upaya pemerintah," ujarnya di Jakarta, Kamis (7/6/2026).

Lebih lanjut, Achmad juga menyoroti transformasi digital di sektor pertambangan, termasuk penerapan artificial intelligence (AI) dan kebutuhan peningkatan kompetensi tenaga kerja.

Rare Earth Metals Are Indonesia's Treasure, Requiring the Latest Technology for Exploration

Heri Purnomo – detikFinance

THE POTENTIAL of rare earth elements (REE) in Indonesia will be one of the topics discussed at the METCONNEX 2026 event, which will be held from May 11-13, 2026.

Former Antam CEO and Chairman of the Mining Alumni Association (IAT) of the Bandung Institute of Technology (ITB), Achmad Ardianto, explained that rare earth metals are important as the government pushes to accelerate downstreaming and the development of national strategic industries.

Furthermore, Indonesia is currently actively exploring to determine the extent of its national rare earth reserves. Therefore, the involvement of academics and mining experts in this process is considered crucial.

"We want to expose this issue. Mr. Prabowo has already spoken about establishing the Mineral Industry Agency (BIM) and the National Mineral and Mineral Resources Agency (Perminas). With BIM and Perminas, professionals who know how to explore rare earth metals, mine them, and process them with the latest technologies will be able to understand and align with government efforts," he said in Jakarta on Thursday (June 7, 2026).

Furthermore, Achmad also highlighted digital transformation in the mining sector, including the implementation of artificial intelligence (AI) and the need to improve workforce competency.

Penggunaan teknologi di industri tambang tidak dapat dihindari karena mampu meningkatkan efisiensi dan daya saing industri nasional. Namun, ia mengingatkan Indonesia perlu menyiapkan sumber daya manusia agar tidak tertinggal dalam adopsi teknologi baru.

"Nah, kalau kita tidak antisipatif terhadap teknologi baru yang digunakan di industri pertambangan maka akan ada satu titik di mana kita ketinggalan," ujarnya.

Sebagai informasi, METCONNEX 2026 merupakan platform strategis yang mempertemukan para pemangku kepentingan utama industri pertambangan dan pengolahan untuk bersinergi dalam satu ekosistem kolaboratif.

Mengusung tema "Strengthening Indonesia's Metallurgy Industry: Towards Sustainable Growth and Global Competitiveness", ajang ini difokuskan untuk mendorong sinergi dalam meningkatkan nilai tambah produk tambang, mineral dan logam nasional. (hrp/hns)

The use of technology in the mining industry is inevitable, as it can increase the efficiency and competitiveness of the national industry. However, he cautioned that Indonesia needs to prepare its human resources to ensure it remains ahead of the curve in adopting new technologies.

"Well, if we don't anticipate new technologies used in the mining industry, there will be a point where we will be left behind," he said.

For your information, METCONNEX 2026 is a strategic platform that brings together key stakeholders in the mining and processing industry to synergize in a collaborative ecosystem.

Carrying the theme "Strengthening Indonesia's Metallurgy Industry: Towards Sustainable Growth and Global Competitiveness," this event focused on fostering synergy in increasing the added value of national mining, mineral, and metal products. (hrp/hns)

KITCO NEWS

Tsingshan seeks LME listing for Indonesian aluminum

By Reuters

CHINA's Tsingshan Holding Group has applied for aluminum from its Hua Chin smelting joint venture in Indonesia to be deliverable on the London Metal Exchange, a notice from the bourse showed on Thursday.

If accepted, Hua Chin, where Tsingshan is partnered by fellow Chinese firm Huafon Group, would become only the second Indonesian high-grade primary aluminum brand to be accepted by the LME after that of state-owned Inalum.

The application comes as Indonesia ramps up production and exports of aluminum, potentially offsetting shortages caused by the war in the Middle East.

The second phase of Hua Chin, located on the island of Sulawesi, started up this year; the project has annual capacity of 480,000 metric tons of aluminum ingots, according to the LME notice.

Tsingshan is best known as the world's biggest nickel producer; nickel cathodes produced by its Indonesian affiliate PT Eternal Nickel Industry are deliverable against the LME's nickel contract.

(By Tom Daly and Dylan Duan; Editing by Mark Potter)



Metso strengthens its presence in Argentina to support the mining industry

Published by Jody Dodgson, Editorial Assistant

METSO is expanding its presence in Argentina with new local capabilities. The investment will reinforce Metso's long-term commitment to the development of the mining industry and local talent in Argentina.


Metso is now entering a new phase of growth in San Juan, the mining hub famous especially for its copper and gold production. During the second quarter of 2026, Metso will open a new office to enable closer, more agile, and more strategic collaboration with customers.

As a next step, Metso is investing in robust infrastructure designed for services and specialised technical support to ensure availability and faster response times. Strategically located, the San Juan site enables Metso to reduce critical distances, improve response times, and proactively support customers' operational needs.

New capabilities respond directly to the evolving needs of the mining industry, including greater efficiency, timely support, localised competence development, and increasingly integrated solutions.

"This investment clearly reflects our long-term vision for Argentina and South America as a whole," says Eduardo Nilo Arenas, President of Metso South America.

"It is not only about expanding capabilities, but about transforming the way we support our customers: being closer to their operations, responding faster, and delivering increasingly intelligent and integrated solutions. San Juan is now a strategic hub from which we will help drive more efficient, sustainable, and competitive mining across the region."

Metso is also evaluating further stages of capacity expansion as part of its long-term commitment to support the development of mining in Argentina. 

Gold price drops from two-week high

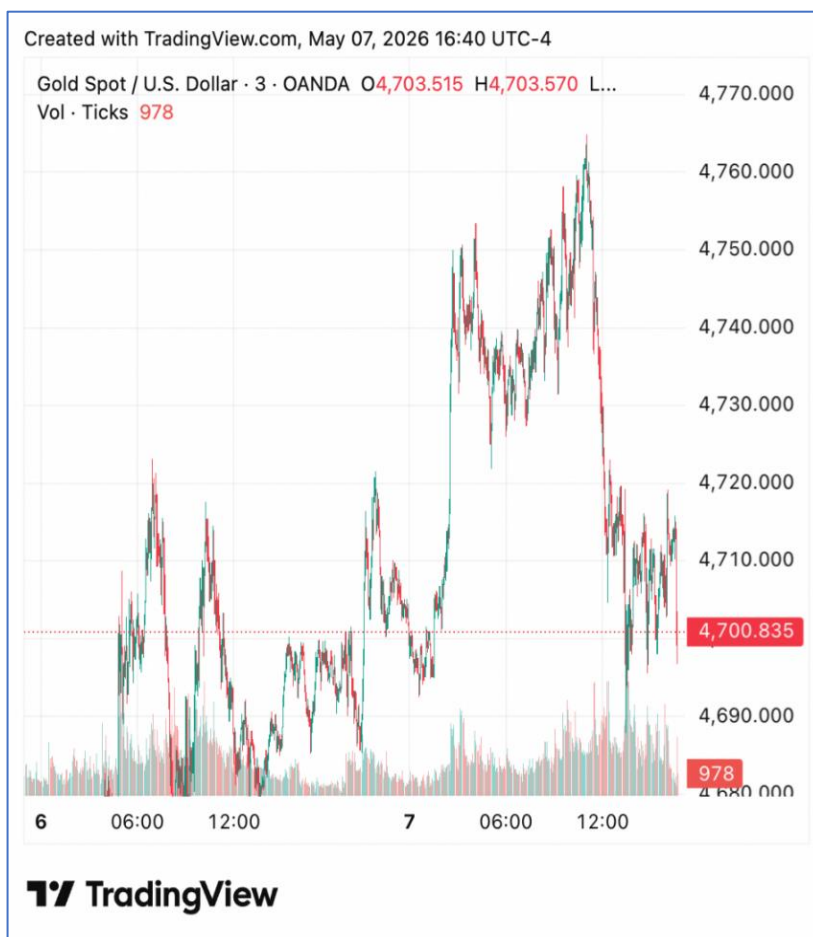
By: Staff Writer

GOLD set a two-week high before noon Thursday on optimism over a U.S.-Iran peace deal before losing most of its gains late in the North American trading day.

Spot gold rose 1.7% to over \$4,764 an oz. during morning trading hours before sliding to \$4,700 an oz. around 4:40 pm ET, about the same as on Wednesday. U.S. gold futures were trading at about \$4,720 an oz. in New York.


Bullion's early rebound came after reports that Iran is reviewing a 14-point proposal by the U.S. government to end the war in the Middle East, which lowered benchmark oil prices to less than \$100 a barrel.

But they surged again later, Treasury yields turned higher, questions arose about the stability of peace talks, and gold hit a level where selling and profit-taking took over.



The 10-week-long conflict has so far choked off vital energy supplies flowing through the Strait of Hormuz, raising alarm bells on global inflation. This, in turn, forced central banks to suspend their monetary easing cycles, adding pressure on zero-yield assets like gold, which has fallen 10% during the war.

Data due

In the near term, attention will be placed on upcoming US data releases, which could provide further indication on the Federal Reserve's policy path. The presidents of both the Chicago and St. Louis Feds have warned that inflation remains above the targeted 2%, signalling that an interest rate cut may have to wait. 

Investing.com


China adds gold reserves for 18th month in April

Editor: Senad Karaahmetovic

CHINA's central bank continued its gold purchasing streak in April, marking the 18th consecutive month of additions to its reserves, according to data released by the People's Bank of China on Thursday.

The country's gold reserves reached 74.64 million fine troy ounces by the end of April, up from 74.38 million ounces in March. The total value of China's gold reserves stood at \$344.17 billion at the end of last month, compared to \$342.76 billion the previous month.

The increase in the value of China's gold reserves represents a rebound following the first decline in months during March, which was attributed to a steep fall in gold prices.

Spot gold fell for the second consecutive month in April, facing pressure from concerns that higher oil prices linked to the Iran war would keep inflation elevated and force central banks to delay rate cuts. The metal recovered late in April on a softer dollar and easing crude prices. 



Strong gold and copper prices support explosive demand

By Adrian Black

SOARING metals prices have helped the world's biggest explosives maker post record first half earnings, but the result has been dampened by a supplier outage.

Melbourne-based Orica said supply concerns for gold and copper - which were trading at record-high prices in recent months - had underpinned demand for its products, including blasting systems and chemicals for the mining industry.

"Clearly, there is some concern in the market about supply and reliability, and commodity prices are still very attractive," managing director and chief executive Sanjeev Gandhi said at an earnings call on Thursday.

Iron ore prices were also historically high, and coal prices have rebounded in recent months in the wake of the Persian Gulf energy crisis.

"Obviously, nobody wants to slow down production," Mr Gandhi said.

Orica made a net profit, excluding significant items, of \$283.1 million in the first half, up eight per cent on 2025's equivalent half.

Underlying pre-tax earnings came in at \$512 million, up five per cent for the six months ending March 31, on revenue of \$3.9 billion.

That represented its highest underlying result in more than 20 years.



However, Orica's bottom-line figure was a statutory loss of \$600,000, after it took a \$283.7 million hit in significant items linked to an explosion at US ammonium nitrate supplier CF Industries in November.

The incident, and subsequent outage, forced Orica to break its contracts with CF Industries, leading to a subsequent legal stoush and settlement costing Orica a cool \$US169.5 million (\$A234.1 million).

Supply shortfalls and related restructuring also weighed on the results.

So far, Orica had avoided supply issues affecting other companies due to the Middle East crisis.

"We are not directly experiencing any immediate material constraints related to the conflict in the Middle East, and our products are generally not transported to the Strait of Hormuz," Mr Gandhi said.

The Strait has been closed for weeks, as the US attempts to negotiate a peace deal with Iran, which was bombed by America in late February.

The crisis has negatively impacted multiple Australian-listed companies and driven up fuel prices, given that the shipping channel is a thoroughfare for about 20 per cent of the world's crude oil supplies.

Orica is also a significant consumer of gas, which it uses to make explosives.

Orica will pay shareholders an interim dividend of 28.5 cents per share, up 14 per cent from the same time last year.

The result beat market expectations, and investors responded in kind by sending its share price 6.6 per cent higher to 22.28.

"We view Orica's 1H26 result as positive as earnings per share was up 18 per cent on (the) previous calendar period and six per cent ahead of market," RBC Capital Markets analyst Mark Wilson said in a research note.

Orica's medium-term outlook remained unchanged, and its focus was on maximising shareholder value, its chief executive said.

"Orica is executing well and is well-positioned for the future," Mr Gandhi said. *Australian Associated Press*

Australian Mining

China's role in supply chains opens door for Australian lithium
Mikaela Henschel

AUSTRALIA's lithium sector is emerging as a key beneficiary of accelerating global efforts to diversify critical minerals supply chains away from China.

Speaking at the National Press Club this week, Lynas Rare Earths chief executive officer and managing director Amanda Lacaze said China's influence spans every stage of the supply chain, from extraction to processing and manufacturing.

"That creates a clear advantage for its economy and downstream industries," she said.

Lacaze said that position has been reinforced through policy settings designed to support domestic industry, including export controls, licensing regimes and pricing mechanisms that can shape how materials move through global markets.

"China has used a range of policy tools to prioritise its own manufacturing base," she said. China's role in supply chains is now accelerating the push for new suppliers, including established producers such as Australia. That shift is being felt across a range of critical minerals, including lithium, where demand continues to rise alongside the global transition to electrification and renewable energy.

As governments and manufacturers look to diversify supply, attention is increasingly turning to producers outside of China, with Australia emerging as a key alternative source given its resource base and established mining sector.

With abundant lithium resources, established mining expertise and a track record in developing large-scale operations, the country is emerging as a key supplier in a more diversified global market.

"Australia has the resources and capability to play a larger role in global supply chains," Lacaze said.

However, Lacaze said building a competitive supply chain requires more than resource availability, with processing capability, partnerships and long-term investment all playing a critical role.

"Processing is complex and requires sustained commitment to develop capability," she said.

Lacaze pointed to Lynas' own experience in rare earth as an example of how Australia can compete globally, particularly through strong international partnerships and continued investment in downstream capability.

"Working together, we have been able to create a resilient supply chain, even in the face of challenges," she said.

As global demand for lithium continues to accelerate, Lacaze said the focus is now on translating Australia's resource strength into long-term economic value.

"The opportunity is there, but it requires coordinated action across industry and government," she said.

For Australia, the opportunity is not just to supply lithium, but to play a larger role in a global supply chain that is increasingly looking beyond China. 🌐