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## **Gross Split Minerba Batal, Bahlil Buka Peluang Relaksasi Kuota Produksi**

Yohana Artha Uly, Erlangga Djumena -  
Tim Redaksi

**P**EMERINTAH memastikan tidak akan menerapkan skema gross split pada sektor mineral dan batu bara (minerba). Di sisi lain, dibuka peluang untuk relaksasi kuota produksi komoditas tambang.

Menteri Energi dan Sumber Daya Mineral (ESDM) Bahlil Lahadalia menegaskan, mekanisme gross split hanya berlaku untuk sektor minyak dan gas bumi (migas), tidak pada minerba.

Keputusan ini disebut sesuai dengan arahan Presiden Prabowo Subianto.

"Di ESDM atas dasar aturan dan arahan Bapak Presiden yang menganut perhitungan gross split hanya ada pada sektor migas, sementara di sektor minerba tidak ada perubahan sama sekali," ujar Bahlil dalam konferensi pers di Gedung DPR RI, Jakarta, Senin (8/6/2026).

Menurut dia, pemerintah tetap mempertahankan sistem yang berlaku saat ini di sektor minerba dan tidak akan mengadopsi pola bagi hasil seperti yang diterapkan di industri migas.

Bahlil mengatakan kepastian regulasi diperlukan untuk menjaga iklim investasi dan memberikan keyakinan kepada pelaku usaha pertambangan.

"Ini penting saya sampaikan untuk memberikan penegasan bahwa aturan yang sudah ada tidak ada perubahan untuk selamanya. Itu tugas saya untuk menjaga itu," kata dia.

## **Bahlil Opens Opportunity for Production Quota Relaxation After Mining Gross Split Cancelled**

Yohana Artha Uly, Erlangga Djumena –  
Editorial Team

**T**HE GOVERNMENT has confirmed that it will not implement a gross split scheme in the minerals and coal (minerba) sector. Meanwhile, it is opening up the possibility of relaxing production quotas for mining commodities.

Minister of Energy and Mineral Resources (ESDM) Bahlil Lahadalia emphasized that the gross split mechanism only applies to the oil and gas (migas) sector, not to the mineral and coal sector.

This decision is said to be in accordance with President Prabowo Subianto's direction.

"In the ESDM, based on the President's regulations and directives, the gross split calculation is only applied to the oil and gas sector, while there are no changes at all in the mineral and coal sector," Bahlil said in a press conference at the Indonesian Parliament Building, Jakarta, Monday (June 8, 2026).

According to him, the government will maintain the current system in the mineral and coal sector and will not adopt a profit-sharing system like that applied in the oil and gas industry.

Bahlil said regulatory certainty is necessary to maintain the investment climate and provide confidence to mining business actors.

"It's important for me to convey this to emphasize that the existing regulations will remain unchanged forever. It's my job to uphold that," he said.

Pernyataan tersebut sekaligus mengakhiri spekulasi terkait kemungkinan penerapan skema gross split di sektor minerba.

Sebelumnya, pada 5 Mei 2026 usai bertemu Prabowo di Istana Negara, Bahlil sempat mengungkapkan bahwa pemerintah sedang mengkaji berbagai pola kerja sama pengelolaan sumber daya alam untuk mengoptimalkan kontribusi terhadap pendapatan negara.

Salah satu yang dipertimbangkan saat itu adalah kemungkinan mengadopsi model bagi hasil yang digunakan di sektor migas selama ini.

### **Kuota produksi bisa ditambah saat harga tinggi**

Selain memastikan tidak ada perubahan skema pengelolaan minerba, Bahlil mengungkapkan pemerintah akan lebih fleksibel dalam mengatur kuota produksi komoditas tambang.

Ia mengatakan, produksi minerba berpotensi ditingkatkan ketika harga komoditas global sedang berada pada level yang menguntungkan.

"Kita selalu mengikuti perkembangan dengan kita akan melakukan relaksasi yang terukur. Artinya kalau harganya bagus kita akan meningkatkan produksi," ujar Bahlil pada kesempatan yang sama.

Menurut dia, peningkatan produksi saat harga tinggi akan memberikan manfaat bagi seluruh pihak, mulai dari perusahaan tambang, pemerintah, hingga masyarakat.

"Maka idealnya pemerintah atau pengusaha atau rakyat pun berkepentingan, untuk harga bagus produksi kita juga harus banyak. Supaya pengusahanya untung, negara untung, rakyatnya juga bisa mendapat dampak positif," kata dia.

This statement also ends speculation regarding the possibility of implementing a gross split scheme in the mineral and coal sector.

Previously, on May 5, 2026, after meeting Prabowo at the State Palace, Bahlil revealed that the government was reviewing various cooperation patterns for natural resource management to optimize contributions to state revenue.

One thing that was considered at that time was the possibility of adopting the profit-sharing model currently used in the oil and gas sector.

### **Production quotas can be increased when prices are high**

In addition to ensuring there will be no changes to the mineral and coal management scheme, Bahlil revealed that the government will be more flexible in setting production quotas for mining commodities.

He said that mineral and coal production has the potential to be increased when global commodity prices are at a favorable level.

"We're always monitoring developments and will implement measured relaxations. This means that if prices are good, we'll increase production," Bahlil said on the same occasion.

According to him, increasing production when prices are high will benefit all parties, from mining companies, the government, to the community.

"So, ideally, the government, businesses, and even the people have an interest. To achieve good prices, we need to produce more. This will benefit businesses, the country, and the people, too, will benefit positively," he said.

Meski demikian, relaksasi tersebut tidak dilakukan tanpa batas.

Pemerintah tetap akan mengendalikan volume produksi dengan mempertimbangkan keseimbangan pasokan dan permintaan di pasar.

"Kalau harganya mulai mentok kita juga akan membuat kebijakan agar supply and demand itu bisa kita jaga," ujar Bahlil.

### **Pelaku usaha bisa ajukan revisi RKAB**

Sebelumnya, Direktur Jenderal Mineral dan Batu Bara Kementerian ESDM Tri Winarno mengatakan pemerintah akan terus mengevaluasi kebijakan Rencana Kerja dan Anggaran Biaya (RKAB) 2026.

Evaluasi tersebut mencakup kemungkinan revisi kuota produksi yang dapat diajukan perusahaan tambang pada periode 1-31 Juli 2026.

"Kalau mengajukan, ya Juli, paling lambat tanggal 31 Juli. Tetapi tentang berapa dan lain sebagainya, ya tergantung lah itu nanti," kata Tri.

Pernyataan itu muncul di tengah keluhan pelaku usaha terkait pemangkasan kuota produksi sejumlah komoditas tambang, terutama batu bara dan nikel.

Ketua Dewan Penasihat Perhimpunan Ahli Pertambangan Indonesia (Perhapi) Rizal Kasli menilai pengurangan kuota produksi telah berdampak pada efisiensi operasional perusahaan dan berpotensi memicu pemutusan hubungan kerja (PHK). Pada 2026, pemerintah menargetkan produksi batu bara sekitar 600 juta ton, turun sekitar 250 juta ton dibandingkan kuota tahun sebelumnya.

Sementara produksi nikel dibatasi pada kisaran 190-200 juta ton, lebih rendah dibanding kebutuhan bahan baku smelter yang diperkirakan mencapai 340-350 juta ton.

However, this relaxation is not carried out without limits.

The government will continue to control production volumes by considering the balance of supply and demand in the market.

"If prices start to plateau, we will also implement policies to maintain supply and demand," Bahlil said.

### **Business actors can submit revisions to the RKAB**

Previously, the Director General of Minerals and Coal at the Ministry of Energy and Mineral Resources, Tri Winarno, said the government would continue to evaluate the 2026 Work Plan and Budget (RKAB) policy.

The evaluation includes possible revisions to production quotas that mining companies may submit for the period 1-31 July 2026.

"If you apply, yes, July, no later than July 31st. But regarding how much and so on, well, that depends," said Tri.

The statement came amid complaints from business actors regarding cuts in production quotas for a number of mining commodities, particularly coal and nickel.

Rizal Kasli, Chairman of the Advisory Board of the Indonesian Mining Experts Association (Perhapi), assessed that the reduction in production quotas has impacted companies' operational efficiency and has the potential to trigger layoffs. By 2026, the government is targeting coal production of around 600 million tons, a decrease of around 250 million tons compared to the previous year's quota.

Meanwhile, nickel production is limited to around 190-200 million tons, lower than the smelter's raw material needs, which are estimated to reach 340-350 million tons.

Menurut Rizal, setiap pengurangan produksi sebesar 1 juta ton berpotensi memengaruhi sekitar 500 tenaga kerja.

"Kalau pengurangan produksi sebesar 250 juta ton berarti kira-kira 125.000 tenaga kerja akan terdampak," ujarnya. ➡

According to Rizal, every 1 million ton reduction in production has the potential to affect around 500 workers.

"If production is reduced by 250 million tons, approximately 125,000 workers will be affected," he said. ➡

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## **Skema Gross Split Minerba Batal, Industri Masih Soroti Ketidakpastian Regulasi**

Yohana Artha Uly, Teuku Muhammad Valdy Arief - Tim Redaksi

**I**NDONESIAN Mining Association (API-IMA) menilai pembatalan rencana penerapan skema bagi hasil gross split di sektor mineral dan batu bara atau minerba perlu diikuti kepastian kebijakan.

Direktur Eksekutif API-IMA Sari Esayanti mengatakan, rencana penerapan skema tersebut sempat menimbulkan kekhawatiran di kalangan pelaku industri.

Menurut Sari, gross split yang selama ini digunakan di sektor minyak dan gas bumi atau migas tidak dapat begitu saja diterapkan pada sektor minerba.

Ia menilai karakter usaha pertambangan berbeda dengan migas, baik dari sisi komoditas, struktur biaya, risiko operasi, maupun skema kewajiban kepada negara.

"Pertambangan minerba memiliki karakteristik yang unik dengan tingkat kompleksitas yang berbeda pada masing-masing komoditas. Perbedaan mendasar inilah yang membuat banyak negara menerapkan sistem royalti dan fiskal yang berbeda dengan sektor migas," ujar Sari dalam keterangannya, Selasa (9/6/2026).

## **The Gross Split Mining Scheme Has Been Cancelled, and Industry Still Highlights Regulatory Uncertainty**

Yohana Artha Uly, Teuku Muhammad Valdy Arief – Editorial Team

**T**HE INDONESIAN Mining Association (API-IMA) believes that the cancellation of the planned implementation of the gross split profit-sharing scheme in the mineral and coal sector needs to be followed by policy certainty.

API-IMA Executive Director Sari Esayanti said the plan to implement the scheme had raised concerns among industry players.

According to Sari, the gross split that has been used in the oil and gas sector cannot simply be applied to the mineral and coal sector.

He assessed that the character of the mining business is different from oil and gas, both in terms of commodities, cost structure, operational risks, and the scheme of obligations to the state.

"Minerba mining has unique characteristics, with varying levels of complexity for each commodity. This fundamental difference is why many countries implement different royalty and fiscal systems than the oil and gas sector," Sari said in a statement on Tuesday (June 9, 2026).

Sari mengatakan, pembatalan rencana gross split menjadi langkah penting untuk meredakan ketidakpastian di sektor pertambangan.

Namun, ia menilai pemerintah tetap perlu menjaga konsistensi kebijakan fiskal dan kewajiban keuangan perusahaan.


Kepastian tersebut dibutuhkan karena industri minerba tengah menghadapi sejumlah perubahan kebijakan dalam waktu berdekatan.

Beberapa kebijakan yang menjadi perhatian pelaku usaha antara lain ekspor satu pintu, devisa hasil ekspor (DHE), penyesuaian royalti, Harga Patokan Mineral (HPM), bea keluar, hingga kewajiban penerapan biodiesel B50.

Menurut Sari, banyaknya penyesuaian kebijakan dapat memengaruhi perhitungan investasi dan operasional perusahaan tambang.

Karena itu, pelaku industri meminta pemerintah menjaga stabilitas aturan agar rencana investasi jangka panjang tidak terganggu.

API-IMA menilai kepastian dan konsistensi kebijakan menjadi faktor penting dalam menjaga daya saing industri pertambangan Indonesia.

"Hal ini sangat penting terutama di tengah meningkatnya kebutuhan investasi jangka panjang untuk mendukung agenda hilirisasi dan transisi energi nasional," pungkas Sari. 

Sari said that the cancellation of the gross split plan was an important step to reduce uncertainty in the mining sector.

However, he believes the government still needs to maintain consistency in fiscal policy and corporate financial obligations.


This certainty is needed because the mineral and coal industry is facing a number of policy changes in the near future.

Several policies that have attracted the attention of business actors include one-stop exports, export proceeds (DHE), royalty adjustments, Mineral Benchmark Prices (HPM), export duties, and the mandatory implementation of B50 biodiesel.

According to Sari, the large number of policy adjustments can affect investment calculations and mining company operations.

Therefore, industry players are asking the government to maintain regulatory stability so that long-term investment plans are not disrupted.

API-IMA assesses that policy certainty and consistency are important factors in maintaining the competitiveness of the Indonesian mining industry.

"This is crucial, especially amidst the growing need for long-term investment to support the national downstreaming and energy transition agenda," Sari concluded. 

**Bisnis.com**

## **Sederet Kepastian Kebijakan Minerba jadi Angin Segar Bagi Pengusaha Tambang**

Penulis : M Ryan Hidayatullah

**P**EMBATALAN wacana skema bagi hasil tambang ala minyak dan gas (migas) hingga rencana relaksasi kebijakan pengetatan kuota produksi batu bara dan nikel memberikan angin segar bagi pengusaha tambang. Keputusan Kementerian Energi dan Sumber Daya Mineral (ESDM) ini dinilai memberikan stabilitas dan kepastian investasi di sektor pertambangan.

Indonesian Mining Association (IMA) mengapresiasi langkah pemerintah yang membatalkan penerapan skema bagi hasil pada sektor pertambangan. Direktur Eksekutif IMA Sari Esayanti mengatakan, keputusan tersebut sangat penting untuk menghilangkan ketidakpastian yang berpotensi mengganggu investasi.

Menurutnya, industri pertambangan minerba memiliki karakteristik yang berbeda secara mendasar dengan migas sehingga membutuhkan pendekatan fiskal tersendiri.

"Industri pertambangan minerba memiliki karakteristik yang unik dengan tingkat kompleksitas yang berbeda pada masing-masing komoditas. Perbedaan mendasar inilah yang membuat banyak negara menerapkan sistem royalti dan fiskal yang berbeda dengan sektor migas," ujar Sari kepada Bisnis, Senin (8/6/2026).

IMA berharap pembatalan rencana tersebut menjadi langkah awal menuju stabilitas kebijakan fiskal dan kewajiban keuangan perusahaan.

## **A Series of Certain Mineral and Coal Policy Confirmations Offer a Breath of Fresh Air for Mining Entrepreneurs**

Author: M Ryan Hidayatullah

**T**HE CANCELLATION of the proposed profit-sharing scheme for oil and gas mining, along with the planned relaxation of coal and nickel production quotas, has provided a breath of fresh air for mining companies. These decisions by the Ministry of Energy and Mineral Resources (ESDM) are seen as providing stability and investment certainty in the mining sector.

The Indonesian Mining Association (IMA) commends the government's decision to cancel the profit-sharing scheme in the mining sector. IMA Executive Director Sari Esayanti said the decision was crucial in eliminating uncertainty that could potentially disrupt investment.

According to him, the mineral and coal mining industry has fundamentally different characteristics from the oil and gas sector, thus requiring a separate fiscal approach.

"The mineral and coal mining industry has unique characteristics, with varying levels of complexity for each commodity. This fundamental difference is why many countries implement different royalty and fiscal systems than the oil and gas sector," Sari told Bisnis on Monday (June 8, 2026).

IMA hopes that the cancellation of the plan will be the first step towards stabilizing the company's fiscal policy and financial obligations.

Menurut Sari, kebutuhan akan kepastian regulasi semakin penting karena industri saat ini sedang menghadapi berbagai penyesuaian kebijakan baru, mulai dari ekspor satu pintu, kewajiban devisa hasil ekspor (DHE), penyesuaian tarif royalti dan harga patokan mineral (HPM), bea keluar, hingga implementasi biodiesel B50.

Dia menegaskan bahwa konsistensi kebijakan menjadi faktor utama dalam menjaga daya saing industri pertambangan nasional, terutama ketika kebutuhan investasi untuk hilirisasi dan transisi energi terus meningkat.

Selain itu, IMA juga menyambut baik rencana relaksasi produksi batu bara. Sari berpendapat, kebijakan tersebut relevan dengan kondisi yang dihadapi industri saat ini.

Dia mengatakan, penguatan dolar AS memang meningkatkan nilai pendapatan ekspor, tetapi pada saat yang sama juga mendorong kenaikan biaya operasional karena banyak komponen tambang masih bergantung pada barang impor. Oleh karena itu, relaksasi produksi dinilai dapat memberikan ruang bagi perusahaan untuk mengompensasi kenaikan biaya tersebut.

"Tekanan biaya operasional yang tinggi dan penurunan kuota produksi telah membuat beberapa tambang terpaksa menghentikan produksinya. Kebijakan relaksasi dari Kementerian ESDM ini menjadi angin segar yang dapat menjamin keberlanjutan operasi pertambangan dan sangat penting untuk mencegah potensi pemutusan hubungan kerja [PHK]," kata Sari.

IMA juga menilai kombinasi antara harga komoditas yang tinggi, penguatan dolar AS, dan relaksasi produksi berpotensi meningkatkan penerimaan negara secara signifikan. Oleh sebab itu,...

According to Sari, the need for regulatory certainty is increasingly important because the industry is currently facing various new policy adjustments, ranging from single-door exports, export proceeds (DHE) obligations, adjustments to royalty rates and mineral benchmark prices (HPM), export duties, and the implementation of B50 biodiesel.

He emphasized that policy consistency is a key factor in maintaining the competitiveness of the national mining industry, especially as investment needs for downstreaming and energy transition continue to increase.

Furthermore, the IMA welcomed the planned relaxation of coal production. Sari believes the policy is relevant to the current conditions facing the industry.

He stated that while a strengthening US dollar does increase export revenues, it also increases operational costs, as many mining components still rely on imports. Therefore, production relaxation is considered to provide companies with the opportunity to offset these cost increases.

"High operational cost pressures and declining production quotas have forced several mines to halt production. This relaxation policy from the Ministry of Energy and Mineral Resources is a breath of fresh air that can ensure the sustainability of mining operations and is crucial for preventing potential layoffs," said Sari.

The IMA also believes the combination of high commodity prices, a strengthening US dollar, and production relaxation has the potential to significantly increase state revenue. Therefore,...

Oleh sebab itu, IMA mendukung pemerintahan untuk menjalankan kebijakan tersebut secara terukur demi kepentingan nasional.

Adapun, Kementerian ESDM mulai melunakkan sejumlah aturan di sektor pertambangan mineral dan batu bara (minerba). Langkah itu menjadi sinyal bahwa pemerintah responsif terhadap dinamika pasar dan kondisi bisnis saat ini yang belakangan tertekan oleh faktor eksternal.

Menteri Energi dan Sumber Daya Mineral (ESDM) Bahlil Lahadalia mengumumkan sejumlah kebijakan. Pertama, dia menegaskan tidak akan ada skema bagi hasil antara pemerintah dan pihak pengelola tambang.

Pernyataan itu sekaligus membatalkan rencana penerapan model pembagian hasil yang diwacanakan akan mengacu pada praktik atau skema di sektor migas, yakni cost recovery maupun gross split.

Bahlil menuturkan, kebijakan gross split hanya berlaku di sektor hulu migas. Karena itu, dia menegaskan sektor pertambangan tidak akan menerapkan skema tersebut.

"Sementara di sektor minerba tidak ada perubahan sama sekali sehingga ini penting saya sampaikan untuk memberikan penegasan bahwa aturan yang sudah ada tidak ada perubahan untuk selamanya. Itu tugas saya untuk menjaga itu," tutur Bahlil dalam konferensi pers di Jakarta, Senin (8/5/2026).

Kedua, pemerintah bakal melakukan relaksasi produksi batu bara. Semula, pemerintah berencana memangkas produksi batu bara ke level 600 juta ton pada tahun ini. Jumlah tersebut jauh di bawah realisasi produksi batu bara nasional pada 2025 yakni sebesar 790 juta ton dan sebesar 834 juta ton pada 2024.

Therefore, the IMA supports the government's measured implementation of these policies in the national interest.

Meanwhile, the Ministry of Energy and Mineral Resources (ESDM) has begun relaxing several regulations in the mineral and coal mining (minerba) sector. This move signals the government's responsiveness to market dynamics and current business conditions, which have recently been under pressure from external factors.

Energy and Mineral Resources (ESDM) Minister Bahlil Lahadalia announced several policies. First, he emphasized that there would be no profit-sharing scheme between the government and mining operators.

This statement also cancels the plan to implement a profit-sharing model that was planned to refer to practices or schemes in the oil and gas sector, namely cost recovery and gross split.

Bahlil explained that the gross split policy only applies to the upstream oil and gas sector. Therefore, he emphasized that the mining sector will not implement the scheme.

"Meanwhile, in the mineral and coal sector, there are no changes at all. So, it's important for me to convey this to emphasize that the existing regulations will remain unchanged forever. It's my job to uphold that," Bahlil said at a press conference in Jakarta on Monday (May 8, 2026).

Second, the government will relax coal production. Initially, the government planned to cut coal production to 600 million tons this year. This figure is far below the national coal production target of 790 million tons in 2025 and 834 million tons in 2024.

Bahlil menjelaskan, pemerintah masih memperhatikan perkembangan ketegangan geopolitik dan permintaan batu bara global. Menurutnya, secara ideal produksi batu bara Indonesia harus ditingkatkan jika harga sedang naik.

Dia menekankan bahwa langkah tersebut diambil demi keuntungan negara, pelaku usaha, dan masyarakat umum.

"Nah, atas dasar itu kita selalu mengikuti perkembangan dengan kita akan melakukan relaksasi yang terukur. Artinya, kalau harganya bagus kita akan meningkatkan produksi. Kalau harganya mulai mentok kita juga akan membuat kebijakan agar supply and demand itu bisa kita jaga," jelasnya.

Ketiga, pemerintah bakal menyesuaikan produksi bijih nikel dalam rencana kerja dan anggaran biaya (RKAB) 2026. Bahlil mengatakan, produksi nikel bakal disesuaikan dengan kebutuhan dari pabrik pemurnian atau smelter.

Bahlil mengatakan, produksi nikel bakal disesuaikan dengan kebutuhan smelter demi menjaga iklim investasi. Hal ini sekaligus dilakukan demi keberlanjutan program hilirisasi mineral.

"Maka kewajiban pemerintah khususnya dari kementerian ESDM adalah memastikan seluruh bahan baku yang bersumber dari negara kita harus ada. Artinya antara kapasitas produksi kebutuhan dengan RKAB yang akan kita berikan itu harus seimbang. Supaya apa industri bisa berjalan," jelasnya.

### **Mengembalikan Kepercayaan Investor**

Sejumlah kebijakan relaksasi tersebut muncul di tengah berbagai tantangan yang dihadapi industri sepanjang tahun ini, mulai dari gejolak geopolitik global, penguatan dolar Amerika Serikat (AS), kenaikan biaya operasional tambang, hingga ketidakpastian pasar komoditas menjadi tantangan yang dihadapi industri sepanjang tahun ini.

Bahlil explained that the government is still monitoring developments in geopolitical tensions and global coal demand. He believes that ideally, Indonesian coal production should increase if prices rise.

He emphasized that this step was taken for the benefit of the state, business actors, and the general public.

"Well, based on that, we're constantly monitoring developments and will implement measured relaxations. This means that if prices are good, we'll increase production. If prices start to plateau, we'll also implement policies to maintain supply and demand," he explained.

Third, the government will adjust nickel ore production in the 2026 work plan and budget (RKAB). Bahlil said nickel production will be adjusted to the needs of refining plants or smelters.

Bahlil stated that nickel production will be adjusted to smelter needs to maintain the investment climate. This is also done to ensure the sustainability of the mineral downstreaming program.

"Therefore, the government's responsibility, particularly the Ministry of Energy and Mineral Resources, is to ensure that all raw materials sourced from our country are available. This means that the required production capacity must be balanced with the RKAB (Regional Budget) we will provide. This is to ensure that the industry can operate," he explained.

### **Restoring Investor Confidence**

These relaxation policies emerged amidst various challenges faced by the industry throughout this year, ranging from global geopolitical turmoil, the strengthening of the United States (US) dollar, rising mining operational costs, to uncertainty in the commodity market.

Pada saat bersamaan, sektor pertambangan juga sedang menghadapi sederet kebijakan baru, mulai dari penerapan ekspor satu pintu, kewajiban devisa hasil ekspor (DHE), kenaikan royalti, penyesuaian harga patokan mineral (HPM), bea keluar, hingga kewajiban biodiesel B50.

Kombinasi berbagai kebijakan tersebut memunculkan kekhawatiran di kalangan investor mengenai meningkatnya biaya usaha dan berkurangnya daya saing Indonesia dibandingkan negara produsen mineral lainnya. Dalam konteks itulah langkah pemerintah kali ini dibaca sebagai upaya mengembalikan kepercayaan pelaku usaha.

Direktur Eksekutif Pusat Studi Hukum Energi dan Pertambangan (Pushep) Bisman Bhaktiar menilai pembatalan skema bagi hasil di sektor pertambangan memberikan kepastian dan kenyamanan berusaha bagi investor yang selama beberapa waktu terakhir dibayangi ketidakjelasan arah kebijakan fiskal sektor pertambangan.

Selain itu, relaksasi produksi batu bara juga dinilai sebagai sinyal positif karena menunjukkan pemerintah lebih responsif terhadap kondisi pasar.

"Ini sinyal positif karena menunjukkan pemerintah lebih responsif terhadap kondisi pasar," ujar Bisman kepada Bisnis.

Menurut Bisman, relaskaski produksi batu bara berpotensi membantu meningkatkan arus kas perusahaan dan memberikan fleksibilitas yang lebih besar bagi pelaku usaha untuk mengelola operasional di tengah ketidakpastian ekonomi global.

Meski demikian, dia menilai kebijakan tersebut belum cukup untuk meningkatkan daya saing investasi secara signifikan.

At the same time, the mining sector is also facing a series of new policies, ranging from the implementation of a single-door export system, the obligation to obtain export proceeds (DHE), increased royalties, adjustments to the mineral benchmark price (HPM), export duties, and the obligation to implement B50 biodiesel.

This combination of policies has raised investor concerns about rising business costs and Indonesia's reduced competitiveness compared to other mineral-producing countries. In this context, the government's current measures are seen as an effort to restore business confidence.

The Executive Director of the Center for Energy and Mining Law Studies (Pushep), Bisman Bhaktiar, assessed that the cancellation of the profit-sharing scheme in the mining sector provides certainty and comfort in doing business for investors who have recently been overshadowed by the unclear direction of fiscal policy in the mining sector.

Furthermore, the relaxation of coal production is also seen as a positive signal because it shows the government is more responsive to market conditions.

"This is a positive signal because it shows the government is more responsive to market conditions," Bisman told Bisnis.

According to Bisman, the relaxation of coal production has the potential to help improve companies' cash flow and provide greater flexibility for businesses to manage operations amid global economic uncertainty.

However, he assessed that this policy was not enough to significantly increase investment competitiveness.

"Kebijakan-kebijakan tersebut cukup membantu meningkatkan daya saing, tetapi belum cukup jika tidak dibarengi perbaikan iklim investasi secara menyeluruh," katanya.

Menurut Bisman, faktor yang paling menentukan kepercayaan investor tetaplah konsistensi regulasi dalam jangka panjang.

### **Stabilitas Regulasi Harus Dijaga**

Ketua Dewan Penasihat Perhimpunan Ahli Pertambangan Indonesia (Perhapi) Rizal Kasli mengapresiasi langkah pemerintah dengan melonggarkan sejumlah kebijakan di sektor pertambangan minerba.

Namun, dia mengingatkan pemerintah perlu menjaga stabilitas regulasi jangka panjang, memberikan insentif fiskal maupun nonfiskal, menyederhanakan birokrasi, serta menghadirkan kepastian investasi. Hal itu penting karena pertambangan merupakan industri padat modal dengan tingkat risiko tinggi dan periode pengembalian investasi yang panjang.

"Kalau beberapa faktor tersebut tidak terpenuhi, maka investor akan memilih negara lain yang lebih kompetitif. Indonesia bukan satu-satunya negara pemilik kekayaan sumber daya mineral utama di dunia," ucap Rizal.

Rizal menuturkan, keputusan pemerintah membatalkan skema bagi hasil di sektor pertambangan adalah langkah tepat. Dia berpendapat, wacana penerapan skema bagi hasil ala migas memang tidak kompatibel dengan karakteristik bisnis minerba.

Menurutnya, sektor pertambangan memiliki tingkat keragaman yang jauh lebih tinggi dibandingkan industri migas. Perbedaan tersebut terlihat dari jenis komoditas, kualitas cadangan, hingga skala usaha yang beroperasi.

"These policies are quite helpful in increasing competitiveness, but they won't be enough if they aren't accompanied by comprehensive improvements to the investment climate," he said.

According to Bisman, the most important factor in determining investor confidence remains long-term regulatory consistency.

### **Regulatory Stability Must Be Maintained**

Chairman of the Advisory Board of the Indonesian Mining Experts Association (Perhapi), Rizal Kasli, appreciated the government's move to relax a number of policies in the mineral and coal mining sector.

However, he reminded the government that it is necessary to maintain long-term regulatory stability, provide fiscal and non-fiscal incentives, simplify bureaucracy, and provide investment certainty. This is crucial because mining is a capital-intensive industry with high risks and long payback periods.

"If these factors aren't met, investors will choose other, more competitive countries. Indonesia isn't the only country with abundant mineral resources in the world," Rizal said.

Rizal stated that the government's decision to cancel the profit-sharing scheme in the mining sector was the right move. He argued that the proposed oil and gas-style profit-sharing scheme was incompatible with the nature of the mining and coal business.

According to him, the mining sector has a much higher level of diversity than the oil and gas industry. This difference is evident in the types of commodities, the quality of reserves, and the scale of operations.

Dia juga mendukung langkah pemerintah yang lebih fleksibel dalam menentukan kuota produksi batu bara. Menurut Rizal, penentuan kuota seharusnya memper-timbangkan perkembangan geopolitik global, kondisi ekonomi domestik, kebutuhan devisa, serta aspek ketahanan energi nasional.

"Pemerintah harus mempertimbangkan segala faktor terutama masalah per-ekonomian dalam negeri dan ketahanan energi nasional," imbuh Rizal. Editor : Denis Riantiza Meilanova

He also supports the government's more flexible approach to setting coal production quotas. According to Rizal, quota determination should take into account global geopolitical developments, domestic economic conditions, foreign exchange needs, and national energy security.

"The government must consider all factors, especially domestic economic issues and national energy security," Rizal added. Editor: Denis Riantiza Meilanova

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## **Pemerintah Beberkan Tahapan Ekspor Batubara dan Paduan Besi via PT DSI**

Reporter: Arif Ferdianto | Editor: Tri Sulistiowati

**K**EMENTERIAN Perdagangan (Kemendag) mensosialisasikan aturan baru mengenai tata kelola ekspor komoditas strategis untuk batu-bara hingga paduan besi (ferro aloy).

Keduanya masing-masing tertuang di dalam Permendag Nomor 15 Tahun 2026 tentang Kebijakan dan Pengaturan Ekspor Komoditas Sumber Daya Alam (SDA) Batubara, dan Permendag Nomor 17 Tahun 2026 tentang Kebijakan dan Pengaturan Ekspor Komoditas SDA Strategis Paduan Besi (Ferro Aloy).

Komoditas tersebut nantinya harus melakukan ekspor melalui BUMN Ekspor dalam hal ini PT Danantara Sumberdaya Indonesia (PT DSI). Ini diambil pemerintah guna memperkuat peran BUMN dan memperbaiki tata kelola niaga dalam negeri.

## **The Government Explains the Stages of Coal and Iron Alloy Exports via PT DSI**

Reporter: Arif Ferdianto | Editor: Tri Sulistiowati

**T**HE MINISTRY of Trade (Kemendag) is socializing new regulations regarding the management of exports of strategic commodities for coal and ferro alloys.

Both are stipulated in the Minister of Trade Regulation Number 15 of 2026 concerning the Policy and Regulation of the Export of Coal Natural Resource Commodities, and the Minister of Trade Regulation Number 17 of 2026 concerning the Policy and Regulation of the Export of Strategic Natural Resource Commodities of Iron Alloys (Ferro Alloys).

These commodities will then have to be exported through a state-owned export company, in this case PT Danantara Sumberdaya Indonesia (PT DSI). This government action aims to strengthen the role of state-owned enterprises and improve domestic trade governance.

Adapun pemerintah membagi implementasi kebijakan ini ke dalam dua tahap agar tidak mengganggu operasional para pelaku usaha ekspor yang ada saat ini.

Direktur Ekspor Produk Industri dan Pertambangan Kemendag, Muhammad Rivai Abbas menjabarkan bahwa tahap I yakni 1 Juni - 31 Desember 2026 merupakan masa transisi bagi pelaku usaha di mana harus melaporkan kegiatan eksportnya melalui PT DSI.

Masa transisi ini akan dimanfaatkan oleh pemerintah untuk meninjau efektivitas sistem baru ini secara berkala dalam kurun waktu tiga bulan berjalan.

"Di mana di dalam masa itu dalam tiga bulan akan dilakukan evaluasi terhadap pelaksanaan atau implementasi tata kelola ekspor yang ada," ujarnya dalam sosialisasi secara daring, Selasa (9/6/2026).

Selanjutnya di tahap II yakni 1 Januari 2027 pelaku usaha barulah melakukan ekspor melalui PT DSI. Melalui skema teranyar ini, seluruh proses pengapalan komoditas dari hulu ke hilir akan dikelola secara penuh oleh satu pintu BUMN Ekspor.

"Seluruh proses dari pre-clearance sampai dengan post-clearance itu seluruhnya dilakukan oleh BUMN ekspor dalam hal ini adalah PT DSI," jelas Rivai.

Ketentuan baru ini otomatis mengubah regulasi lama karena kini terdapat kewajiban integrasi data sistem pelaporan otomatis dengan pihak Bea Cukai.

"Kalau mekanisme lama Permendag 23 tahun 2023 ekspor komoditas SDA strategis dilakukan oleh pelaku usaha dokumennya Ekspor Terdaftar (ET) dan Laporan Surveyor (LS). Nah di mekanisme baru periode 1 Juni sampai 2026 masih sama tapi dilakukan oleh pelaku usaha dengan kewajiban pelaporan kepada BUMN ekspor dan dokumennya tetap ET dan LS," tambahnya.

The government has divided the implementation of this policy into two stages so as not to disrupt the operations of existing export businesses.

The Director of Industrial and Mining Product Exports at the Ministry of Trade, Muhammad Rivai Abbas, explained that phase I, namely June 1 – December 31, 2026, is a transition period for business actors where they must report their export activities through PT DSI.

The government will use this transition period to periodically review the effectiveness of the new system over the next three months.

"During that three-month period, an evaluation will be conducted on the implementation of existing export governance," he said during an online outreach event on Tuesday (June 9, 2026).

In the second phase, starting January 1, 2027, businesses will be able to export through PT DSI. Under this new scheme, the entire commodity shipping process, from upstream to downstream, will be fully managed by a single state-owned export company.

"The entire process, from pre-clearance to post-clearance, is carried out by the exporting state-owned company, in this case PT DSI," explained Rivai.

This new provision automatically changes the old regulation because there is now a requirement to integrate automatic reporting system data with Customs.

"Under the previous mechanism, under Minister of Trade Regulation 23 of 2023, exports of strategic natural resource commodities were handled by business actors, with the documents being Registered Exports (ET) and Surveyor Reports (LS). Under the new mechanism, from June 1 to 2026, the same applies, but business actors are required to report to the exporting state-owned enterprise (SOE), and the documents remain ET and LS," he added.

Rivai menyebutkan, di dalam Permendag 15 Tahun 2026 terdapat pokok pengaturan terkait barang yang dikecualikan, seperti barang keperluan penelitian dan pengembangan, barang contoh, barang untuk keperluan pameran dan barang reekspor karena tidak sesuai spesifikasi dan atau tidak habis terpakai.

Lebih lanjut, Rivai menambahkan, aturan ketat ini juga berlaku penuh untuk komoditas paduan besi yang mencakup belasan pos tarif dengan skema larangan dan pembatasan (lartas) serupa.

"Cakupan komoditas paduan besinya itu mencakup 12 post tarif 8 digit turunan HS7202 yang dilarang dan diatur dengan LS serta 3 post tarif 8 digit turunan HS7202 yang diatur tanpa LS jadi total kurang lebih ada 15 post tarif," tandasnya.

Rivai stated that Trade Minister Regulation No. 15 of 2026 contains key provisions regarding exempted goods, such as goods for research and development purposes, samples, goods for exhibition purposes, and re-exported goods due to non-conformity to specifications and/or non-consumable items.

Furthermore, Rivai added, these strict regulations also apply fully to iron alloy commodities, which cover dozens of tariff lines with similar prohibition and restriction (lartas) schemes.

"The scope of the iron alloy commodity includes 12 8-digit tariff lines derived from HS7202 that are prohibited and regulated by LS, as well as 3 8-digit tariff lines derived from HS7202 that are regulated without LS, so there are approximately 15 tariff lines in total," he concluded.

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## **Asosiasi Pertambangan Dukung Relaksasi Produksi Batubara, Dongkrak Penerimaan Negara**

Reporter: Arif Ferdianto | Editor: Tri Sulistiowati

**A** SOSIASI Pertambangan Indonesia atau Indonesian Mining Association (API-IMA) menyambut positif rencana Menteri Energi dan Sumber Daya Mineral (ESDM) Bahlil Lahadalia yang tengah menyiapkan kebijakan relaksasi kuota produksi batubara.

Langkah ini dinilai strategis untuk menjaga keberlanjutan operasi di tengah tekanan beban biaya operasional yang terus membengkak demi memaksimalkan penerimaan negara.

Direktur Eksekutif API-IMA, Sari Esayanti menegaskan bahwa kebijakan relaksasi yang terukur ini sangat krusial untuk memastikan sektor pertambangan tetap tangguh ke depan.

## **Mining Association Supports Coal Production Relaxation to Boost State Revenue**

Reporter: Arif Ferdianto | Editor: Tri Sulistiowati

**T**HE INDONESIAN Mining Association (API-IMA) has welcomed the plan by the Minister of Energy and Mineral Resources (ESDM), Bahlil Lahadalia, to prepare a policy to relax coal production quotas.

This step is considered strategic to maintain operational sustainability amidst the pressure of ever-increasing operational costs in order to maximize state revenue.

API-IMA Executive Director Sari Esayanti emphasized that this measured relaxation policy is crucial to ensuring the mining sector remains resilient going forward.

Menurutnya, industri saat ini membutuhkan dorongan besar agar tetap mampu memberikan kontribusi maksimal terhadap perekonomian nasional di tengah ketidakpastian global yang masih membayangi pasar komoditas.

"Kebijakan relaksasi produksi ini menjadi semakin relevan bagi pelaku usaha di tengah tren penguatan kurs dolar AS saat ini. Di satu sisi, kenaikan dolar memang menguntungkan karena transaksi ekspor batu bara menggunakan mata uang dolar, sehingga pendapatan yang di-konversi ke Rupiah akan meningkat. Namun, di sisi lain, pelaku usaha juga tengah menghadapi beban pembengkakan biaya operasional (operational cost)," ujarnya melalui keterangan resmi, Senin (9/6/2026).

Sari menambahkan, komponen utama operasional tambang seperti bahan bakar, alat berat, dan suku cadang sangat bergantung pada impor yang harganya terkerek naik akibat kuatnya dolar.

Ia berpandangan, melihat situasi di lapangan, tekanan biaya operasional yang tinggi dan penurunan kuota produksi telah membuat beberapa tambang terpaksa menghentikan produksinya sehingga relaksasi kuota ini menjadi ruang kompensasi.

"Kebijakan relaksasi dari Kementerian ESDM ini menjadi angin segar yang dapat menjamin keberlanjutan operasi pertambangan dan sangat penting untuk mencegah potensi Pemutusan Hubungan Kerja (PHK)," katanya.

Di samping menyelamatkan kelangsungan industri dan tenaga kerja, Sari meyakini momentum tingginya harga komoditas yang dipadukan dengan penguatan dolar AS ini akan berdampak sangat signifikan terhadap proyeksi penerimaan negara.

According to him, the industry currently requires significant support to continue to make maximum contributions to the national economy amidst the global uncertainty that still looms over the commodity market.

"This production relaxation policy is becoming increasingly relevant for businesses amidst the current strengthening US dollar exchange rate. On the one hand, a rising dollar is beneficial because coal export transactions are denominated in dollars, thus increasing revenue converted to Rupiah. However, on the other hand, businesses are also facing the burden of rising operational costs," he said in an official statement on Monday (June 9, 2026).

Sari added that key components of mining operations, such as fuel, heavy equipment, and spare parts, are highly dependent on imports, the prices of which have been driven up by the strong dollar.

He believes that, given the situation on the ground, the pressure of high operational costs and reduced production quotas have forced several mines to halt production, making this quota relaxation a space for compensation.

"This relaxation policy from the Ministry of Energy and Mineral Resources is a breath of fresh air that can ensure the sustainability of mining operations and is crucial for preventing potential layoffs," he said.

Besides safeguarding the sustainability of industry and the workforce, Sari believes that the momentum of high commodity prices combined with the strengthening of the US dollar will have a significant impact on projected state revenues.

Sebelumnya, Pemerintah membuka peluang untuk melakukan penyesuaian kuota produksi batubara dalam Rencana Kerja dan Anggaran Biaya (RKAB). Relaksasi ini demi memanfaatkan momentum harga komoditas global yang tengah berada dalam tren positif akibat dinamika geopolitik belakangan ini.

Menteri ESDM, Bahlil Lahadalia menjelaskan, pemerintah terus mencermati perkembangan pasar internasional sebelum menyetujui kebijakan tersebut.

"Terkait dengan RKAB yang lain, komoditas yang lain termasuk batubara, kita memperhatikan betul kecenderungan daripada geopolitik ketegangan di Timur Tengah dengan situasi harga global," ujarnya di Kompleks Parlemen, Jakarta, Senin (8/6/2026).

Bahlil mengungkapkan, momentum penguatan harga komoditas ini perlu merespon positif oleh seluruh pemangku kepentingan di dalam negeri. Menurutnya, optimalisasi volume produksi dinilai bagus agar potensi keuntungan ekonomi yang tercipta bisa dirasakan secara merata oleh pelaku usaha, negara, maupun masyarakat luas.

"Maka idealnya pemerintah atau pengusaha atau rakyat pun berkepentingan untuk harga bagus, produksi kita juga harus banyak. Supaya apa? pengusahanya untung, negara untung, rakyat juga bisa mendapat dampak positif," kata Bahlil.

Atas dasar tersebut, Bahlil memastikan evaluasi terhadap kuota produksi pertambangan akan dilakukan secara dinamis dan berkala. 🔄

Previously, the government opened the opportunity to adjust coal production quotas in the Work Plan and Budget (RKAB). This relaxation aims to capitalize on the positive momentum of global commodity prices due to recent geopolitical dynamics.

Energy and Mineral Resources Minister Bahlil Lahadalia explained that the government continues to monitor international market developments before implementing this policy.

"Regarding other RKAB (Regional Budget) and other commodities, including coal, we are closely monitoring the geopolitical trends, tensions in the Middle East, and the global price situation," he said at the Parliament Complex in Jakarta on Monday (June 8, 2026).

Bahlil stated that all domestic stakeholders need to respond positively to this momentum of strengthening commodity prices. He believes optimizing production volume is essential so that the potential economic benefits generated can be felt equally by businesses, the government, and the wider community.

"So, ideally, the government, businesses, and even the people have an interest in good prices, and our production should also be high. So, what? Businesses profit, the country profits, and the people can also benefit positively," Bahlil said.

Based on this, Bahlil ensured that evaluations of mining production quotas would be carried out dynamically and periodically. 🔄

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## **Relaksasi RKAB Batubara Bisa Picu Aktivitas Tambang, KOBX Siap Tangkap Peluang**

Reporter: Diki Mardiansyah | Editor:  
Ignatia Maria Sri Sayekti

**R**ENCANA pemerintah merelaksasi target produksi batubara dalam Rencana Kerja dan Anggaran Biaya (RKAB) 2026 berpotensi menjadi sentimen positif bagi industri alat berat. Kebijakan tersebut dinilai dapat mendorong peningkatan aktivitas tambang dan berujung pada kenaikan kebutuhan alat berat.

Corporate Secretary PT Kobexindo Tractors Tbk (KOBX), Gabrielle Azelia mengatakan, perseroan mendukung kebijakan pemerintah yang bertujuan menggerakkan aktivitas bisnis, termasuk di sektor pertambangan.

"Sebagai pelaku industri distributor alat berat, tentu kami mendukung setiap kebijakan pemerintah, terlebih jika bertujuan untuk mengairahkan iklim bisnis. Kami berharap kebijakan tersebut dapat memacu produksi tambang, terutama pertambangan batubara, sehingga berdampak pada peningkatan penjualan alat berat," ujar Gabrielle kepada Kontan, Selasa (9/6/2026).

Menurut dia, tanda-tanda pemulihan permintaan alat berat sudah mulai terlihat sejak awal tahun ini. KOBX mencatat penjualan alat berat tumbuh 28% pada kuartal I-2026 dibandingkan periode yang sama tahun sebelumnya.

Gabrielle berharap tren perbaikan tersebut dapat terus berlanjut seiring membaiknya aktivitas pertambangan.

Meski demikian, ia mengingatkan sejumlah faktor eksternal masih akan memengaruhi kinerja industri alat berat. Mulai dari stabilitas kawasan,...

## **Relaxation of the Coal RKAB Could Stimulate Mining Activity, KOBX Ready to Seize the Opportunity**

Reporter: Diki Mardiansyah | Editor:  
Ignatia Maria Sri Sayekti

**T**HE GOVERNMENT's plan to relax the coal production target in the 2026 Work Plan and Budget (RKAB) has the potential to be a positive factor for the heavy equipment industry. This policy is expected to stimulate increased mining activity and ultimately increase the demand for heavy equipment.

Corporate Secretary of PT Kobexindo Tractors Tbk (KOBX), Gabrielle Azelia, said that the company supports government policies aimed at stimulating business activities, including in the mining sector.

"As a heavy equipment distributor, we certainly support every government policy, especially if it aims to stimulate the business climate. We hope this policy will stimulate mining production, particularly coal mining, thereby increasing heavy equipment sales," Gabrielle told Kontan on Tuesday (June 9, 2026).

According to him, signs of a recovery in demand for heavy equipment have been visible since the beginning of this year. KOBX recorded a 28% growth in heavy equipment sales in the first quarter of 2026 compared to the same period the previous year.

Gabrielle hopes that this improving trend will continue as mining activities improve.

However, he cautioned that a number of external factors would still impact the performance of the heavy equipment industry, including regional stability,...

Mulai dari stabilitas kawasan, pergerakan nilai tukar rupiah, harga bahan bakar, hingga harga batubara global.


"Faktor-faktor tersebut sangat berperan terhadap permintaan alat berat, terlebih di tengah persaingan dengan merek-merek alat berat baru asal Tiongkok," katanya.

Untuk menjaga daya saing, Kobexindo telah menambah lini produk alat berat asal Tiongkok. Langkah ini dilakukan guna memberikan pilihan yang lebih beragam kepada pelanggan dari sisi tipe, spesifikasi maupun harga.

Sebelumnya, Menteri Energi dan Sumber Daya Mineral (ESDM) Bahlil Lahadalia mengungkapkan pemerintah akan melakukan relaksasi RKAB batubara secara terukur dengan mempertimbangkan perkembangan harga komoditas global.

"Kita selalu mengikuti perkembangan dengan kita akan melakukan relaksasi (RKAB) yang terukur. Artinya kalau harganya bagus kita akan meningkatkan produksi," ujar Bahlil dalam konferensi pers di Gedung DPR, Senayan, Jakarta, Senin (8/6/2026).

Sebagai catatan, Kementerian ESDM sebelumnya merencanakan produksi batubara melalui RKAB 2026 sekitar 600 juta ton. Angka tersebut lebih rendah dibanding RKAB batubara 2025 yang mencapai 1,2 miliar ton. Adapun realisasi produksi batubara nasional pada 2025 tercatat sekitar 790 juta ton.

Rencana relaksasi RKAB dinilai dapat menjadi angin segar bagi pelaku industri alat berat. Pasalnya, peningkatan target produksi tambang biasanya diikuti kebutuhan alat berat yang lebih tinggi, baik untuk pembukaan lahan, penguasaan lapisan tanah penutup (overburden), maupun kegiatan produksi batubara. 

including regional stability, rupiah exchange rate fluctuations, fuel prices, and global coal prices.


"These factors play a significant role in the demand for heavy equipment, especially amidst competition from new heavy equipment brands from China," he said.

To maintain its competitiveness, Kobexindo has expanded its product line to include Chinese-made heavy equipment. This move aims to provide customers with a wider choice of types, specifications, and prices.

Previously, Minister of Energy and Mineral Resources (ESDM) Bahlil Lahadalia stated that the government would implement measured relaxation of the coal RKAB, taking into account developments in global commodity prices.

"We are closely monitoring developments and will implement measured relaxations (of the Budget and Budget Plan). This means that if prices are good, we will increase production," Bahlil said in a press conference at the House of Representatives Building in Senayan, Jakarta, on Monday (June 8, 2026).

For the record, the Ministry of Energy and Mineral Resources previously planned coal production of around 600 million tons through the 2026 Work Plan and Budget (RKAB). This figure is lower than the 2025 coal RKAB, which reached 1.2 billion tons. Actual national coal production in 2025 was recorded at around 790 million tons.

The planned relaxation of the RKAB (Regional Budget) is considered a breath of fresh air for the heavy equipment industry. Increased mining production targets are typically accompanied by a higher demand for heavy equipment, both for land clearing, overburden removal, and coal production. 



## **Eksportir Catat! Ini 15 Paduan Besi yang Ekspornya Wajib Lewat PT DSI**

Ferry Sandi, CNBC Indonesia

**P**ERHATIAN publik terhadap kebijakan baru tata kelola ekspor selama ini lebih banyak tertuju pada komoditas kelapa sawit dan batu bara. Namun pemerintah juga memasukkan paduan besi atau ferroalloy ke dalam daftar komoditas sumber daya alam yang akan diatur secara khusus.

Kebijakan tersebut tertuang dalam Peraturan Menteri Perdagangan (Permendag) Nomor 17 Tahun 2026 tentang Kebijakan dan Pengaturan Ekspor Komoditas Sumber Daya Alam Strategis Paduan Besi, dimana aturan baru ini menjadi bagian dari implementasi Peraturan Pemerintah Nomor 24 Tahun 2026.

"Semangatnya adalah ekspor komoditas SDA paduan besi hanya dapat dilakukan oleh BUMN ekspor," kata Direktur Ekspor Produk Industri dan Pertambangan Kementerian Perdagangan Muhammad Rifa'i Abbas, Selasa (9/6/2026).

Dalam aturan baru tersebut, pemerintah mengelompokkan ferroalloy ke dalam beberapa kategori. Sebagian dikenakan kewajiban laporan surveyor (LS), sebagian lainnya dapat diekspor tanpa LS, sementara beberapa jenis tertentu masuk kategori barang yang dilarang ekspor. Secara keseluruhan terdapat 15 pos tarif yang masuk dalam cakupan pengaturan Permendag Nomor 17 Tahun 2026.

"Pokok-pokok pengaturannya hampir sama, mungkin bedanya di cakupan komoditas paduan besinya itu mencakup 12 pos tarif 8 digit turunan HS 7202 yang diatur dengan LS serta 3 pos tarif 8 digit turunan HS 7202 yang diatur tanpa LS," ujarnya.

## **Exporters Take Note! These 15 Iron Alloys Must Be Exported Through PT DSI**

Ferry Sandi, CNBC Indonesia

**P**UBLIC attention regarding the new export management policy has so far focused primarily on palm oil and coal. However, the government has also included ferroalloys in the list of natural resource commodities subject to special regulation.

This policy is stated in the Regulation of the Minister of Trade (Permendag) Number 17 of 2026 concerning the Policy and Regulation of the Export of Strategic Natural Resource Commodities of Iron Alloys, where this new regulation is part of the implementation of Government Regulation Number 24 of 2026.

"The spirit is that the export of iron alloy natural resource commodities can only be carried out by state-owned exporting companies," said the Director of Industrial and Mining Product Exports at the Ministry of Trade, Muhammad Rifa'i Abbas, Tuesday (9/6/2026).

In the new regulation, the government categorizes ferroalloys into several categories. Some are subject to a surveyor's report (LS), others can be exported without a LS, and certain types fall under the category of prohibited export items. In total, 15 tariff lines fall under the scope of Trade Ministerial Regulation No. 17 of 2026.

"The main points of the regulations are almost the same, perhaps the difference lies in the scope of the iron alloy commodity, which includes 12 8-digit tariff lines derived from HS 7202 regulated by LS and 3 8-digit tariff lines derived from HS 7202 regulated without LS," he said.

Selama masa transisi hingga akhir 2026, perusahaan yang selama ini melakukan ekspor ferroalloy masih dapat menjalankan kegiatan ekspornya dengan ketentuan yang berlaku saat ini. Namun eksportir diwajibkan menyampaikan pelaporan kepada BUMN ekspor.

Mulai 1 Januari 2027, mekanisme ekspor ferroalloy akan diimplementasikan secara penuh. Pada fase ini, ekspor hanya dapat dilakukan oleh BUMN ekspor, kecuali bagi pihak yang memperoleh pengecualian sesuai ketentuan pemerintah, yakni yang telah memiliki kontrak atau perjanjian dengan pemerintah yang berkaitan dengan investasi, divestasi maupun kegiatan pengolahan dan pemurnian di dalam negeri.

"Mulai 1 Januari ekspor paduan besi hanya dapat diekspor oleh BUMN ekspor," tegas Rifa'i.

Berikut 15 Jenis Paduan Besi:

1. HS 7202.11.00 (fero mangan dengan kadar  $\geq 60\%$  Mn) - harus LS
2. HS 7202.19.00 (fero mangan dengan kadar  $\geq 60\%$  Mn) - harus LS
3. HS 7202.21.00 (mengandung silikon lebih dari 55% menurut beratnya) - dilarang ekspor
4. HS 7202.29.00 (logam paduan/fero silikon dengan kadar  $\geq 75\%$  Fe) - harus LS
5. HS 7202.30.00 (fero silikon mangan dengan kadar  $\geq 60\%$  Mn) - harus LS
6. HS 7202.41.00 (logam paduan/fero kromium dengan kadar  $\geq 75\%$  Fe) - harus LS
7. HS 7202.49.00 (logam paduan/fero kromium dengan kadar  $\geq 75\%$  Fe) - harus LS
8. HS 7202.50.00 (fero-silikon-kromium) - bebas pengendalian khusus

During the transition period until the end of 2026, companies currently exporting ferroalloys may continue their export activities under current regulations. However, exporters are required to submit reports to the state-owned exporting company.

Starting January 1, 2027, the ferroalloy export mechanism will be fully implemented. During this phase, exports can only be conducted by state-owned exporting companies, except for those granted exemptions under government regulations, namely those with existing contracts or agreements with the government relating to investment, divestment, or domestic processing and refining activities.

"Starting January 1, iron alloy exports can only be exported by state-owned exporting companies," Rifa'i emphasized.

Here are 15 types of iron alloys:

1. HS 7202.11.00 (ferrous manganese with a content of  $\geq 60\%$  Mn) – must be LS
2. HS 7202.19.00 (ferrous manganese with a content of  $\geq 60\%$  Mn) – must be LS
3. HS 7202.21.00 (containing more than 55% silicon by weight) – prohibited for export
4. HS 7202.29.00 (silicon alloy/ferrous metal with  $\geq 75\%$  Fe content) – must be LS
5. HS 7202.30.00 (ferrous silicon manganese with a content of  $\geq 60\%$  Mn) – must be LS
6. HS 7202.41.00 (chromium alloy/ferrous metal with  $\geq 75\%$  Fe content) – must be LS
7. HS 7202.49.00 (chromium alloy/ferrous metal with  $\geq 75\%$  Fe content) – must be LS
8. HS 7202.50.00 (ferro-silicon-chromium) – free of special controls

- |   |  |
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| <p>9. HS 7202.60.00 (fero nikel/FeNi dalam bentuk bongkahan/lumps, ingot, nugget FeNi, atau sponge FeNi dengan kadar tertentu) - harus LS</p> <p>10. HS 7202.70.00 (fero molibdenum dengan kadar <math>\geq 75\%</math> Fe) - harus LS</p> <p>11. HS 7202.80.00 (logam paduan/fero-tungsten dan ferrosilikon-tungsten dengan kadar <math>\geq 75\%</math> Fe) - harus LS</p> <p>12. HS 7202.91.00 (fero titanium dengan kadar <math>\geq 65\%</math> Ti dan fero-silikon-titanium dengan kadar <math>\geq 75\%</math> Fe) - harus LS</p> <p>13. HS 7202.92.00 (fero vanadium dengan kadar <math>\geq 75\%</math> Fe) - harus LS</p> <p>14. HS 7202.93.00 (fero niobium) - bebas pengendalian khusus</p> <p>15. HS 7202.99.00 (lain-lain) - bebas pengendalian khusus. (fys/wur)</p> | <p>9. HS 7202.60.00 (ferrous nickel/FeNi in the form of lumps, ingots, FeNi nuggets, or FeNi sponges with certain grades) – must be LS</p> <p>10. HS 7202.70.00 (ferrous molybdenum with a content of <math>\geq 75\%</math> Fe) – must be LS</p> <p>11. HS 7202.80.00 (ferro-tungsten and ferrosilicon-tungsten alloys with a content of <math>\geq 75\%</math> Fe) – must be LS</p> <p>12. HS 7202.91.00 (ferro titanium with a content of <math>\geq 65\%</math> Ti and ferro-silicon-titanium with a content of <math>\geq 75\%</math> Fe) – must be LS</p> <p>13. HS 7202.92.00 (ferrous vanadium with a content of <math>\geq 75\%</math> Fe) – must be LS</p> <p>14. HS 7202.93.00 (ferrous niobium) – free from special control</p> <p>15. HS 7202.99.00 (other) – free from special controls. (fys/wur)</p> |
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## Harga Batu Bara Jatuh Usai Terbang, Ada Alarm Bahaya Buat Pengusaha RI

mae, CNBC Indonesia

**H**ARGA batu bara ambruk setelah terbang dan menyentuh level US\$ 150 per ton.

Merujuk Refinitiv, harga batu bara pada perdagangan Senin (8/6/2026), ditutup di posisi US\$146,95 per ton atau jatuh 2,26%.

Pelemahan ini berbanding terbalik dengan lonjakan harga pada Senin di mana batu bara tembus US\$ 150,35 per ton. Posisi ini adalah yang tertinggi sejak Oktober 2024 atau 20 bulan atau hampir dua tahun.

## Coal Prices Plunge After a Flight, Warnings for Indonesian Entrepreneurs

mae, CNBC Indonesia

**C**OAL prices collapsed after flying and touching the level of US\$ 150 per ton.

According to Refinitiv, coal prices closed at US\$146.95 per ton on Monday (June 8, 2026), down 2.26%.

This weakening contrasts with Monday's price surge, when coal reached US\$ 150.35 per ton. This was the highest level since October 2024, or 20 months, or almost two years.

Harga batu bara melemah mengikuti harga minyak karena keduanya saling substitusi.

Pada perdagangan Selasa kemarin, kontrak berjangka minyak mentah West Texas Intermediate (WTI) turun 3,4% dan ditutup pada US\$88,20 per barel.

Sementara itu, minyak brent jatuh 2,98% ke US\$ 91,45 per barel. Harga peutupan kemarin adalah yang terendah sejak 20 April 2026 atau dalam tujuh pekan.

Kendati secara global melemah, harga batu bara termal di pelabuhan utama China utara masih bertahan kuat meski permintaan belum sepenuhnya pulih.

Kenaikan harga batu bara di area tambang menjadi penopang utama pasar setelah sejumlah produsen di wilayah penghasil utama China mulai menaikkan harga jual di tengah membaiknya permintaan dari trader dan sektor non-kelistrikan serta masih ketatnya pengawasan keselamatan tambang.

Namun, ruang kenaikan harga dinilai terbatas. Pasalnya, konsumsi dari sektor hilir masih relatif lesu sementara stok batu bara di pelabuhan utama kawasan Bohai tetap tinggi. Persediaan gabungan di pelabuhan Qinhuangdao, Caofeidian, Jingtang, dan Huanghua tercatat mencapai sekitar 28,8 juta ton pada awal Juni.

Di sisi lain, pasar batu bara impor menghadapi tekanan. Batu bara Indonesia berkalori rendah (low-CV) untuk pengiriman cepat mengalami pelemahan harga akibat melimpahnya pasokan dan tingginya stok di pelabuhan China bagian selatan. Kondisi tersebut memaksa sejumlah penjual menawarkan diskon untuk menarik minat pembeli.

Bahkan, beberapa pemasok memilih melepas kargo dengan harga lebih murah saat kapal sudah mendekati pelabuhan tujuan guna menghindari membengkaknya biaya demurrage atau biaya tunggu kapal. Meski pasar spot masih lesu,...

Coal prices have weakened following oil prices because the two are substitutes for each other.

In trading last Tuesday, West Texas Intermediate (WTI) crude oil futures fell 3.4% and closed at US\$88.20 per barrel.

Meanwhile, Brent crude oil fell 2.98% to US\$91.45 per barrel. Yesterday's closing price was the lowest since April 20, 2026, or in seven weeks.

Despite the global downturn, thermal coal prices at major ports in northern China remain strong, even though demand has not fully recovered.

Rising coal prices in mining areas have become a major market driver after several producers in China's main producing regions began raising selling prices amid improving demand from traders and the non-electricity sector, as well as continued strict mine safety oversight.

However, room for price increases is considered limited. This is because downstream consumption remains relatively sluggish, while coal stocks at major ports in the Bohai region remain high. Combined inventories at the ports of Qinhuangdao, Caofeidian, Jingtang, and Huanghua were recorded at approximately 28.8 million tons in early June.

On the other hand, the imported coal market is facing pressure. Prices of Indonesian low-calorie (low-CV) coal for fast delivery have weakened due to abundant supply and high inventories at ports in southern China. This situation has forced some sellers to offer discounts to attract buyers.

In fact, some suppliers are choosing to release cargo at lower prices as the vessel approaches its destination port to avoid inflated demurrage costs. Although the spot market remains sluggish,...

Meski pasar spot masih lesu, harga kontrak forward relatif bertahan karena pelaku pasar memperkirakan pasokan bisa lebih ketat pada semester II-2026.

Bagi Indonesia, kondisi ini menjadi sinyal bahwa prospek jangka pendek batu bara kalori rendah masih menghadapi tekanan. Tingginya stok di China, pasokan yang melimpah, dan lemahnya aktivitas pembelian spot berpotensi membatasi kenaikan harga ekspor. Meski demikian, dukungan dari kenaikan biaya produksi batu bara domestik China diperkirakan dapat menahan penurunan harga lebih dalam.

Sementara itu, pasar kokas metalurgi China menunjukkan dinamika berbeda. Harga kokas di pasar fisik masih relatif kokoh karena ditopang mahalannya harga batu bara kokas (coking coal) dan pasokan yang ketat. Namun, kontrak berjangka (futures) kokas justru mengalami tekanan karena investor mulai mengkhawatirkan prospek permintaan baja ke depan serta maraknya aksi ambil untung.

Perbedaan arah antara pasar fisik dan pasar berjangka tersebut menunjukkan pelaku pasar masih melihat dukungan biaya dalam jangka pendek, tetapi mulai mewaspadaai potensi pelemahan permintaan yang dapat menekan harga kokas dalam beberapa bulan mendatang. (mae/mae)

Although the spot market remains sluggish, forward contract prices have remained relatively stable as market participants expect tighter supply in the second half of 2026.

For Indonesia, this situation signals that the short-term prospects for low-calorie coal remain under pressure. High inventories in China, abundant supply, and weak spot buying activity have the potential to limit export price increases. However, support from rising domestic coal production costs in China is expected to prevent further price declines.

Meanwhile, China's metallurgical coke market exhibited different dynamics. Coke prices in the physical market remained relatively strong, supported by high coking coal prices and tight supply. However, coke futures contracts came under pressure as investors began to worry about the future steel demand outlook and profit-taking intensified.

The divergence in direction between the physical and futures markets indicates that market participants still see short-term cost support but are starting to be wary of potential weakening demand, which could depress coke prices in the coming months. (mae/mae)



## **DSI Mau Tarik Biaya Ekspor SDA, Penambang Minta Adil & Transparan**

Sabrina Mulia Rhamadanty

**P**ERHIMPUNAN Ahli Pertambangan Indonesia (Perhapi) menilai penarikan margin keuntungan dalam skema ekspor sumber daya alam (SDA) oleh PT Danantara Sumber Daya Indonesia (DSI) merupakan hal yang dapat dimaklumi.

## **DSI Wants to Collect Natural Resource Export Fees, Miners Demand Fairness and Transparency**

Sabrina Mulia Rhamadanty

**T**HE **INDONESIAN** Mining Experts Association (Perhapi) considers PT Danantara Sumber Daya Indonesia (DSI)'s withdrawal of profit margins in the natural resource (SDA) export scheme to be understandable.

Namun, Perhapi menekankan pentingnya transparansi agar kebijakan tersebut tidak mencekik kelangsungan hidup para produsen komoditas yang terdampak kebijakan ekspor satu pintu.

Ketua Umum Perhapi Sudirman Widhy Hartono menyatakan, sebagai lembaga yang menjalankan skema ekspor satu pintu tersebut, DSI memang membutuhkan dana operasional. Dana tersebut dinilai wajar jika diambil dari margin keuntungan penjualan ekspor.

"Terkait dengan penentuan margin, dapat dimaklumi jika pihak DSI pun memerlukan dana untuk operasionalnya yang dapat diambil dari sebagian margin keuntungan dari penjualan ekspor komoditas SDA tersebut," ujar Sudirman saat dihubungi, Selasa (9/6/2026).

Meski dianggap wajar, Sudirman mengingatkan agar besaran margin yang ditetapkan harus mengacu pada regulasi yang berlaku, yaitu Peraturan Pemerintah (PP) Nomor 24 Tahun 2026 tentang Tata Kelola Ekspor Komoditas Sumber Daya Alam (SDA) Strategis.

Dia juga memperingatkan dampak buruk jika PT DSI menetapkan margin yang terlampau besar dengan memotong hak yang seharusnya diterima oleh produsen. Langkah sepihak seperti itu dikhawatirkan dapat mematikan roda bisnis sektor produksi.

"Menetapkan margin yang sangat besar dengan cara mengambil sebagian margin yang seharusnya menjadi hak produsen tentu saja akan mematikan kelangsungan usaha dari produsen tersebut," tegasnya.

Sebagai solusi, Perhapi menyarankan agar proses penentuan tingkat margin dilakukan secara terbuka dan akuntabel.

Sudirman mendorong adanya ruang dialog antara pihak DSI dan produsen untuk mencapai kesepakatan bersama.

However, Perhapi emphasized the importance of transparency so that the policy does not strangle the livelihoods of commodity producers affected by the one-stop export policy.

Perhapi Chairman Sudirman Widhy Hartono stated that, as the institution implementing the one-stop export scheme, DSI does require operational funds. It is considered reasonable to draw these funds from the profit margin of export sales.

"Regarding margin determination, it is understandable that DSI also requires funds for its operations, which can be taken from a portion of the profit margin from export sales of these natural resource commodities," Sudirman said when contacted on Tuesday (June 9, 2026).

Although considered reasonable, Sudirman reminded that the margin amount set must refer to the applicable regulations, namely Government Regulation (PP) Number 24 of 2026 concerning the Governance of Strategic Natural Resource (SDA) Commodity Exports.

He also warned of the dire consequences if PT DSI sets excessively high margins, cutting into producers' rights. Such a unilateral move is feared to stifle the production sector's business.

"Setting a very large margin by taking a portion of the margin that should be the producer's right will certainly kill the continuity of the producer's business," he stressed.

As a solution, Perhapi suggests that the process of determining margin levels be carried out openly and accountably.

Sudirman encouraged the creation of a dialogue space between DSI and producers to reach a mutual agreement.

"Kami sangat menyarankan agar sebaiknya ada transparansi dan akuntabel untuk penentuan tingkat margin yang ditetapkan oleh DSI, yang dibicarakan dan disepakati dengan pihak produsen guna memastikan fairness [keadilan] di antara kedua belah pihak," pungkask Sudirman.

Sebelumnya, Chief Operational Officer (COO) BPI Danantara Dony Oskaria menyatakan PT DSI akan menerapkan biaya layanan guna mendukung skema ekspor SDA satu pintu.

Hal ini diungkap Dony terkait dengan kewenangan PT DSI yang dapat menentukan margin dalam tingkat kewajaran dari proses ekspor SDA tersebut.

Untuk diketahui, kewenangan margin tercantum pada Pasal 3 ayat 4 PP Nomor 24/2026 yang ditekan pada 20 Mei 2026.

"[Hal] yang dimaksudkan dengan margin untuk tahap pertama ini adalah untuk layanan yang kita berikan, hanya layanan," ungkap Dony kepada awak media usai konferensi pers di gedung DPR RI, Senayan, Jakarta Pusat, Senin (8/6/2025).

Dony juga memastikan bahwa komponen yang ditarik murni merupakan biaya atas jasa atau layanan yang diberikan PT DSI, bukan komisi layaknya perantara dagang.

"Jadi tidak pernah terpikirkan kita tiba-tiba menjadi calo. Harganya 5, kemudian kita tambahkan 5 lagi, kita jual 10, *enggak* laku *dong* barang. Sekarang sudah ada acuan harga internasionalnya kan. Itu [margin] hanya terhadap servis yang *di-provide* oleh DSI," tambahnya.

Adapun, proses ini dinilai penting untuk memberikan jaminan, baik dari segi volume maupun harga kesepakatan, sebelum SDA dikirim ke luar negeri.

"We strongly recommend that there be transparency and accountability in determining the margin levels set by DSI, which are discussed and agreed upon with producers to ensure fairness between both parties," Sudirman concluded.

Previously, BPI Danantara Chief Operational Officer (COO) Dony Oskaria stated that PT DSI would implement a service fee to support the one-stop natural resource export scheme.

Dony revealed this in relation to PT DSI's authority to determine the margin within the reasonable level of the natural resource export process.

For your information, margin authority is stated in Article 3 paragraph 4 of PP Number 24/2026 which was issued on May 20, 2026.

"[What] is meant by the margin for this first phase is for the services we provide, just services," Dony told the media crew after a press conference at the Indonesian House of Representatives building, Senayan, Central Jakarta, Monday (June 8, 2025).

Dony also confirmed that the components withdrawn were purely fees for services provided by PT DSI, not commissions like those of a trade intermediary.

"So, it never occurred to us to suddenly become scalpers. The price is 5, then we add another 5, and then we sell it for 10, *but the goods won't sell* . Now there's an international price reference, right? That [margin] is only for the services provided by DSI," he added.

Meanwhile, this process is considered important to provide guarantees, both in terms of volume and agreed price, before natural resources are sent abroad.

"Contoh misalkan untuk memastikan bahwa itu benar [volume dan harga ekspor], tentu ada inspeksi. Jadi harganya itu bukan margin kemudian kita seolah-olah jadi calo, bukan demikian. Setiap layanan yang diberikan [ada biayanya], kalau tidak ada layanannya masak orang diambil marginnya? Tentu tidak begitu," tambahnya.

Dony juga menegaskan fokus utama dari kebijakan pintu satu ini adalah mengoptimalkan volume ekspor komoditas nasional dengan perolehan harga terbaik di pasar internasional, yang pada akhirnya dapat mendongkrak pendapatan negara.

"Jadi kita tentu kita tidak mau melakukan kesalahan yang sama. *Toh*, tujuan kita sebetulnya adalah bagaimana komoditas kita bisa diekspor dengan banyak-maksimal dengan harga yang baik," tutupnya.

Sebelumnya, Presiden RI Prabowo Subianto secara resmi telah merilis aturan PP No. 24/2026.

Peraturan ini dibentuk pemerintah untuk mendukung kinerja PT DSI sebagai BUMN khusus, yang pada tahap pertama akan melakukan ekspor tiga komoditas, yaitu batu bara, minyak kelapa sawit atau *crude palm oil* (CPO), dan paduan besi (*ferro allo*).

Adapun, dalam BAB III Pasal 3 Ayat (4) PP No. 24/2026 tertulis, BUMN ekspor (PT DSI) dapat menentukan margin dalam tingkat kewajaran sesuai peraturan perundang-undangan.

"BUMN ekspor dalam rangka pelaksanaan ekspor komoditas SDA strategis sebagaimana dimaksud pada Ayat (1) dapat menentukan margin dalam tingkat kewajaran sesuai dengan ketentuan peraturan perundang-undangan," PP No. 24/2026 Pasal 3 Ayat (4).

"For example, to ensure that the export volume and price are correct, there are inspections. So, the price isn't a margin, and we're acting like middlemen, which isn't the case. Every service provided [has a fee]; if there's no service, *why would* someone take a margin? Of course not," he added.

Dony also emphasized that the main focus of this single-gate policy is to optimize the export volume of national commodities by obtaining the best prices on the international market, which can ultimately boost state revenue.

"So, of course, we don't want to make the same mistakes. *After all*, our real goal is to export as many of our commodities as possible at a good price," he concluded.

Previously, Indonesian President Prabowo Subianto officially released PP No. 24/2026.

This regulation was established by the government to support the performance of PT DSI as a special state-owned enterprise, which in the first stage will export three commodities, namely coal, palm oil or *crude palm oil* (CPO), and iron alloys (*ferro alloy*).

Meanwhile, in Chapter III Article 3 Paragraph (4) of PP No. 24/2026 it is written that the export BUMN (PT DSI) can determine margins at a reasonable level in accordance with statutory regulations.

"State-owned enterprises exporting in the context of implementing the export of strategic natural resource commodities as referred to in paragraph (1) can determine margins at a reasonable level in accordance with the provisions of laws and regulations," PP No. 24/2026 Article 3 Paragraph (4).

Kemudian, pada Pasal 3 Ayat (1) tertulis, "Komoditas SDA strategis sebagaimana dimaksud dalam Pasal 2 hanya dapat diekspor oleh BUMN ekspor baik sebagai pemilik atau sebagai perantara tunggal."

Pasal 3 Ayat (2) menyebut, "Dalam pelaksanaan ekspor komoditas SDA strategis oleh BUMN ekspor sebagaimana dimaksud pada Ayat (1), harga jual komoditas SDA strategis ditentukan oleh BUMN ekspor."

Adapun, Pasal 3 Ayat (3) tertulis bahwa BUMN ekspor sebagaimana dimaksud pada ayat (1) ditetapkan sesuai dengan ketentuan peraturan perundang-undangan di bidang BUMN. (smr/wdh)

Then, in Article 3 Paragraph (1) it is written, "Strategic natural resource commodities as referred to in Article 2 may only be exported by exporting BUMNs either as owners or as sole intermediaries."

Article 3 Paragraph (2) states, "In implementing the export of strategic natural resource commodities by exporting BUMNs as referred to in Paragraph (1), the selling price of strategic natural resource commodities is determined by the exporting BUMN."

Meanwhile, Article 3 Paragraph (3) states that the exporting BUMN as referred to in paragraph (1) is determined in accordance with the provisions of laws and regulations in the BUMN sector. (smr/wdh)



## **Mau Direlaksasi, RKAB Batu Bara Disarankan Naik Jadi 700 Juta Ton**

Azura Yumna Ramadani Purnama

**P**AKAR industri mineral dan batu bara (minerba) menyarankan kuota produksi batu bara dalam Rencana Kerja dan Anggaran Biaya (RKAB) 2026 direvisi naik menjadi sekitar 700 juta ton, dari sebelumnya sekitar 600 juta ton.

Ketua Indonesian Mining and Energy Forum (IMEF) Singgih Widagdo menilai kuota produksi di sekitar 700 juta ton merupakan besaran yang rasional dalam menghadapi perkembangan pasar batu bara; domestik dan global.

Singgih mengungkapkan saran tersebut telah memperhitungkan realisasi produksi pada tahun lalu di rentang 790-817 juta ton dan kenaikan produksi batu bara China dan India.

## **Coal RKAB Recommended to Increase to 700 Million Tons Due to Relaxation**

Azura Yumna Ramadani Purnama

**M**INERAL and coal industry experts have suggested that the coal production quota in the 2026 Work Plan and Budget (RKAB) be revised upwards to around 700 million tonnes, from the previous 600 million tonnes.

The chairman of the Indonesian Mining and Energy Forum (IMEF), Singgih Widagdo, assessed that a production quota of around 700 million tons is a reasonable figure in the face of developments in the domestic and global coal markets.

Singgih revealed that the recommendation took into account last year's production realization of 790-817 million tons and the increase in coal production in China and India.

“Dengan produksi 2025 sebanyak 790 juta ton dan catatan volume produksi di setiap perusahaan, termasuk kondisi kenaikan produksi China dan India; saya melihat relaksasi sampai sekitar 700 juta lebih rasional dalam menghadapi [perkembangan] pasar. Tentunya termasuk kebutuhan domestik, baik kelistrikan umum maupun industri,” kata Singgih ketika dihubungi, Selasa (9/6/2026).

Singgih meyakini revisi kuota produksi dalam RKAB 2026 yang bakal dilakukan pemerintah bakal memperbaiki margin keuntungan penambang, selama harga jual masih di atas biaya produksi per ton.

Di sisi lain, pemerintah juga bakal untung sebab penerimaan negara bukan pajak (PNBP) hingga setoran perpajakan bakal meningkat, jika nantinya produksi batu bara meningkat.

“Persetujuan ataupun relaksasi mencerminkan tanggung jawab dalam mengelola sumber daya manusia, keuangan perusahaan, investasi oleh bank, pendapatan daerah, PNBP, pajak perusahaan, serta perputaran ekonomi daerah melalui efek pengganda [*multiplier effect*] yang dihasilkannya,” ucapnya.

Jika disetujui, kata dia, penambang bakal memanfaatkan revisi kuota RKAB untuk meningkatkan penjualan di pasar *spot*. Sementara itu, pasokan untuk kontrak jangka panjang, diprediksi telah dicanangkan jauh-jauh hari oleh penambang.

### **Tiga Tahunan**

Lebih lanjut, Singgih juga menilai persetujuan RKAB per tiga tahun lebih memberikan kepastian bagi penambang, utamanya dalam menyiapkan pasokan batu bara untuk kontrak jangka panjang.

“Relaksasi akhirnya akan lebih mengarah kepentingan mengisi pasar *spot*. Untuk pasar longterm semestinya kepastian RKAB dari tahun ke tahun menjadi sangat penting. Bahkan RKAB selama 3 tahun menjadi sangat baik,” tegas Singgih.

“With 2025 production of 790 million tons and record production volumes at every company, including rising production in China and India, I see a relaxation of around 700 million tons as more rational in facing market developments. This, of course, includes domestic demand, both for general electricity and industrial use,” Singgih said when contacted on Tuesday (June 9, 2026).

Singgih believes the government's planned revision of production quotas in the 2026 Work Plan and Budget (RKAB) will improve miners' profit margins, as long as the selling price remains above the production cost per ton.

On the other hand, the government will also benefit because non-tax state revenue (PNBP) and tax payments will increase if coal production increases.

“The approval or relaxation reflects responsibility in managing human resources, corporate finances, bank investments, regional income, non-tax state revenues (PNBP), corporate taxes, and regional economic turnover through the resulting multiplier effect,” he said .

If approved, he said, miners would utilize the revised RKAB quotas to increase sales on the *spot market*. Meanwhile, supply for long-term contracts is predicted to have been planned well in advance by miners.

### **Three Years**

Furthermore, Singgih also assessed that the approval of the three-year RKAB provides more certainty for miners, especially in preparing coal supplies for long-term contracts.

“The relaxation will ultimately be more geared towards filling the *spot market*. For the long-term market, certainty about the annual budget (RKAB) is crucial. In fact, the three-year RKAB has been excellent,” Singgih emphasized.

Sekadar informasi, Menteri Energi dan Sumber Daya Mineral (ESDM) Bahlil Lahadlia mengungkapkan bahwa pihaknya akan melakukan relaksasi terhadap target RKAB batu bara sepanjang 2026.

"Kita selalu mengikuti perkembangan dengan kita akan melakukan relaksasi [RKAB] yang terukur. Artinya, kalau harganya bagus kita akan meningkatkan produksi. Kalau harganya mulai mentok kita juga akan membuat kebijakan agar supply and demand itu bisa kita jaga," ujar Bahlil dalam konferensi pers di gedung DPR, Senin (8/6/2026).

Adapun, salah satu alasan untuk melakukan relaksasi menurut Bahlil adalah terkait dengan pergerakan geopolitik yang terjadi akibat adanya ketegangan di Timur Tengah yang mempengaruhi fluktuasi harga komoditas global.

"Maka idealnya pemerintah atau pengusaha atau rakyat pun berkepentingan untuk harga yang bagus, produksi kita juga harus banyak. Supaya pengusahanya untung, negara untung, rakyatnya juga bisa mendapat dampak positif," ungkap Bahlil.

Adapun, Direktur Jenderal Mineral dan Batu Bara (Dirjen Minerba) Kementerian ESDM Tri Winarno mengungkapkan revisi RKAB 2026 bakal dimulai Juli 2026.

Nantinya porsi kuota produksi yang disetujui bakal mempertimbangkan potensi penerimaan negara yang didapat.

Tri memberikan kisi-kisi, untuk komoditas batu bara hingga 15 Mei 2026 produksinya diklaim menurun, tetapi penerimaan negara yang didapat tergolong stabil.

Kondisi tersebut, kata Tri, terjadi di tengah kenaikan harga batu bara yang belakangan terjadi.

For your information, the Minister of Energy and Mineral Resources (ESDM), Bahlil Lahadlia, revealed that his office will relax the coal RKAB target throughout 2026.

"We are closely monitoring developments and will implement measured relaxations of the [RKAB]. This means that if prices are good, we will increase production. If prices start to plateau, we will also implement policies to maintain supply and demand," Bahlil said in a press conference at the House of Representatives building on Monday (June 8, 2026).

Bahlil stated that one of the reasons for the relaxation is related to geopolitical movements resulting from tensions in the Middle East, which have affected global commodity price fluctuations.

"So, ideally, the government, businesses, and the people should all be interested in good prices, and our production should also be high. This will benefit businesses, the country, and the people," Bahlil said.

Meanwhile, the Director General of Minerals and Coal (Dirjen Minerba) of the Ministry of Energy and Mineral Resources, Tri Winarno, revealed that the revision of the 2026 RKAB will begin in July 2026.

Later, the approved production quota portion will take into account the potential state revenues obtained.

Tri provided a hint that coal production is expected to decline by May 15, 2026, but state revenues are relatively stable.

This condition, said Tri, occurred amidst the recent increase in coal prices.

"Poin yang kita sampaikan kan kita akan menjual mineral dan batu bara sesuai dengan harga yang seharusnya, kira-kira *gitu*. Jangan juga obral terlalu murah, tetapi jangan juga sampai kebutuhan kita terganggu," kata Tri kepada awak media di kompleks parlemen, akhir pekan lalu.

Tri juga menjelaskan pengajuan revisi RKAB yang dimulai bulan depan bakal ditutup pada 31 Juli 2026. Namun, dia masih belum dapat mengungkapkan tenggat waktu persetujuan yang diberikan Kementerian ESDM.

Sekadar informasi, kuota produksi batu bara 2026 yang disetujui Kementerian ESDM berada di sekitar 600 juta ton, turun dari realisasi produksi pada 2025 sebanyak 817,48 juta ton.

Berdasarkan catatan Kementerian ESDM, hingga April 2026 Indonesia telah memproduksi 229 juta ton batu bara atau sekitar 38,2% dari kuota produksi sekitar 600 juta ton.

Dari besaran itu, sekitar 145 juta ton dari produksi batu bara Indonesia diserap untuk pasar ekspor.

Sisanya, sekitar 84 juta ton, batu bara Indonesia digunakan untuk memenuhi kewajiban wajib pasok domestik - *domestic market obligation (DMO)*. (azr/wdh)

"The point we're making is that we will sell minerals and coal at the appropriate price, roughly. Don't sell them too cheaply, but don't let our needs be compromised either," Tri told the media at the parliamentary complex last weekend.

Tri also explained that the submission of revised RKAB, which begins next month, will close on July 31, 2026. However, he was still unable to reveal the approval deadline set by the Ministry of Energy and Mineral Resources.

For your information, the 2026 coal production quota approved by the Ministry of Energy and Mineral Resources is around 600 million tons, down from the 2025 production of 817.48 million tons.

According to the Ministry of Energy and Mineral Resources, Indonesia has produced 229 million tons of coal by April 2026, or approximately 38.2% of its production quota of approximately 600 million tons.

Of that figure, around 145 million tonnes of Indonesian coal production is absorbed for the export market.

The remaining 84 million tons of Indonesian coal is used to meet the *domestic market obligation (DMO)*. (azr/wdh)



## **Biaya Operasional Bengkak Akibat Dolar, IMA: Relaksasi Batu Bara Jadi Angin Segar**

Yurika

**I**NDONESIAN Mining Association (API-IMA) menegaskan komitmennya untuk mendukung penuh kebijakan relaksasi produksi batu bara, secara terukur demi kepentingan nasional.

## **IMA: Coal Relaxation a Breath of Fresh Air as Operating Costs Swell Due to Dollar**

Yurika

**T**HE INDONESIAN Mining Association (API-IMA) affirmed its commitment to fully support the coal production relaxation policy, in a measured manner for the sake of the national interest.

IMA menyambut baik kebijakan relaksasi terukur pada Rencana Kerja dan Anggaran Biaya (RKAB) dan kuota produksi batu bara. Kebijakan ini memungkinkan penyesuaian produksi agar lebih adaptif terhadap dinamika harga pasar global sembari tetap memastikan pasokan untuk kebutuhan dalam negeri terpenuhi.

Direktur Eksekutif API-IMA, Sari Esayanti, menegaskan kebijakan relaksasi yang terukur ini sangat krusial untuk memastikan sektor pertambangan tetap tangguh dan mampu memberikan kontribusi maksimal terhadap perekonomian nasional di tengah ketidakpastian global.

Ia menyebut kebijakan relaksasi produksi ini menjadi semakin relevan bagi pelaku usaha di tengah tren penguatan kurs dolar AS saat ini. Di satu sisi, kenaikan dolar memang menguntungkan karena transaksi ekspor batu bara menggunakan mata uang dolar, sehingga pendapatan yang dikonversi ke Rupiah akan meningkat. Namun, di sisi lain, pelaku usaha juga tengah menghadapi beban pembengkakan biaya operasional (*operational cost*).

"Kita tahu bahwa komponen utama operasional tambang, seperti bahan bakar, alat berat, dan suku cadang, sangat bergantung pada impor yang harganya terkerek naik akibat kuatnya dolar," kata Sari, dalam keterangan tertulis, (8/6/2026).

Menurut Sari, relaksasi ini memberikan ruang bagi perusahaan untuk mengompensasi tingginya biaya operasional. Apabila melihat situasi nyata di lapangan, tekanan biaya operasional yang tinggi dan penurunan kuota produksi telah membuat beberapa tambang terpaksa menghentikan produksinya.

"Kebijakan relaksasi dari Kementerian ESDM ini menjadi angin segar yang dapat menjamin keberlanjutan operasi pertambangan dan sangat penting untuk mencegah potensi Pemutusan Hubungan Kerja (PHK)," ujar Sari.

The IMA welcomes the measured relaxation of the Work Plan and Budget (RKAB) and coal production quotas. This policy allows for production adjustments to be more adaptive to global market price dynamics while ensuring domestic supply is met.

API-IMA Executive Director Sari Esayanti emphasized that this measured relaxation policy is crucial to ensuring the mining sector remains resilient and able to make a maximum contribution to the national economy amid global uncertainty.


He stated that this production relaxation policy is becoming increasingly relevant for businesses amid the current strengthening trend of the US dollar. On the one hand, a rising dollar is beneficial because coal export transactions are denominated in dollars, thus increasing revenue converted to rupiah. However, on the other hand, businesses are also facing the burden of soaring operational costs.

"We know that key components of mining operations, such as fuel, heavy equipment, and spare parts, are highly dependent on imports, the prices of which have been driven up by the strong dollar," Sari said in a written statement (June 8, 2026).


According to Sari, this relaxation provides companies with room to compensate for high operational costs. Looking at the actual situation on the ground, the pressure of high operational costs and reduced production quotas have forced several mines to halt production.

"This relaxation policy from the Ministry of Energy and Mineral Resources is a breath of fresh air that can ensure the sustainability of mining operations and is crucial for preventing potential layoffs," said Sari.

Di samping menyelamatkan kelangsungan industri dan tenaga kerja, IMA meyakini bahwa momentum tingginya harga komoditas yang dipadukan dengan penguatan dolar AS dan adanya kebijakan relaksasi ini, akan berdampak sangat signifikan terhadap proyeksi penerimaan negara.

"Kita selalu mengikuti perkembangan dengan kita akan melakukan relaksasi (RKAB) yang terukur. Artinya, kalau harganya bagus kita akan meningkatkan produksi. Kalau harganya mulai mentok kita juga akan membuat kebijakan agar supply and demand itu bisa kita jaga," ujar Menteri Energi dan Sumber Daya Mineral (ESDM), Bahlil Lahadalia, dalam konferensi pers di gedung DPR, Senin (8/6/2026). 

In addition to safeguarding the sustainability of industry and the workforce, IMA believes that the momentum of high commodity prices, combined with the strengthening of the US dollar and the relaxation of these policies, will have a significant impact on projected state revenues.

"We are closely monitoring developments and will implement measured relaxations (of the Budget and Work Plan). This means that if prices are good, we will increase production. If prices start to plateau, we will also implement policies to maintain supply and demand," said Minister of Energy and Mineral Resources (ESDM), Bahlil Lahadalia, in a press conference at the House of Representatives (DPR) building on Monday (June 8, 2026). 



### **Kebijakan Minerba Tak Berubah Bahlil Pastikan Aturan Tambang Tetap Stabil**

Reporter : Novalliandy, Editor : Saiful Bahri

**P**EMERINTAH memastikan tidak ada perubahan kebijakan di sektor mineral dan batubara (minerba), menyusul munculnya informasi mengenai penerapan skema *gross split* dalam pengelolaan sumber daya energi.

Kepastian tersebut diberikan untuk menjaga iklim investasi dan usaha bagi pelaku pertambangan. Penegasan itu disampaikan Menteri Energi dan Sumber Daya Mineral (ESDM) Bahlil Lahadalia usai rapat Percepatan Pertumbuhan ekonomi nasional bersama pimpinan DPR RI di gedung DPR, Jakarta, Senin (8/6/2026).

### **Mineral and Coal Policy Remains Unchanged**

### **Bahlil Ensures Mining Regulations Remain Stable**

Reporter: Novalliandy, Editor: Saiful Bahri

**T**HE GOVERNMENT has confirmed that there will be no policy changes in the minerals and coal (minerba) sector, following the emergence of information regarding the implementation of a *gross split* scheme in energy resource management.

This assurance is intended to maintain a favorable investment and business climate for mining players. The Minister of Energy and Mineral Resources (ESDM), Bahlil Lahadalia, made the statement after a meeting on the Acceleration of National Economic Growth with the leadership of the Indonesian House of Representatives (DPR RI) at the DPR building in Jakarta on Monday (June 8, 2026).


"Skema *gross split* hanya diterapkan pada sektor minyak dan gas bumi (migas). Sementara seluruh ketentuan yang berlaku di sektor minerba tetap mengacu pada regulasi yang ada saat ini," kata Bahlil dalam keterangan resmi Kementerian ESDM, Senin (8/6/2026).

Menurut Ketua umum Partai Golkar itu, klarifikasi tersebut perlu disampaikan untuk menghindari kesalahpahaman di kalangan pelaku usaha terkait kebijakan di sektor ESDM.

Pemerintah, lanjut dia, berkomitmen menjaga kepastian regulasi agar kegiatan usaha pertambangan dapat berjalan tanpa gangguan. Bahlil juga memastikan tidak ada rencana perubahan terhadap aturan yang saat ini menjadi dasar operasional perusahaan tambang.

"Teman-teman pelaku usaha tambang yang existing sekarang tidak perlu khawatir. Kebijakan apa pun tidak ada perubahan, tugas saya untuk menjaga itu," ujarnya.

Dalam rapat tersebut, Pemerintah juga membahas keberlanjutan program hilirisasi nasional yang menjadi strategi utama untuk meningkatkan nilai tambah sumber daya alam. Pembahasan difokuskan pada upaya menjamin pasokan bahan baku bagi industri pengolahan dan pemurnian (smelter) yang telah beroperasi maupun yang masih dalam tahap pembangunan.

Bahlil mengatakan, Pemerintah memiliki tanggung jawab menjaga keseimbangan antara kapasitas produksi komoditas tambang dan kebutuhan industri dalam negeri. Karena itu, penyusunan serta pemberian Rencana Kerja dan Anggaran Biaya (RKAB) akan mempertimbangkan kebutuhan bahan baku untuk mendukung keberlangsungan investasi hilirisasi. 


"The *gross split* scheme only applies to the oil and gas sector. Meanwhile, all applicable provisions in the mineral and coal sector remain subject to existing regulations," Bahlil said in an official statement from the Ministry of Energy and Mineral Resources on Monday (June 8, 2026).

According to the Golkar Party Chairman, this clarification needs to be conveyed to avoid misunderstandings among business actors regarding policies in the ESDM sector.

The government, he continued, is committed to maintaining regulatory certainty so that mining business activities can proceed without disruption. Bahlil also confirmed that there are no plans to change the regulations that currently underpin mining companies' operations.

"Existing mining business owners don't need to worry. There are no changes to the policy; it's my job to maintain that," he said.

During the meeting, the government also discussed the sustainability of the national downstreaming program, a key strategy for increasing the added value of natural resources. The discussion focused on ensuring raw material supplies for both operational and under-construction processing and refining industries (smelters).

Bahlil stated that the government has a responsibility to maintain a balance between mining commodity production capacity and domestic industrial needs. Therefore, the preparation and issuance of the Work Plan and Budget (RKAB) will consider raw material requirements to support the sustainability of downstream investment. 



## **Trade Ministry to route all coal exports through PT DSI by 2027**

Translator: Maria Cicilia Galuh Prayudhia, Yashinta Difa; Editor: M Razi Rahman

**T**HE TRADE Ministry has issued a new regulation that will centralize all Indonesian coal exports under a designated state-owned enterprise (SOE).

Under Minister of Trade Regulation (Permendag) No. 15 of 2026, the government will implement a phased transition before granting state-owned giant PT Danantara Sumberdaya Indonesia (PT DSI) exclusive exporting rights.

"The initial spirit is that exports of the strategic commodity coal can only be carried out by the government," the ministry's Director of Exports of Industrial and Mining Products, Muhammad Rivai Abbas, told reporters at an online briefing on Tuesday (June 9).

"However, there need to be adjustments along the way, so this transition will be carried out in stages," he added.

The transition period runs from June 1 to December 31, 2026. During this timeframe, private mining companies with valid Registered Exporter (ET) status can still ship coal independently.

However, they are now required to submit all export documents, sales contracts, and relevant data to PT DSI via an integrated electronic system. Exporters must use existing ET and Surveyor Reports (LS) under their own names.

The government plans to conduct an official evaluation of the new export governance framework within the first three months of its implementation, according to Abbas.

Full state centralization will take effect on January 1, 2027, when PT DSI takes full control. From this date forward, PT DSI will manage the entire export process, covering all pre-customs, customs and post-customs procedures.


To facilitate this, PT DSI will be required to hold a specialized mining business permit (IUP) for transportation and sales, alongside fulfilling standard administrative and surveyor report obligations.

The mandate covers eight specific tariff posts, including four derivative tariff posts under HS 2701, two derivative tariff posts under HS 2702 and two derivative tariff posts under HS 2703.

However, the ministry has outlined several exemptions to the rigid ET and LS requirements. Non-commercial shipments—such as coal destined for research and development, exhibition samples, or re-exported surplus—are exempt.

Exceptions also apply to companies exporting non-coal products that happen to share the restricted HS codes, and to legacy exporters whose permits have expired but who still hold legal, pre-existing production stock.

The ministry warned that all exporters must continue to electronically submit realization reports directly to the government, regardless of whether a shipment was successfully realized.

Companies that fail to comply with these digital reporting rules will face strict administrative sanctions. 

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## yahoo!finance

### **Indonesia's New Nickel Mining Rules Could Spark A Chinese Exodus**

Tim Treadgold, Contributor

**INDONESIA's** nickel boom is fading but the Chinese technology which made it possible could soon start a similar surge of overproduction of the battery metal in Africa.

A flood of Indonesian nickel has been the prime cause of a collapse in the price of the metal which is also used to make stainless steel.

Over the last four years the price of nickel has crashed from \$30,000 a ton to less than \$18,000/t but did drop to a low as \$14,200 late last year.

It was the fall in mid-December which served as a wake-up call for the government of Indonesia that the nickel industry which it had actively encouraged was doing more harm than good.

As well as surface mining clearing extensive tracts of forest the electricity demands of the mainly Chinese owned and operated nickel smelters required the burning of large amounts of coal.

Tighter government regulations, including reduced mining and export quotas along with higher taxes, has led to some mine closures and reduced operations of the preferred nickel processing technology using rotary kiln electric furnaces (RKEF).

#### **Chines Miners Annoyed**

The new rules are also straining the once close relationship between the government and Chinese mining and metal processing companies which are reported to be planning investment in other countries, including Tanzania, Madagascar and New Caledonia.

The new Indonesian mining and processing regulations are a factor in a forecast from a nickel industry lobby group that this year could see a global nickel deficit for the first time since 2021.

The International Nickel Study Group is expecting a surplus of around 280,000 tons of nickel last year to flip into a deficit of 32,000 tons this year.

Warnings that Indonesia's encouragement of nickel production would cause long-term environmental problems were largely ignored by the country's government until now and follow an increase in international denunciation.

The most recent criticism came from a research organization, the Australian Institute of International Affairs (AIIA) which last month published a paper title "Indonesia's nickel boom was built on an illusion".

The AIIA report started by saying that a political bargain behind Indonesia's nickel boom is beginning to unravel.

"What Indonesia created was not a mature industrial ecosystem but a heavily subsidized extraction-and-processing machine dependent on cheap coal power, permissive regulation and relentless expansion regardless of long-term market realities," the AIIA said.

In effect, Indonesia had allowed itself to be used by Chinese miners and metal processors to produce cheap metal for export to China's vast manufacturing sector without careful consideration of the environmental and economic costs.

### **Exit Strategy**

The Chinese miners are complaining about the tougher regulations, but they are also working on an exit strategy.

According to a Reuters news report last week China's Tsingshan group is considering a nickel development in Madagascar while another Chinese miner, Lygend Resources is looking at opportunities in Tanzania and on the Pacific island of New Caledonia.

*This article was originally published on Forbes.com*

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## **KITCO** NEWS

### **China's aluminum exports surged in May as Iran war keeps supply tight**

By Reuters

**C**HINA's aluminum exports surged in May, according to official customs data released on Tuesday, as disruptions to shipment and production in the Gulf region due to the Iran war kept global supply tight.

China's unwrought aluminum and product exports climbed 5.68% in May to 632,000 metric tons.

And in the first five months of 2026, unwrought aluminum and product exports surged 10.4% to 2.69 million tons, customs data showed.

May exports outstripped April's already strong levels — the highest in at least a year — and extended gains since the war began.

The conflict damaged two of the largest aluminum facilities in the Gulf region, which accounts for 8% of the world's output, and effectively shut the key Strait of Hormuz waterway.

Primary aluminum output in the Gulf region tumbled in April to its weakest in more than a decade at 330,000 tons, according to the International Aluminium Institute (IAI). It was down 35% from the same month in 2025.

Global primary output fell 2.1% year on year to 5.92 million tons, but estimated Chinese production rose 1.5% to 3.68 million tons, IAI said.

Elsewhere, China's exports of aluminum stranded wire – included in a separate customs category from unwrought aluminum and aluminum products – jumped in April. Traders have been looking to repurpose this product, normally used in power transmission and distribution, to export aluminum after the rally and tax gap opened an arbitrage window.

(By Dylan Duan and Lewis Jackson; Editing by Christopher Cushing and Shri Navaratnam)



## **Cokal Secures RKAB Approval, Targets Mid-June Mining Restart and Coal Shipment**


By Sharecafe Team

**T**HE METALLURGICAL coal producer has received key regulatory clearance, paving the way for renewed operations and infrastructure upgrades at its Indonesian projects.

Cokal Limited (ASX: CKA), an Australian listed company with the objective of becoming a metallurgical coal producer with a global presence, today announced it has received crucial RKAB (Rencana Kerja dan Anggaran Biaya) approval for its Bumi Barito Mineral (BBM) Project in Central Kalimantan, Indonesia. This significant regulatory clearance supports current operational requirements and ensures the continuity of mining activities. Following the approval, the company anticipates recommencing mining operations by mid-June, contingent on the completion of site preparation and dewatering activities. Cokal is also finalising an export shipment of approximately 10,000 metric tonnes of Low Vol Hard Coking Coal, scheduled for delivery by the end of June.

The company has progressed several operational fronts, with hauling activities already resumed, moving coal to stockpiles at Krajan jetty, ready for barging once river conditions permit. A key operational milestone was achieved with the successful completion of the first controlled blast at Pit 3 on June 4, expected to enhance mining efficiency and productivity. Infrastructure upgrades at the Batu Tuhup Jetty are also underway, including road widening, installation of a Bulk Loading Conveyor, and a 250 TPH roller crusher system, designed to improve loading efficiency and coal quality consistency.

Looking ahead, Cokal's underground mining development is advancing through the regulatory process, with environmental permitting targeted for completion by Q4 2026. Furthermore, the company continues its haul road upgrade project with PT Petrindo Jaya Kreasi Tbk, with PT Petrosea Tbk appointed as the main contractor. This all-weather haul road is designed to support an expected haulage capacity of approximately 3 million tonnes per annum, with construction activities, particularly in Segment B, currently progressing with equipment mobilisation.

The global coking coal market continues to experience subdued conditions due to soft steel demand, maintaining pressure on hard coking coal pricing. However, Low Vol Hard Coking Coal retains structural demand due to its importance in steelmaking. Cokal remains committed to regulatory compliance, with an RKAB revision application planned for late June to align approved volumes with updated production requirements. 

**mint** | Markets

## **Copper Advances as Mideast Tensions Ease and Stocks Climb**

By Bloomberg

**COPPER** rose along with some other industrial metals as tensions eased in the Middle East, boosting risk appetite.

The advance added to copper's gains made on Monday after Iran and Israel agreed to halt strikes against each other, while US President Donald Trump renewed his claims of momentum toward ending the conflict. The recent flare-up had threatened to derail negotiations to end the wider regional conflict, which has stoked inflation and raised the prospect of higher interest rates that could slow global growth and metals demand.

Copper climbed as much as 1.2% on Tuesday, getting a further boost after Bloomberg reported that China is preparing to spend around 2 trillion yuan (\$295 billion) over the next five years on building data centers across the country. Global spending on data-center infrastructure has become a key pillar in the bullish demand outlook for copper over recent months.

Sustained strong demand for the metal means prices will rise to \$6.50 a pound (\$13,000 a ton) in 2027 and an average of \$8 a pound (\$17,636 a ton) in 2030 and 2031, according to Jefferies analysts, who adopted a previous bullish scenario as their new base case.

Copper rose 1% to \$13,755.50 a ton by 12:27 p.m. local time on the London Metal Exchange, reversing earlier losses of as much as 0.5%. Other base metals were mixed, with zinc and tin climbing, while aluminum dropped 0.8% after a surge in Chinese exports.

China's overall exports in May were up more than 19% from a year earlier, topping forecasts as booming demand for artificial intelligence hardware offset disruptions from the Iran war. That bodes well for industrial metals demand.

Still, expectations for the US Federal Reserve to raise rates and risks around AI stocks have led some bullish investors to exit, said Zhenting Zhou, a trader with Hangzhou Chenglian Industrial Co.

A recent selloff in tech stocks highlighted risks to base metals like copper and tin, which are used in electrical equipment, though markets rose on Tuesday. Aggregate open interest for copper on the Shanghai Futures Exchange has fallen to the lowest since September, according to bourse data. 

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THE ECONOMIC TIMES

## **Gold drops as oil climbs on renewed US-Iran hostilities**

By Reuters

**GOLD** prices fell more than 1% on Wednesday, as oil prices rose on renewed hostilities between the U.S. and Iran, fuelling concerns about inflation and interest rate hikes.

Spot gold fell 1.4% to \$4,203.20 per ounce by 0050 GMT. Bullion hit its lowest level since March 23 on Tuesday.

U.S. gold futures for August delivery were down 1.4% at \$4,227.

The dollar rose, making greenback-priced bullion more expensive for holders of other currencies. [US/]

The United States on Tuesday launched strikes against Iran after President Donald Trump said Tehran had shot down a U.S. Apache helicopter in the Strait of Hormuz, deepening doubts over a potential peace deal and further straining a fragile ceasefire.


Oil prices rose 1% on Wednesday, stoking concerns around inflation and higher-for-longer interest rates.

Traders are now pricing in a more than 70% chance of a Federal Reserve rate hike by December, according to the CME FedWatch tool. [FEDWATCH]

While gold is seen as a hedge against inflation, higher interest rates tend to weigh on the non-yielding metal.

Markets are awaiting key U.S. inflation reports this week, including the May Consumer Price Index data, due later in the day, and the Producer Price Index reading on Thursday, to assess the Fed's monetary policy stance.

India's sharp increase in gold import tariffs is fuelling a resurgence in smuggling that could exceed 100 metric tons this year, as soaring grey market margins allow smugglers to undercut banks and refiners of the precious metal.

Spot silver fell 1.4% to \$64.48 per ounce, platinum lost 1.5% to \$1,700.38, and palladium fell 0.8% to \$1,212.67. 

## **China reaffirms Japan rare earth ban despite US request**

Staff Writer

**C**HINA has doubled down on its months-long restriction on exports of rare earth products to Japan despite reports of the US asking Beijing to lift the measures.

In January, China's Ministry of Commerce officially announced an export ban on dual-use items — including those made of rare earth elements— that would be intended for Japanese military use, after tensions escalated between the two Asian powerhouses from their respective stances on Taiwan.

On Tuesday, the Chinese government reaffirmed that the export ban remains in place, with Spokesperson of the Ministry of Foreign Affairs Lin Jian reiterating that rare earths remain classified as “dual-use materials” under Chinese laws that prohibit their export to the Japanese government for military purposes.

While it has choked off shipments to Japan, China's rare earth exports have been seen rising in recent months, with the latest customs data showing exports reaching a fourth-month high in May. Still, the export figures remain down compared to this time last year.

Lin's statement came as he was asked by *Bloomberg* about an earlier report by *Nikkei* claiming that the US government had asked China to allow the resumption of rare earth metal sales to Japan due to concerns over the global supply chain related to Japan's technology sector.

In addition to containing remilitarization, the move was also to slow Japan's attempt to possess nuclear weapons, Lin also said.

To alleviate the impacts of the Chinese export ban, Japan has been ramping up efforts to form rare earth partnerships with its Group of Seven peers. These include the formation of a "trilateral buyers" club with France and Canada, as well as a A\$1.6 billion deal with Australia to strengthen its supply chain. 



## **Mali gold revenue rises 6.4% in 2025 despite production decline**

By Reuters

**G**OLD mining companies operating in Mali paid the state a record 888.5-billion CFA francs (\$1.57-billion) in 2025, up 6.4% from 835.1 billion CFA francs the year before, as record gold prices offset lower output, mines ministry data reviewed by Reuters showed.

Mali hosts more than 15 industrial mining companies owned by multinational groups.

They include Barrick Mining, B2GOLD, Resolute Mining, Endeavour Mining and Hummingbird Resources.

According to the ministry's data, taxes accounted for 66.1% of the sector's contribution in 2025 and customs duties represented 10.5%.

A further 23.3% came from State revenue classified as "domaines", consisting mainly of dividends paid to the government as a shareholder in mining companies.

The ministry did not comment officially on the reasons behind the increase in revenue.

A senior ministry official, speaking on condition of anonymity because they were not authorised to brief the press, said record-high gold prices in 2025 had offset losses linked to lower production.

Mali's industrial gold production fell by 23% in 2025 to 42.2 metric tons from 54.8 tons in 2024, mainly due to the suspension of Barrick Gold's operations for more than six months over a dispute with the government. 