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Dibayangi Sentimen Kebijakan Ekspor Satu Pintu, Simak Rekomendasi Saham ITMG

Reporter: Vendy Yhulia Susanto | Editor:
Anna Suci Perwitasari

PT INDO Tambangraya Megah Tbk (ITMG) mencatat penurunan laba bersih pada kuartal I – 2026. Adanya kebijakan ekspor satu pintu melalui PT Danantara Sumberdaya Indonesia (DSI) diperkirakan menjadi salah satu risiko yang berdampak ke kinerja ITMG ke depan.

Axell Ebenhaezer, Analis NH Korindo Sekuritas Indonesia menyoroti pembentukan Danantara Sumberdaya Indonesia (DSI) yang akan bertindak sebagai perantara dalam mengeksport komoditas utama, termasuk batubara.

Meski pemerintah bersikeras bahwa DSI hanya akan mengelola dan mengawasi proses ekspor untuk memperketat tata kelola, masih ada kekhawatiran bahwa model ekspor "satu pintu" ini menimbulkan risiko serius berupa monopoli perdagangan, inefisiensi operasional, dan potensi korupsi.

"Kebijakan ini berpotensi mengurangi daya saing batubara Indonesia di pasar internasional dan menekan margin keuntungan pelaku sektor swasta," ujar Axell dalam risetnya pada 22 Juni 2026.

Analisis Ciptadana Sekuritas Asia, Ryan Santoso mengatakan, dua fase regulasi ekspor tersebut membawa risiko yang sangat berbeda. Pada fase transisi (1 Juni – 31 Agustus 2026), transaksi masih akan dilakukan langsung dengan pembeli luar negeri; hanya dokumentasinya yang disalurkan melalui DSI, yang bertindak sebagai penilai dan perantara. Fase ini sebagian besar bersifat administratif dan tidak memengaruhi keuangan perusahaan.

Overshadowed by the One-Stop Export Policy, Check Out ITMG's Stock Recommendations

Reporter: Vendy Yhulia Susanto | Editor:
Anna Suci Perwitasari

PT INDO Tambangraya Megah Tbk (ITMG) recorded a decline in net profit in the first quarter of 2026. The one-stop export policy through PT Danantara Sumberdaya Indonesia (DSI) is estimated to be one of the risks impacting ITMG's future performance.

Axell Ebenhaezer, an analyst at NH Korindo Sekuritas Indonesia, highlighted the formation of Danantara Sumberdaya Indonesia (DSI), which will act as an intermediary in exporting key commodities, including coal.

While the government insists that the DSI will only manage and supervise the export process to tighten governance, there are still concerns that this "one-stop shop" export model poses serious risks in the form of trade monopolies, operational inefficiencies, and potential corruption.

"This policy has the potential to reduce the competitiveness of Indonesian coal in the international market and squeeze profit margins for private sector players," Axell said in his research on June 22, 2026.

Ciptadana Sekuritas Asia analyst Ryan Santoso stated that the two phases of export regulations carry very different risks. In the transition phase (June 1– August 31, 2026), transactions will still be conducted directly with foreign buyers; only documentation will be channeled through DSI, which acts as an appraiser and intermediary. This phase is largely administrative and does not impact the company's finances.

Namun, pada fase kedua (1 September 2026 dan seterusnya), DSI diharapkan mengambil alih seluruh kontrak transaksi, menjadi pihak lawan langsung yang membeli dari produsen domestik dan menjual ke luar negeri.

"Kami melihat pemberlakuan harga batubara acuan (HBA) akan menaikkan harga jual rata-rata (ASP) ITMG, tetapi DSI kemungkinan akan mendapatkan margin. Kedua, pengalihan pembayaran melalui BUMN baru dapat mengubah waktu penyelesaian," jelas Ryan dalam risetnya pada 25 Mei 2026.

Ironisnya, pasar batubara yang diangkut me-lalui laut telah menguat setelah konflik AS-Iran, yang mengganggu pasokan LNG dan meningkatkan permintaan substitusi batubara.

Selain itu, ledakan di tambang batubara Liushenyu berpotensi memicu inspeksi keselamatan yang lebih ketat di provinsi penghasil batubara terbesar di China, mendukung permintaan batubara yang diangkut melalui laut.

"Meskipun demikian, fokus pasar secara bertahap bergeser melampaui perkiraan pendapatan dan momentum harga batubara, dengan investor sekarang lebih memperhatikan detail implementasi gerbang ekspor baru tersebut," ucap Ryan.

Sementara itu, Analisis BRI Danareksa Sekuritas, Abida Massi Armand mengatakan, prospek kinerja ITMG pada kuartal III – 2026 berpotensi solid didukung relaksasi RKAB mulai Juli yang membuka ruang peningkatan volume produksi, harga batubara ekspor yang masih kondusif di US\$ 120 – US\$ 130 per ton, dan keunggulan cash cost terendah di industri yang menjaga margin tetap kompetitif.

However, in the second phase (September 1, 2026 onwards), DSI is expected to take over all transaction contracts, becoming the direct counterparty buying from domestic producers and selling abroad.

"We believe the implementation of the coal reference price (HBA) will increase ITMG's average selling price (ASP), but DSI will likely gain a margin. Second, the transfer of payments through a new state-owned enterprise (BUMN) could change the settlement time," Ryan explained in his research on May 25, 2026.

Ironically, the seaborne coal market has strengthened following the US-Iran conflict, which disrupted LNG supplies and increased demand for coal substitutes.

Additionally, the explosion at the Liushenyu coal mine could potentially trigger stricter safety inspections in China's largest coal-producing province, supporting demand for seaborne coal.

"However, market focus is gradually shifting beyond revenue forecasts and coal price momentum, with investors now paying closer attention to the implementation details of the new export gateway," Ryan said.

Meanwhile, BRI Danareksa Sekuritas analyst Abida Massi Armand stated that ITMG's performance prospects in the third quarter of 2026 are potentially solid, supported by the relaxation of the Company's Work Plan and Budget (RKAB) starting in July, which opens up room for increased production volume, export coal prices that are still conducive at US\$120-US\$130 per ton, and the advantage of the lowest cash costs in the industry, which maintains competitive margins.

Abida mengatakan, tiga tantangan utama yang dihadapi ITMG antara lain normalisasi harga batubara global seiring permintaan China yang masih volatile, kewajiban DMO 25% - 30% pada harga US\$ 70 per ton yang membatasi realisasi harga jual rata-rata (ASP) gabungan, dan pelemahan rupiah yang menaikkan biaya operasional meski sebagian dikompensasi pendapatan ekspor berdenominasi dolar.

"Implementasi ekspor terpusat Danantara Sumberdaya Indonesia (DSI) yang berpotensi mengurangi fleksibilitas negosiasi ASP dan risiko normalisasi permintaan dari akselerasi transisi energi global," ucap Abida kepada Kontan, Senin (6/7/2026).

Sebelumnya, NH Korindo Sekuritas telah memodelkan produksi batubara hasil tambang sendiri milik ITMG yang menghadapi kontraksi signifikan sebagai akibat pengetatan produksi rencana kerja dan anggaran biaya (RKAB) batubara.

Namun, apa yang ditunjukkan pada kuartal pertama tahun 2026 adalah bahwa infrastruktur perdagangan dan pencampuran ITMG —yang dibangun selama bertahun-tahun melalui pembelian batubara pihak ketiga— dapat secara kredibel mengisi sebagian besar kekurangan produksi. Sehingga memungkinkan volume penjualan total yang dilaporkan bertahan jauh lebih baik daripada yang disarankan oleh pembacaan sederhana dari pemotongan RKAB.

"Mengingat hal ini, kami telah menaikkan perkiraan volume penjualan tahun 2026 kami menjadi 24,8 juta ton," ucap Axell.

Axell memproyeksikan, pendapatan dan laba bersih ITMG tahun 2026 masing-masing Rp 33,3 triliun dan Rp 3,54 triliun. Adapun pada tahun 2025, ITMG mengantongi pendapatan Rp 31 triliun dan laba bersih Rp 3,14 triliun.

Abida said that the three main challenges facing ITMG include the normalization of global coal prices as Chinese demand remains volatile, the 25% – 30% DMO obligation at a price of US\$ 70 per ton which limits the realization of the combined average selling price (ASP), and the weakening rupiah which increases operational costs although some of it is offset by dollar-denominated export revenue.

"The implementation of centralized exports by Danantara Sumberdaya Indonesia (DSI) has the potential to reduce the flexibility of ASP negotiations and risks demand normalization from the acceleration of the global energy transition," Abida told Kontan on Monday (July 6, 2026).

Previously, NH Korindo Sekuritas had modeled ITMG's own coal production, which faced a significant contraction as a result of tightening of the coal production work plan and cost budget (RKAB).

However, what the first quarter of 2026 demonstrated was that ITMG's trading and blending infrastructure—built over the years through third-party coal purchases—could credibly fill much of the production gap. This allowed reported total sales volumes to hold up far better than a simple reading of the RKAB cuts would suggest.

"With this in mind, we have raised our 2026 sales volume forecast to 24.8 million tonnes," Axell said.

Axell projects ITMG's revenue and net profit to be Rp 33.3 trillion and Rp 3.54 trillion, respectively, in 2026. In 2025, ITMG will earn Rp 31 trillion in revenue and Rp 3.14 trillion in net profit.

Axell merekomendasikan overweight saham ITMG dengan target harga Rp 25.250 per saham. Sementara Ryan dan Abida merekomendasikan buy saham ITMG dengan target harga masing – masing Rp 34.200 per saham dan Rp 27.300 per saham.

Adapun risiko yang perlu dicermati adalah risiko ketidakpastian alokasi RKAB, penurunan harga batubara akibat de-eskalasi Timur Tengah dan implementasi ekspor melalui DSI. 📌

Axell recommends overweight ITMG shares with a target price of Rp 25,250 per share. Meanwhile, Ryan and Abida recommend buying ITMG shares with target prices of Rp 34,200 per share and Rp 27,300 per share, respectively.

The risks that need to be considered are the risk of uncertainty in the allocation of the Work Plan and Budget (RKAB), the decline in coal prices due to the de-escalation in the Middle East and the implementation of exports through the DSI. 📌



Perkuat Kontribusi, Ini Strategi Antam Dongkrak Kinerja

Teti Purwanti, CNBC Indonesia

PT ANTAM (Persero) Tbk (ANTM) sebagai BUMN memiliki peran dan kontribusi nyata dalam mendorong roda perekonomian nasional. Di mana ANTM mencatatkan peningkatan kontribusi kepada negara sepanjang 2024 melalui Pendapatan Negara Bukan Pajak (PNBP), pajak, dan royalti senilai Rp 4,8 triliun. Angka ini tumbuh 43% dibandingkan realisasi 2023 sebesar Rp 3,36 triliun.

Hasil ini tidak lepas dari kinerja ANTM yang terus tumbuh secara berkelanjutan berkat mesin pendapatan perusahaan yang berasal dari emas dan juga Nikel.

Terkait emas, ANTM telah memperluas jaringan perdagangan produk logam mulia melalui kolaborasi dan memperkuat ekosistem emas nasional. Saat ini ANTM menyediakan produk emas fisik maupun emas fisik digital bagi masyarakat yang ingin berinvestasi.

Emas fisik digital ini menawarkan kemudahan karena kepemilikan dan transaksinya dapat diakses melalui ponsel. Bagi masyarakat...

Strengthening Contribution: Antam's Strategy to Boost Performance

Teti Purwanti, CNBC Indonesia

AS a state-owned enterprise (SOE), PT ANTAM (Persero) Tbk (ANTM) plays a significant role and contributes significantly to driving the national economy. ANTM recorded an increase in its contribution to the state throughout 2024 through Non-Tax State Revenue (PNBP), taxes, and royalties, totaling Rp 4.8 trillion. This figure represents a 43% increase compared to the 2023 realization of Rp 3.36 trillion.

These results are inseparable from ANTM's performance, which continues to grow sustainably thanks to the company's revenue engine, which comes from gold and nickel.

Regarding gold, ANTM has expanded its precious metal product trading network through collaboration and strengthened the national gold ecosystem. Currently, ANTM provides physical gold products and digital physical gold for people who want to invest.

This digital physical gold offers convenience because ownership and transactions can be accessed via mobile phone. For people...

Bagi masyarakat yang ingin berinvestasi emas tetapi tidak ingin repot menyimpan emas fisik, ANTM juga menyediakan produk BRANKAS atau Berencana Aman Kelola Emas. BRANKAS merupakan salah satu layanan penjualan Produk Emas Fisik Digital yang disediakan oleh ANTM.

Semakin tingginya minat pada emas juga tercermin dari kinerja apik ANTM, yang mencatatkan kinerja terbaik sepanjang sejarah pada 2025. ANTM mencatat pendapatan sebesar Rp84,64 triliun pada 2025, meningkat 22% dibandingkan tahun sebelumnya. Perseroan juga mencatatkan laba bersih tahun berjalan sebesar Rp7,92 triliun, tumbuh signifikan 106% dibandingkan capaian tahun 2024.

Kinerja ini didukung oleh penjualan emas ANTM yang tercatat mencapai Rp66,47 triliun sepanjang 2025 atau meningkat 15% dibandingkan Rp57,56 triliun pada 2024, ditopang oleh permintaan yang tetap kuat.

Direktur Utama ANTAM, Untung Budiharto, menyampaikan bahwa tahun 2025 menjadi tonggak penting dalam perjalanan Perseroan.

"Di tengah dinamika pasar global dan tantangan industri, ANTAM berhasil mencatatkan kinerja operasional dan keuangan terbaik sepanjang sejarah Perseroan," ujar Untung dikutip Jumat (3/7/2026).

Dia menegaskan capaian ini mencerminkan kuatnya fundamental bisnis, efektivitas strategi yang dijalankan secara disiplin, serta komitmen seluruh insan ANTM dalam mengoptimalkan potensi sumber daya mineral nasional untuk menciptakan nilai tambah yang berkelanjutan bagi seluruh pemangku kepentingan.

For people who want to invest in gold but don't want the hassle of storing physical gold, ANTM also offers BRANKAS, or Safe Gold Management Plan. BRANKAS is one of ANTM's digital physical gold product sales services.

The growing interest in gold is also reflected in ANTM's impressive performance, which recorded its best performance in history in 2025. ANTM recorded revenue of Rp84.64 trillion in 2025, a 22% increase compared to the previous year. The company also recorded a net profit for the year of Rp7.92 trillion, a significant 106% increase compared to 2024.

This performance was supported by ANTM's gold sales, which reached Rp66.47 trillion throughout 2025, a 15% increase compared to Rp57.56 trillion in 2024, supported by continued strong demand.

ANTAM's President Director, Untung Budiharto, stated that 2025 will be an important milestone in the Company's journey.

"Amidst global market dynamics and industry challenges, ANTAM has successfully recorded the best operational and financial performance in the Company's history," Untung said, as quoted on Friday (3/7/2026).

He emphasized that this achievement reflects the strength of business fundamentals, the effectiveness of the strategies implemented in a disciplined manner, and the commitment of all ANTM employees to optimizing the potential of national mineral resources to create sustainable added value for all stakeholders.

ANTM juga menjalankan bisnis emas terintegrasi dari hulu hingga hilir (mine to market) serta bersinergi dengan berbagai pihak untuk memberikan kemudahan, kenyamanan, dan keamanan bagi masyarakat dalam memiliki emas ANTM sebagai salah satu instrumen investasi yang aman dan terpercaya.

Selain itu, ANTM juga terus mendukung penguatan hilirisasi nikel sebagai fondasi utama dari ekosistem industri baterai listrik nasional. ANTM berkomitmen untuk menerima penugasan khusus dari pemerintah dalam rangka percepatan program hilirisasi nikel dan pengembangan ekosistem baterai kendaraan listrik.

Dalam jangka panjang, pertumbuhan industri baterai kendaraan listrik diharapkan dapat meningkatkan nilai tambah bisnis nikel perusahaan.

"Melalui berbagai proyek strategis yang terintegrasi, ANTM tidak hanya meningkatkan nilai tambah, tetapi juga mendukung penguatan kemandirian industri nasional serta posisi Indonesia dalam rantai pasok industri global," ungkap dia.

Penugasan tersebut mencakup pengembangan ekosistem baterai terintegrasi berbasis nikel dari hulu hingga hilir, yang meliputi kegiatan pertambangan, pembangunan pabrik RKEF/RKSBF, fasilitas HPAL, refinery, prekursor, katoda, battery cell, hingga fasilitas battery recycling.

Ada pun penugasan tersebut akan dilaksanakan melalui kerja sama ANTM dan PT Industri Baterai Indonesia (IBI) bersama HYD Investment Limited, konsorsium yang terdiri dari Zhejiang Huayou Cobalt Co., Ltd., EVE Energy Co., Ltd., dan PT Daaz Bara Lestari Tbk., sebagai mitra strategis dalam pengembangan ekosistem baterai kendaraan listrik terintegrasi di Indonesia.

ANTM also runs an integrated gold business from upstream to downstream (mine to market) and synergizes with various parties to provide convenience, comfort, and security for the public in owning ANTM gold as a safe and trusted investment instrument.

In addition, ANTM continues to support the strengthening of nickel downstream processing as the main foundation of the national electric battery industry ecosystem. ANTM is committed to accepting special assignments from the government to accelerate the nickel downstreaming program and develop the electric vehicle battery ecosystem.

In the long term, the growth of the electric vehicle battery industry is expected to increase the added value of the company's nickel business.

"Through various integrated strategic projects, ANTM not only increases added value but also supports the strengthening of national industrial independence and Indonesia's position in the global industrial supply chain," he said.

The assignment includes the development of an integrated nickel-based battery ecosystem from upstream to downstream, which includes mining activities, construction of RKEF/RKSBF factories, HPAL facilities, refineries, precursors, cathodes, battery cells, and battery recycling facilities.

The assignment will be carried out through a collaboration between ANTM and PT Industri Baterai Indonesia (IBI) together with HYD Investment Limited, a consortium consisting of Zhejiang Huayou Cobalt Co., Ltd., EVE Energy Co., Ltd., and PT Daaz Bara Lestari Tbk., as strategic partners in developing an integrated electric vehicle battery ecosystem in Indonesia.

"Pengembangan ekosistem ini diharapkan dapat meningkatkan nilai tambah sumber daya mineral nasional, memperluas sumber pendapatan Perseroan, memperkuat ketahanan bisnis jangka panjang, serta mendukung pertumbuhan berkelanjutan bagi seluruh pemangku kepentingan," ungkap Untung.

Diketahui sepanjang 2025, produksi bijih nikel ANTM mencapai sebesar 16,11 juta wet metric ton(wmt) atau meningkat 62% dibandingkan capaian produksi pada FY24 sebesar 9,94 juta wmt. Dari sisi pemasaran, penjualan bijih nikel tercatat sebesar 14,58 juta wmt, tumbuh 75% dibandingkan 2024 sebesar 8,35 juta wmt.

Didorong dengan meningkatnya permintaan domestik, 2025 menandai kinerja produksi dan penjualan bijih nikel ANTM sebagai yang tertinggi dalam lebih dari satu dekade terakhir sejak pemberlakuan larangan ekspor mineral.

Sementara untuk produk feronikel di tengah dinamika regulasi dalam negeri sepanjang 2025, ANTM menjaga stabilitas operasional dengan membukukan produksi sebesar 16.064 ton nikel dalam feronikel (TNi), dengan volume penjualan sebesar 10.528 TNi. (dpu/dpu)

"The development of this ecosystem is expected to increase the added value of national mineral resources, expand the Company's revenue sources, strengthen long-term business resilience, and support sustainable growth for all stakeholders," said Untung.

It is known that throughout 2025, ANTM's nickel ore production reached 16.11 million wet metric tons (wmt) or increased by 62% compared to the production achievement in FY24 of 9.94 million wmt. From the marketing side, nickel ore sales were recorded at 14.58 million wmt, growing 75% compared to 2024 of 8.35 million wmt.

Driven by increasing domestic demand, 2025 marked ANTM's highest nickel ore production and sales performance in more than a decade since the mineral export ban was implemented.

Meanwhile, for 9 of domestic regulations throughout 2025, ANTM maintained operational stability by recording production of 16,064 tons of nickel in ferronickel (TNi), with sales volume of 10,528 TNi. (dpu/dpu)

[Kontan.co.id](https://www.kontan.co.id)

Amankan Pasokan Batubara PLN, IMEF Desak Pemerintah Segera Evaluasi Harga DMO

Reporter: Arif Ferdianto | Editor: Noverius Laoli

LANGKAH PT Perusahaan Listrik Negara (Persero) atau PLN mengamankan tambahan pasokan batubara berkalori di atas 4.500 hingga akhir tahun 2026 dinilai penting demi mengantisipasi terulangnya pemadaman listrik bergilir sekaligus memperkuat Hari Operasi (HOP) pembangkit milik negara.

To secure PLN's coal supply, IMEF urges the government to immediately evaluate the DMO price

Reporter: Arif Ferdianto | Editor: Noverius Laoli

THE MOVE by PT Perusahaan Listrik Negara (Persero) or PLN to secure additional supplies of coal with a calorie content above 4,500 until the end of 2026 is considered crucial to anticipate the recurrence of rolling blackouts and to strengthen the operating days (HOP) of state-owned power plants.

Ketua Indonesian Mining and Energy Forum (IMEF), Singgih Widagdo menilai kepastian pasokan ini sangat mendesak demi keandalan kelistrikan nasional.

"Tentu sangat tepat jika Pemerintah (ESDM) memperkuat pasokan batubara spesifikasi medium rank coal agar Hari Operasi (HOP) PLN menjadi aman untuk keandalan kelistrikan nasional. Penambahan pasokan ini sangat penting sebelum PLN melakukan Retrofit PLTU batubara, yang tentu membutuhkan biaya dan waktu," ujarnya kepada Kontan.co.id, Senin (6/7/2026).

Singgih juga menepis anggapan adanya celah pengawasan dalam kewajiban pasar domestik atau Domestic Market Obligation (DMO) batubara sebagai pemicu krisis pasokan belakangan ini.

Menurutnya, seretnya pasokan ke PLN disebabkan oleh irisan kendala teknis dan dinamika geopolitik global.

Keterlambatan persetujuan Rencana Kerja dan Anggaran Biaya (RKAB) serta pecahnya konflik Timur Tengah terbukti mengerek biaya produksi batubara di tingkat hulu secara signifikan.

"Masalahnya bukan akibat celah dalam pengawasan DMO. Tapi krisis sebelumnya atau akhir-akhir ini memang akibat irisan berbagai masalah sejak dari keterlambatan persetujuan RKAB, Perang Israel ke Iran yang mengakibatkan harga energi meningkat tajam yang seterusnya menaikkan biaya produksi batubara per tonnya, juga harus diakui bahwa cadangan batubara medium sebatas 4,5 milyar ton dari total cadangan 31,9 iton," paparnya.

Sebagai solusi jangka panjang, Singgih merekomendasikan pemerintah untuk segera merevisi formula harga DMO yang dinilai sudah tidak relevan karena belum pernah diubah selama delapan tahun terakhir.

The Chairman of the Indonesian Mining and Energy Forum (IMEF), Singgih Widagdo, assessed that ensuring supply is very urgent for the sake of national electricity reliability.

"It would certainly be appropriate for the government (ESDM) to increase the supply of medium-rank coal to ensure PLN's operating days (HOP) are safe for national electricity reliability. This increased supply is crucial before PLN retrofits coal-fired power plants, which will require significant costs and time," he told Kontan.co.id on Monday (July 6, 2026).

Singgih also dismissed the notion that there were oversight gaps in the coal Domestic Market Obligation (DMO) as a trigger for the recent supply crisis.

According to him, the sluggish supply to PLN is caused by a combination of technical constraints and global geopolitical dynamics.

Delays in the approval of the Work Plan and Budget (RKAB) and the outbreak of the Middle East conflict have been proven to significantly increase coal production costs at the upstream level.

"The problem isn't due to gaps in DMO oversight. The previous and recent crises are the result of a combination of issues, from delays in the approval of the Work Plan and Budget (RKAB) to the Israeli-Iranian war, which led to a sharp increase in energy prices, which in turn increased the cost of coal production per ton. It must also be acknowledged that medium-grade coal reserves are limited to 4.5 billion tons out of a total of 31.9 billion tons," he explained.

As a long-term solution, Singgih recommended that the government immediately revise the DMO pricing formula, which is considered irrelevant because it has not been changed for the past eight years.

Dia bilang, penyesuaian harga pada level keekonomian yang adil dinilai krusial agar para produsen emas hitam tidak merugi ketika mendahulukan kebutuhan PLN daripada mengejar keuntungan besar dari pasar ekspor.

Mengingat sebagian besar cadangan merupakan batubara kualitas rendah (low rank coal), pemanfaatan teknologi pencampuran juga harus dioptimalkan. Singgih menyarankan agar penalti ketat diterapkan secara adil bagi emiten yang mangkir.

"Setelah revisi harga tidak merugikan pemasok dan penerapan harus fair untuk semua perusahaan. Langkah punishment harus dilakukan jika pemenuhan DMO tidak dilakukan. Bahkan sampai pelarangan ekspor (skala korporasi) dan bukan penutupan ekspor nasional," pungkasnya.

Diberitakan sebelumnya, guna mengantisipasi terulangnya pemadaman bergilir, PLN mengamankan tambahan pasokan batubara kalori menengah ke atas hingga akhir tahun ini.

Direktur Utama PLN, Darmawan Prasodjo mengungkapkan, penambahan pasokan ini merupakan langkah korektif bersama Kementerian ESDM atas menyusutnya produksi batubara kalori tinggi. Lewat penugasan khusus, PLN mendapat tambahan batubara kalori 4.500 ke atas di luar kontrak yang ada.

"Ini sebesar 1,8 juta ton on top dari existing supply untuk bulan Juli, dan 3 juta ton per bulan dari bulan Agustus sampai bulan Desember. Sehingga di sini ada penambahan kapasitas daya mampu pasok sebesar 5 GW di atas 35,9 GW, yang tentu saja ini membuat sistem pelistikan di Pulau Jawa menjadi jauh lebih andal lagi," ujarnya dalam Rapat Dengar Pendapat (RDP) dengan Komisi XII DPR RI, Jakarta, Kamis (2/7/2026).

He said that adjusting prices to a fair economic level is crucial to prevent black gold producers from incurring losses by prioritizing PLN's needs over pursuing substantial profits from the export market.

Given that the majority of reserves are low-rank coal, the use of blending technology must also be optimized. Singgih recommended that strict penalties be applied fairly to issuers who default.

"After the price revision, it won't harm suppliers, and its implementation must be fair to all companies. Punitive measures must be taken if DMO requirements aren't met. This could even lead to an export ban (on a corporate scale) rather than a national export shutdown," he concluded.

As previously reported, to anticipate a repeat of rolling blackouts, PLN has secured additional supplies of medium to high-calorie coal until the end of this year.

PLN President Director Darmawan Prasodjo explained that this additional supply is a joint corrective measure with the Ministry of Energy and Mineral Resources to address declining high-calorie coal production. Through a special assignment, PLN secured additional coal with a calorie rating of 4,500 and above, outside of existing contracts.

"This represents 1.8 million tons on top of the existing supply for July, and 3 million tons per month from August to December. So, there's an additional 5 GW of power supply capacity, above the existing 35.9 GW, which of course makes the electricity supply system on Java even more reliable," he said during a hearing with Commission XII of the Indonesian House of Representatives (DPR RI) in Jakarta on Thursday (July 2, 2026).

Darmawan mengungkapkan, tambahan pasokan ini diklaim mampu mendongkrak keandalan sistem kelistrikan di Pulau Jawa secara signifikan setelah sempat mengalami kendala.

Dia menyebut, pasokan ekstra ini menjadi solusi instan bagi PLN untuk menyelesaikan persoalan pemadaman bergilir yang sempat dikeluhkan oleh masyarakat dan pelaku industri.

"Ini tentu saja membuat sistem di Jawa ini yang tadinya memang kami mengakui adanya pemadaman bergilir ini sistemnya langsung meningkat menjadi jauh lebih andal," ungkapnya.

Darmawan menjelaskan, penurunan produksi batubara kalori menengah dan tinggi secara nasional sempat menjadi tantangan bagi pasokan pembangkit. Namun, berkat koordinasi intensif dengan Kementerian ESDM, Dirjen Ketenagalistrikan, serta Dirjen Minerba, kendala penyediaan energi primer ini akhirnya berhasil terkoreksi melalui mekanisme penugasan kontrak baru.

"Kami memberikan apresiasi luar biasa karena untuk bulan Juli ini alokasi penugasan dan kontrak yang sudah kami tindak lanjuti berjalan dengan baik kemudian diikuti juga dengan penugasan untuk bulan Agustus, September, Oktober, November, sampai bulan Desember," tandasnya. 🇮🇩

Darmawan revealed that this additional supply is claimed to be able to significantly boost the reliability of the electricity system on Java Island after previously experiencing problems.

He said that this extra supply was an instant solution for PLN to resolve the rolling blackouts that had been complained about by the public and industry players.

"This has certainly made the system in Java, which we previously acknowledged had rolling blackouts, become much more reliable," he said.

Darmawan explained that the decline in national medium- and high-calorie coal production had posed a challenge to power plant supply. However, thanks to intensive coordination with the Ministry of Energy and Mineral Resources, the Director General of Electricity, and the Director General of Mineral and Coal, this primary energy supply constraint was finally resolved through the assignment of new contracts.

"We express our utmost appreciation for the successful follow-up of assignments and contracts for July, followed by assignments for August, September, October, November, and December," he concluded. 🇮🇩



Harga Batu Bara Terbelah Dua Kasta, Ada yang Melonjak & Tersungkur

mae, CNBC Indonesia

HARGA batu bara turun empat hari beruntun meski dihujani banyak kabar baik.

Coal Prices Are Split Between Two Classes, Some Are Soaring and Some Are Falling

mae, CNBC Indonesia

COAL prices have fallen for four consecutive days despite a flood of good news.

Merujuk Refinitiv, harga batu bara pada perdagangan Senin (6/7/2026) ditutup di posisi US\$ 128,25 per ton. Harganya 0,58%.

Pelemahan ini memperpanjang derita batu bara yang sudah turun 0,93% dalam empat hari beruntun.

Harga batu bara melemah meski banyak kabar baik. Harga batu bara juga masih terbelah di mana jenis kokas naik sementara termal turun.

Pengiriman batu bara untuk seluruh keperluan dari Pelabuhan Gladstone di Queensland, Australia timur laut, mencapai 6,36 juta ton pada Juni 2026. Angka ini menjadi volume pengiriman bulanan tertinggi sepanjang semester pertama tahun ini, berdasarkan data terbaru dari Gladstone Ports Corporation (GPC).

Dikutip dari Mysteel Global, batu bara kokas menyumbang sekitar 70% dari total arus batu bara yang melalui Pelabuhan Gladstone, menjadikannya jalur ekspor utama bagi batu bara yang ditambang di wilayah tambang Queensland bagian tengah.

Dibandingkan Mei, volume pengiriman pada Juni melonjak 41%, sementara secara tahunan naik 13,6% dibandingkan Juni tahun lalu.

Pengiriman batu bara dari Pelabuhan Gladstone ke Jepang pada Juni melonjak 46% dibandingkan bulan sebelumnya dan naik 27% dibandingkan periode yang sama tahun lalu menjadi 2,24 juta ton. Volume tersebut merupakan yang tertinggi sejak November 2022.

Sementara itu, ekspor batu bara Australia ke China melalui pelabuhan tersebut meningkat 71% secara bulanan dan 5,5% secara tahunan menjadi 576.221 ton, sekaligus menjadi volume bulanan tertinggi sepanjang tahun ini.

According to Refinitiv, coal prices closed at US\$128.25 per ton on Monday (July 6, 2026), representing a 0.58% increase.

This decline extended the suffering of coal, which had already fallen 0.93% in four consecutive days.

Coal prices weakened despite much positive news. Coal prices also remained divided, with coking coal rising while thermal coal fell.

Coal shipments for all purposes from the Port of Gladstone in Queensland, northeastern Australia, reached 6.36 million tonnes in June 2026. This figure is the highest monthly shipment volume in the first half of this year, according to the latest data from Gladstone Ports Corporation (GPC).

According to Mysteel Global, coking coal accounts for approximately 70% of the total coal flow through the Port of Gladstone, making it a key export route for coal mined in the central Queensland mining region.

Compared to May, shipment volumes in June jumped 41%, while year-on-year they rose 13.6% compared to June last year.

Coal shipments from the Port of Gladstone to Japan in June surged 46% compared to the previous month and 27% compared to the same period last year, reaching 2.24 million tonnes. This volume is the highest since November 2022.

Meanwhile, Australian coal exports to China through the port rose 71% month-on-month and 5.5% year-on-year to 576,221 tonnes, the highest monthly volume so far this year.

Pada awal Juni, minat pembeli China terhadap batu bara Australia meningkat tajam setelah terjadi kelangkaan mendadak pasokan batu bara kokas domestik yang memicu lonjakan harga.

Banyak tambang di China diperintahkan menghentikan operasi untuk menjalani inspeksi keselamatan sejak akhir Mei, menyusul ledakan mematikan di sebuah tambang bawah tanah di Provinsi Shanxi, China utara.

Tambang Blackwater, yang mayoritas dimiliki oleh perusahaan Australia Whitehaven Coal Limited, umumnya mengirimkan batu baranya melalui jalur kereta api menuju Pelabuhan Gladstone untuk diekspor.

Di antara tujuan ekspor utama lainnya, pengiriman batu bara ke India mencapai 1,16 juta ton pada Juni, naik 11,5% dibandingkan Mei, namun turun 26% dibandingkan Juni tahun lalu.

Sementara itu, ekspor ke Korea Selatan turun 10,4% secara bulanan menjadi 1,29 juta ton. Meski demikian, dibandingkan periode yang sama tahun lalu, volume ekspor ke Korea Selatan masih melonjak 52%.

Secara keseluruhan, selama periode Januari-Juni 2026, total ekspor batu bara melalui Pelabuhan Gladstone mencapai 33,27 juta ton, meningkat 10,5% dibandingkan semester pertama tahun lalu.

El Nino Picu Permintaan Batu Bara

Fenomena cuaca Super El Niño tahun ini diperkirakan akan mendorong lonjakan permintaan listrik berbahan bakar batu bara di India selama 12 bulan ke depan. Hal itu disebabkan potensi kesenjangan pasokan listrik akibat suhu yang lebih tinggi, menurut laporan lembaga riset berbasis di Finlandia, Centre for Research on Energy and Clean Air (CREA) yang dirilis pada Senin.

In early June, Chinese buyers' interest in Australian coal surged sharply after a sudden shortage of domestic coking coal supplies triggered a price spike.

Many mines in China have been ordered to halt operations for safety inspections since late May, following a deadly explosion at an underground mine in northern China's Shanxi Province.

The Blackwater mine, which is majority owned by Australian company Whitehaven Coal Limited, generally ships its coal by rail to the Port of Gladstone for export.

Among other major export destinations, coal shipments to India reached 1.16 million tonnes in June, up 11.5% compared to May, but down 26% compared to June last year.

Meanwhile, exports to South Korea fell 10.4% month-on-month to 1.29 million tons. However, compared to the same period last year, export volumes to South Korea still jumped 52%.

Overall, during the January-June 2026 period, total coal exports through the Port of Gladstone reached 33.27 million tonnes, an increase of 10.5% compared to the first half of last year.

El Nino Triggers Coal Demand

This year's Super El Niño weather phenomenon is expected to drive a surge in demand for coal-fired electricity in India over the next 12 months, due to potential power supply gaps caused by higher temperatures, according to a report released Monday by the Finland-based Centre for Research on Energy and Clean Air (CREA).

Menurut CREA, El Niño akan memengaruhi berbagai sistem energi di seluruh dunia. Namun, dampaknya diperkirakan paling besar akan dirasakan oleh India.

Fenomena El Niño yang umumnya dikaitkan dengan kecepatan angin yang lebih rendah dan curah hujan yang berkurang diperkirakan akan menekan produksi listrik dari tenaga angin dan tenaga air di India. Akibatnya, akan muncul kesenjangan pasokan listrik yang kemungkinan besar akan ditutup melalui peningkatan pembangkitan listrik berbahan bakar batu bara.

"Jika penurunan produksi energi terbarukan dikombinasikan dengan meningkatnya permintaan listrik, India berpotensi menghadapi kesenjangan pembangkitan listrik hampir 18 terawatt-hour (TWh)," tulis para analis CREA dalam laporannya, dikutip dari Reuters.

Skenario yang paling mungkin saat ini adalah lonjakan pembangkitan listrik berbahan bakar batu bara, yang diperkirakan akan melepaskan sekitar 17 juta ton emisi CO₂.

Sebagai importir dan pengguna batu bara terbesar kedua di dunia setelah China, India masih sangat bergantung pada batu bara meskipun kapasitas energi terbarukannya terus berkembang pesat. Kehadiran Super El Niño dinilai dapat memperkuat alasan India untuk tetap mempertahankan penggunaan batu bara sebagai sumber energi utama.

Secara keseluruhan, pembangkitan listrik dan pembangunan kapasitas pembangkit berbahan bakar batu bara di India terus meningkat. Batu bara masih menjadi tulang punggung sistem kelistrikan negara tersebut dengan menyumbang sekitar 60% dari total produksi listrik nasional.

Meskipun pembangunan pembangkit energi terbarukan terus melaju, India tetap mengandalkan batu bara untuk memenuhi sebagian besar kebutuhan listriknya.

According to CREA, El Niño will impact various energy systems worldwide. However, its impact is expected to be felt most severely in India.

The El Niño phenomenon, generally associated with lower wind speeds and reduced rainfall, is expected to depress electricity production from wind and hydropower in India. This will create a power supply gap that will likely be filled through increased coal-fired power generation.

"If declining renewable energy production is combined with rising electricity demand, India could potentially face a power generation gap of nearly 18 terawatt-hours (TWh)," CREA analysts wrote in their report, as quoted by Reuters.

The most likely scenario currently is a surge in coal-fired electricity generation, which is estimated to release around 17 million tonnes of CO₂ emissions.

As the world's second-largest coal importer and consumer after China, India remains heavily reliant on coal despite its rapidly expanding renewable energy capacity. The Super El Niño is seen as strengthening India's case for maintaining coal as its primary energy source.

Overall, electricity generation and coal-fired generating capacity development in India continue to increase. Coal remains the backbone of the country's electricity system, contributing approximately 60% of total national electricity production.

Despite the continued growth in renewable energy development, India still relies on coal to meet most of its electricity needs.

Pemerintah juga berupaya menghindari risiko pemadaman listrik, terutama saat gelombang panas ekstrem meningkatkan konsumsi energi.

Penasihat energi di lembaga kajian kebijakan pemerintah India, NITI Aayog, Rajnath Ram, pada akhir tahun lalu mengatakan bahwa batu bara masih akan menjadi bagian penting dari sistem kelistrikan India selama dua dekade ke depan.

"Kita tidak bisa bersikap subjektif terhadap batu bara. Pertanyaannya adalah bagaimana kita dapat memanfaatkannya secara lebih berkelanjutan," ujarnya.

Pengiriman Batu Bara ke China Turun

Kedatangan batu bara melalui jalur kereta api ke pelabuhan-pelabuhan utama di China utara pada 6 Juli 2026 turun 18,63% dibandingkan hari sebelumnya.

Penurunan pasokan kereta mengindikasikan berkurangnya pengiriman dari wilayah tambang utama seperti Shanxi, Shaanxi, dan Inner Mongolia menuju pelabuhan ekspor domestik.

Apabila kedatangan kereta terus berada di bawah tingkat pemuatan kapal, stok batu bara di pelabuhan berpotensi turun. Kondisi ini biasanya menjadi faktor pendukung harga batu bara domestik China.

Namun apabila permintaan dari pembangkit listrik masih lesu, dampak terhadap harga cenderung terbatas.

Sebaliknya, pasar batu bara termal di area tambang China masih berada di bawah tekanan pada 6 Juli, karena belum ada perbaikan nyata pada fundamental permintaan dan pasokan. Persediaan batu bara di pembangkit listrik masih tinggi, sementara cuaca yang relatif tidak terlalu panas menahan konsumsi listrik.

Penyebab utama harga melemah adalah konsumsi batu bara di pembangkit listrik masih di bawah tahun lalu. Pada 3 Juli,...

The government is also trying to avoid the risk of power outages, especially when extreme heat waves increase energy consumption.

Rajnath Ram, an energy adviser at the Indian government's policy think tank NITI Aayog, said late last year that coal would remain a significant part of India's electricity system for the next two decades.

"We can't be subjective about coal. The question is how we can use it more sustainably," he said.

Coal Shipments to China Drop

Coal arrivals via rail to major ports in northern China on July 6, 2026, fell 18.63% compared to the previous day.

The decline in rail supply indicates reduced shipments from major mining regions such as Shanxi, Shaanxi and Inner Mongolia to domestic export ports.

If train arrivals continue to be below ship loading levels, coal stocks at ports have the potential to fall. This condition is usually a supporting factor for China's domestic coal prices.

However, if demand from power plants remains sluggish, the impact on prices tends to be limited.

In contrast, the thermal coal market in China's mining areas remained under pressure on July 6, as there has been no real improvement in demand and supply fundamentals. Coal inventories at power plants remain high, while relatively mild weather has restrained electricity consumption.

The main reason for the price decline is that coal consumption at power plants remains below last year's levels. As of July 3,...

Pada 3 Juli, konsumsi harian enam grup pembangkit listrik pesisir utama tercatat sekitar 786.300 ton, turun 7,3% dibandingkan periode yang sama tahun sebelumnya.

Produksi listrik tenaga air (PLTA) tetap tinggi akibat curah hujan yang melimpah di wilayah Sungai Yangtze. Selain itu, hujan yang dipicu sisa Topan Maysak di beberapa provinsi selatan turut meningkatkan pembangkitan listrik dari PLTA sehingga mengurangi kebutuhan pembangkit listrik tenaga batu bara.

Dengan stok batu bara yang tinggi, pembangkit listrik lebih memilih memenuhi kebutuhan melalui kontrak jangka panjang, sementara pembelian di pasar spot hanya dilakukan untuk kebutuhan mendesak. Industri kimia dan kokas juga hanya membeli sesuai kebutuhan karena margin keuntungan yang tipis. (mae/mae)

As of July 3, daily consumption by the six major coastal power generation groups was recorded at approximately 786,300 tons, down 7.3% compared to the same period last year.

Hydroelectric power (PLTA) production remains high due to abundant rainfall in the Yangtze River basin. Furthermore, rain triggered by the remnants of Typhoon Maysak in several southern provinces has also increased hydroelectric power generation, reducing the need for coal-fired power plants.

With high coal stocks, power plants prefer to meet their needs through long-term contracts, while spot market purchases are reserved for urgent needs. The chemical and coking industries also purchase only as needed due to thin profit margins. (mae/mae)



Kata Eramet Soal Revisi RKAB Nikel 2026 Milik Weda Bay Nickel

Azura Yumna Ramadani Purnama

ERAMET Indonesia mengungkapkan PT Weda Bay Nickel (WBN) terus berkoordinasi dan mengikuti arahan dari Kementerian Energi dan Sumber Daya Mineral (ESDM) terkait dengan proses revisi kuota produksi Rencana Kerja dan Anggaran Biaya (RKAB) 2026.

Perwakilan manajemen Eramet Indonesia menyatakan perseroan selaku pemegang saham minoritas di WBN bakal menghormati proses yang sedang berjalan dan berharap WBN mendapatkan kuota produksi yang memadai untuk menjaga keberlangsungan operasional.

Eramet's Comments on Weda Bay Nickel's 2026 Nickel RKAB Revision

Azura Yumna Ramadani Purnama

ERAMET Indonesia revealed that PT Weda Bay Nickel (WBN) continues to coordinate and follow the direction of the Ministry of Energy and Mineral Resources (ESDM) regarding the production quota revision process for the 2026 Work Plan and Budget (RKAB).

A management representative of Eramet Indonesia stated that the company, as a minority shareholder in WBN, will respect the ongoing process and hopes that WBN will receive an adequate production quota to maintain operational continuity.

"Penentuan kuota sepenuhnya merupakan kewenangan pemerintah. Eramet menghormati proses yang sedang berjalan dan berharap WBN memperoleh kuota yang memadai untuk menjaga keberlanjutan operasionalnya," kata perwakilan manajemen Eramet kepada *Bloomberg Technoz*, dikutip Senin (6/7/2026).

"Saat ini, proses tersebut berada dalam kewenangan pemerintah, dan Eramet akan terus memantau perkembangannya, tegasnya.

Dalam kesempatan sebelumnya, CEO Eramet Indonesia Jerome Baudlet mengungkapkan WBN membidik kuota produksi dalam RKAB 2026 dapat direvisi dari sebelumnya sebesar 12 juta ton, menjadi seperti angka tahun sebelumnya sekitar 42 juta ton.

Baudlet mengungkapkan revisi RKAB biasanya diajukan pada Juli setiap tahunnya. Jika disetujui, perusahaan bakal mendapatkan persetujuan RKAB pada rentang Juli hingga September.

Adapun kuota produksi bijih nikel dalam RKAB 2026 milik PT WBN yang disetujui Kementerian ESDM hanya disetujui sekitar 12 juta ton, dari kuota produksi tahun sebelumnya sebesar 42 juta ton.

"Jadi Weda Bay Nickel, maksud saya kami memproduksi 42 juta tahun lalu. Jadi jelas kami bisa meminta jumlah yang sama, tetapi ini ada di tangan pemerintah. Jadi kami menghormati keputusan mereka, kami hanya berharap mereka akan memberikan cukup bagi kami untuk mempertahankan operasi," kata Baudlet kepada awak media di sela Indonesia Critical Mineral Conference, Kamis (4/6/2026).

Baudlet mengungkapkan kapasitas produksi bijih tambang WBN mencapai 60 juta ton per tahun, sehingga perseroan menyanggupi memproduksi bijih hingga 42 juta ton pada tahun ini jika nantinya RKAB hasil revisi baru disetujui pada rentang Juli—September.

"Quota determination is entirely the government's responsibility. Eramet respects the ongoing process and hopes WBN will receive sufficient quota to maintain its operational sustainability," an Eramet management representative told *Bloomberg Technoz*, as quoted on Monday (July 6, 2026).

"Currently, the process is under the government's authority, and Eramet will continue to monitor its developments," he stressed.

Previously, Eramet Indonesia CEO Jerome Baudlet revealed that WBN is targeting a revised production quota in the 2026 Work Plan and Budget (RKAB) from the previous 12 million tons to the previous year's figure of around 42 million tons.

Baudlet explained that the revised RKAB is typically submitted in July each year. If approved, the company will receive RKAB approval between July and September.

The nickel ore production quota in PT WBN's 2026 RKAB, approved by the Ministry of ESDM, was only around 12 million tons, up from the previous year's production quota of 42 million tons.

"So, Weda Bay Nickel, I mean, we produced 42 million last year. So, obviously, we could ask for the same amount, but it's in the government's hands. So, we respect their decision; we just hope they'll give us enough to sustain operations," Baudlet told the media on the sidelines of the Indonesia Critical Mineral Conference on Thursday (June 4, 2026).

Baudlet revealed that WBN's ore production capacity reaches 60 million tons per year, so the company is capable of producing up to 42 million tons of ore this year if the revised RKAB is approved in the July-September period.

Di sisi lain, Baudalet mengungkapkan *smelter* nikel di IWIP berpotensi kekurangan bijih nikel sekitar 30 juta ton jika RKAB 2026 PT WBN tak disetujui.

Baudalet menjelaskan konsumsi bijih nikel untuk *smelter* nikel di kawasan IWIP pada 2025 mencapai 120 juta ton, dari besaran itu pada tahun lalu WBN memasok sekitar 42 juta ton bijih nikel.

Dengan begitu, dengan kuota produksi 2026 yang hanya disetujui 12 juta ton dan sudah habis, Baudalet memprediksi *smelter* nikel di kawasan IWIP bakal kekurangan bijih nikel hingga 30 juta ton.

"Jika kami tidak mendapatkan perpanjangan Anda tahu seperti yang saya sampaikan dalam presentasi, konsumsi bijih di area IWIP adalah 120 juta ton. Tahun lalu kami memasok 42 juta. Jika kami tidak mendapatkan perpanjangan, maka Anda akan mengalami defisit 30 juta ton dari Weda Bay Nickel," ungkap Baudalet.

Kementerian ESDM memangkas kuota kumulatif produksi bijih nikel dalam RKAB tahun ini di rentang 260 juta ton sampai 270 juta ton, terpelanting dari produksi dalam RKAB tahun lalu sebanyak 320 juta ton. Pemerintah bertujuan mengontrol harga komoditas tambang andalan RI tersebut.

Asosiasi Penambang Nikel Indonesia (APNI) menyebut Kementerian ESDM berencana merevisi kuota produksi bijih nikel dalam RKAB 2026 sesuai dengan kebutuhan industri domestik.

Dewan Penasihat Pertambangan APNI Djoko Widajatno menyatakan kuota produksi bijih nikel berencana disesuaikan Kementerian ESDM dengan mengacu pada kebutuhan industri dalam negeri, ketika periode revisi RKAB dimulai bulan ini.

Akan tetapi, Djoko juga belum bisa memastikan besaran tambahan kuota produksi yang bakal disetujui Kementerian ESDM dalam revisi RKAB tahun ini.

On the other hand, Baudalet revealed that the nickel *smelter* at IWIP could potentially face a nickel ore shortage of around 30 million tons if PT WBN's 2026 RKAB is not approved.

Baudalet explained that nickel ore consumption for nickel *smelters* in the IWIP area will reach 120 million tons by 2025. Of that figure, WBN supplied around 42 million tons of nickel ore last year.

Thus, with the 2026 production quota of only 12 million tons approved and already exhausted, Baudalet predicts that nickel *smelters* in the IWIP area will have a nickel ore shortage of up to 30 million tons.

"If we don't get an extension, as I mentioned in the presentation, ore consumption in the IWIP area is 120 million tons. Last year, we supplied 42 million tons. If we don't get an extension, we'll have a 30 million ton deficit from Weda Bay Nickel," Baudalet said.

The Ministry of ESDM has cut the cumulative nickel ore production quota in this year's RKAB (Regional Work Plan and Budget) to 260 million to 270 million tons, down from last year's RKAB production of 320 million tons. The government aims to boost the price of Indonesia's mainstay mining commodity.

The Indonesian Nickel Miners Association (APNI) stated that the Ministry of ESDM plans to revise the nickel ore production quota in the 2026 Work Plan and Budget (RKAB) to reflect domestic industry needs.

APNI Mining Advisory Board Member Djoko Widajatno stated that the Ministry of ESDM plans to adjust the nickel ore production quota, referring to domestic industrial needs, when the RKAB revision period begins this month.

However, Djoko could not yet confirm the amount of additional production quota that would be approved by the Ministry of Energy and Mineral Resources in this year's RKAB revision.

"Kuota produksi akan disesuaikan dengan kebutuhan dalam negeri, sehingga kita sempat membangun Industri," kata Djoko ketika dihubungi, Rabu (1/7/2026).

Weda Bay Nickel telah beroperasi sejak 2019 melalui izin usaha pertambangan khusus (IUPK), dan akan beroperasi hingga 2069.

Perusahaan ini dioperasikan oleh Thingshan Group, perusahaan asal China yang memiliki porsi 51,2% saham, Eramet (asal Prancis) 37,8%, dan sisanya dimiliki oleh perusahaan pelat merah Indonesia, PT Aneka Tambang (Persero) Tbk. (ANTM) atau Antam dengan porsi 10%. (azr/wdh)

"The production quota will be adjusted to meet domestic needs, so we have time to build industry," Djoko said when contacted on Wednesday (July 1, 2026).

Weda Bay Nickel has been operating since 2019 through a special mining business permit (IUPK), and will operate until 2069.

The company is operated by Thingshan Group, a Chinese company with a 51.2% stake, Eramet (France) with a 37.8% stake, and the remaining 10% is held by Indonesian state-owned company PT Aneka Tambang (Persero) Tbk. (ANTM), also known as Antam. (azr/wdh)



Harga Patokan Baru, Penambang Mengaku Sulit Jual Nikel ke Smelter

Azura Yumna Ramadani Purnama

ASOSIASI Penambang Nikel Indonesia (APNI) mengungkapkan harga patokan mineral (HPM) bijih nikel yang baru membuat penambang sulit menjual bijih ke *smelter* domestik.

Anggota Dewan Penasihat Pertambangan APNI Djoko Widajatno mengungkapkan banyak *smelter* yang ingin membeli bijih nikel di bawah HPM yang berlaku, padahal nilai transaksi tersebut menjadi acuan penambang dalam melakukan transaksi dan memenuhi kewajiban pembayaran royalti.

"Banyak *smelter* yang tidak membeli [sesuai dengan harga] resmi HPM, sedangkan penambang tidak diperbolehkan menjual di bawah HPM yang menjadi acuan transaksi dan royalti," kata Djoko ketika dihubungi, Senin (6/7/2026).

Miners Say New Benchmark Price Makes It Difficult to Sell Nickel to Smelters

Azura Yumna Ramadani Purnama

THE **INDONESIAN** Nickel Miners Association (APNI) revealed that the new mineral benchmark price (HPM) for nickel ore makes it difficult for miners to sell ore to domestic *smelters*.

APNI Mining Advisory Board Member Djoko Widajatno revealed that many *smelters* want to buy nickel ore below the applicable HPM, even though the transaction value is a reference for miners in conducting transactions and fulfilling royalty payment obligations.

"Many *smelters* do not buy at the official HPM, while miners are not allowed to sell below the HPM, which is the benchmark for transactions and royalties," Djoko said when contacted on Monday (6/7/2026).

Dia menilai *smelter* nikel juga mencari peluang untuk memanfaatkan bijih nikel murah, sehingga margin keuntungan mereka cukup besar.

Banyak Broker

Djoko juga menyoroti peran broker dalam proses transaksi bijih antara penambang dengan *smelter*. Dia menilai banyak broker yang mendapatkan keuntungan dengan memanfaatkan kelemahan penambang.

Bagaimanapun, dia menegaskan HPM merupakan instrumen pengaturan harga dasar mineral yang diregulasi pemerintah. Instrumen tersebut juga menjadi acuan dalam penentuan pendapatan negara, terutamanya royalti.

"Sejak awal memang hubungan *smelter* dengan penambang tidak pernah mesra. Pasar di *smelter* sebenarnya besar, tetapi adanya broker di sekitar perusahaan yang memperoleh manfaat dengan memanfaatkan kelemahan penambang," tutur Djoko.

Shanghai Metals Market (SMM) memperkirakan HPM baru untuk bijih nikel berkadar 1,2% akan naik signifikan menjadi US\$40,18/ton basah atau *wet metric ton* (wmt) alias lebih tinggi 151% dibandingkan dengan HPM lama yang berada di sekitar US\$16—US\$17 per wmt.

Saat ini, SMM mencatat harga rata-rata bijih tersebut sekitar US\$30,5/wmt.

Alasannya, untuk bijih nikel kadar rendah, mineral ikutan seperti kobalt dan kromium turut dihitung jika mengacu HPM baru. Sementara itu, bijih nikel kadar tinggi, bakal turut mempertimbangkan besi dan kromium.

Selain itu, *corrective factor* (CF) nikel yang mengakomodasi nilai diskon maupun premium terhadap kualitas bijih juga mengalami kenaikan.

He believes that nickel *smelters* are also looking for opportunities to exploit cheap nickel ore, so that their profit margins are quite large.

Many Brokers

Djoko also highlighted the role of brokers in ore transactions between miners and *smelters*. He believes many brokers profit by exploiting miners' weaknesses.

However, he emphasized that the HPM is a government-regulated instrument for setting the floor price for minerals. This instrument also serves as a reference for determining state revenue, particularly royalties.

"From the start, the relationship between *smelters* and miners has never been cordial. The *smelter* market is actually large, but there are brokers around the companies who profit by exploiting the miners' weaknesses," said Djoko.

Shanghai Metals Market (SMM) estimates that the new HPM for 1.2% nickel ore will increase significantly to US\$40.18/wet *metric ton* (wmt), or 151% higher than the old HPM which was around US\$16-US\$17 per wmt.

Currently, SMM records an average price of the ore of around US\$30.5/wmt.

The reason is that for low-grade nickel ore, associated minerals such as cobalt and chromium are included in the new HPM calculation. Meanwhile, for high-grade nickel ore, iron and chromium will also be considered.

In addition, the nickel *corrective factor* (CF), which accommodates discounts and premiums based on ore quality, also increased.

Perhitungan tersebut dihitung dengan asumsi kadar air sebesar 35%—40%, kadar kobalt sekitar 0,07%, kadar besi 25%, dan kadar kromium 3%.

Sementara itu, HPM bijih nikel saprolit atau dengan kadar nikel sekitar 1,5% diprediksi bakal berada di level US\$ 57,13/wmt atau masih berada dibawah rata-rata harga bijih saprolit yang tercatat sebesar US\$70,7/wmt.

Akan tetapi, SMM menilai dengan adanya kenaikan biaya pajak yang didorong oleh kenaikan harga HPM, maka harga absolut bijih nikel saprolit dapat naik menjadi US\$72,47/wmt setelah HPM baru berlaku.

Adapun, Kementerian Energi dan Sumber Daya Mineral (ESDM) resmi mengubah HPM untuk penjualan komoditas mineral logam, termasuk bijih nikel dan bijih bauksit.

Aturan tersebut tertuang di dalam Keputusan Menteri (Kepmen) ESDM No. 144/2026 tentang Perubahan atas Kepmen ESDM 268.K/MB.01/MEM.B/2025 tentang Pedoman Penetapan Harga Patokan untuk Penjualan Komoditas Mineral Logam dan Batu Bara. Aturan itu berlaku efektif mulai 15 April 2026.

Dalam aturan terbaru tersebut, formula HPM bijih nikel tidak lagi hanya mengacu pada kadar nikel, melainkan turut mempertimbangkan kandungan mineral ikutan seperti besi (Fe), kobalt (Co), dan krom (Cr), serta faktor kadar air atau *moisture content*.

Dijelaskan bahwa kontribusi unsur tambahan hanya dihitung jika memenuhi ambang batas tertentu, seperti kadar besi minimal 35% dan kobalt minimal 0,05%.

Sementara itu, faktor koreksi atau CF juga ditetapkan berbeda untuk masing-masing komoditas, yakni 30% untuk nikel, besi, dan kobalt, serta 10% untuk krom.

The calculation is based on the assumption of a water content of 35%—40%, a cobalt content of around 0.07%, an iron content of 25%, and a chromium content of 3%.

Meanwhile, the HPM for saprolite nickel ore, or with a nickel content of around 1.5%, is predicted to be at US\$57.13/wmt, or still below the average price of saprolite ore recorded at US\$70.7/wmt.

However, SMM assesses that with the increase in tax costs driven by the increase in HPM prices, the absolute price of saprolite nickel ore could rise to US\$72.47/wmt after the new HPM comes into effect.

Meanwhile, the Ministry of Energy and Mineral Resources (ESDM) has officially changed the HPM for the sale of metal mineral commodities, including nickel ore and bauxite ore.

The regulation is stipulated in Ministerial Decree (Kepmen ESDM) No. 144/2026 concerning Amendments to Ministerial Decree (Kepmen ESDM) No. 268.K/MB.01/MEM.B/2025 concerning Guidelines for Determining Benchmark Prices for the Sale of Metal Mineral and Coal Commodities. The regulation is effective from April 15, 2026.

In the latest regulation, the HPM formula for nickel ore no longer only refers to nickel content, but also takes into account the content of associated minerals such as iron (Fe), cobalt (Co), and chromium (Cr), as well as the water content factor or *moisture content*.

It is explained that the contribution of additional elements is only calculated if it meets certain thresholds, such as a minimum iron content of 35% and a minimum cobalt content of 0.05%.

Meanwhile, the correction factor or CF is also set differently for each commodity, namely 30% for nickel, iron, and cobalt, and 10% for chrome.

Selain itu, penggunaan satuan juga berubah dari sebelumnya US\$/dmt menjadi US\$/wmt.

Sebelumnya dalam Kepmen ESDM No. 268 Tahun 2025, perhitungan HPM bijih nikel hanya didasarkan pada kadar nikel (%Ni), *corrective factor* (CF), dan harga mineral acuan (HMA) nikel.

Sekadar informasi, APNI mencatat Harga Mineral Acuan (HMA) nikel untuk periode kedua Juni sebesar US\$18.799/wmt atau mengalami penurunan dibandingkan periode pertama Juni 2026 sebesar US\$ 18.642/wmt.

Harga bijih nikel dengan *moisture content* atau kadar air 30% dengan basis *free on board* (FOB) per wmt dengan

kadar 1,1% ditetapkan sebesar US\$ 48,83/wmt,

kadar 1,2% US\$53,66/wmt,

kadar 1,3% US\$58,75/wmt,

kadar 1,4% US\$64,10/wmt,

kadar 1,5% US\$69,71/wmt,

kadar 1,6% US\$75,58/wmt,

kadar 1,7% US\$81,72/wmt, dan

kadar 1,8% US\$88,11/wmt.

Sementara itu, untuk skema kadar air 35% dengan basis FOB per wmt, harga bijih nikel

kadar 1,1% ditetapkan sebesar US\$ 45,34/wmt,

kadar 1,2% US\$49,83/wmt,

kadar 1,3% US\$54,55/wmt,

kadar 1,4% US\$59,52/wmt,

kadar 1,5% US\$64,73/wmt,

kadar 1,6% US\$70,19/wmt,

kadar 1,7% US\$75,88/wmt, dan

kadar 1,8% US\$81,82/wmt. (azr/wdh)

In addition, the use of units has also changed from US\$/dmt to US\$/wmt.

Previously, in ESDM Ministerial Decree No. 268 of 2025, the calculation of HPM for nickel ore was only based on nickel content (%Ni), *corrective factor* (CF), and nickel reference mineral price (HMA).

For your information, APNI recorded the Reference Mineral Price (HMA) for nickel for the second period of June at US\$ 18,799/wmt, a decrease compared to the first period in June 2026 of US\$18,642/wmt.

The price of nickel ore with *moisture content* or water content of 30% on a *free on board* (FOB) basis per wmt with

a grade of 1.1% is set at US\$48.83/wmt,

1.2% grade US\$53.66/wmt,

1.3% grade US\$58.75/wmt,

1.4% grade US\$64.10/wmt,

1.5% grade US\$69.71/wmt,

1.6% rate US\$75.58/wmt,

1.7% rate US\$81.72/wmt, and

1.8% rate US\$88.11/wmt.

Meanwhile, for the 35% moisture content scheme on an FOB per wmt basis, the price of

1.1% nickel ore is set at US\$45.34/wmt,

1.2% grade US\$49.83/wmt,

1.3% grade US\$54.55/wmt,

1.4% grade US\$59.52/wmt,

1.5% grade US\$64.73/wmt,

1.6% grade US\$70.19/wmt,

1.7% grade US\$75.88/wmt, and

1.8% grade US\$81.82/wmt. (azr/wdh)



RI Impor 6 Juta Ton Bijih Nikel Filipina hingga Mei, Naik 116%

Azura Yumna Ramadani Purnama

INDONESIA tercatat telah mengimpor sekitar 6,02 juta ton bijih nikel dari Filipina sepanjang Januari hingga Mei 2026, naik 116,8% secara *year on year* (yoy) dari periode yang sama tahun lalu sebanyak 2,78 juta ton.

Berdasarkan data Badan Pusat Statistik (BPS), volume impor bijih nikel dan konsentrat (*ore nickel and concentrates*) dengan kode HS 26040000 sepanjang Januari—Mei 2026 tercatat terbesar ke wilayah Weda, Maluku Utara dengan volume sekitar 3,69 juta ton.

Kemudian, impor bijih nikel dari Filipina yang masuk ke Morowali tercatat sekitar 852.651 ton pada Januari hingga Mei 2026.

Selain itu, bijih nikel impor dari Filipina sebanyak 817.751 ton tercatat masuk wilayah Kendari pada Januari—Mei 2026.

Selanjutnya, bijih nikel dari Filipina sepanjang Januari—Mei 2026 sejumlah 656.551 ton masuk ke wilayah Kolonodale.

Forum Industri Nikel Indonesia (FINI) sebelumnya memperkirakan impor bijih atau ore nikel akan mencapai 25 juta ton sepanjang 2026. Angka ini lebih tinggi dibandingkan dengan impor sepanjang 2025 lalu sejumlah 15,33 juta ton.

"Kurang lebih 25 juta [ton] untuk tahun ini impornya [bijih nikel]. Hitungan kami," ungkap Ketua FINI Arif Perdana Kusumah kepada awak media dalam agenda Indonesia Critical Minerals Conference & Expo 2026, awal Juni.

Indonesia Imports 6 Million Tons of Philippine Nickel Ore Through May, Up 116%

Azura Yumna Ramadani Purnama

INDONESIA is recorded to have imported around 6.02 million tons of nickel ore from the Philippines from January to May 2026, a 116.8% *year-on-year* (yoy) increase from 2.78 million tons in the same period last year.

Based on data from the Central Statistics Agency (BPS), the largest import volume of nickel ore and concentrates *with* HS code 26040000 during January-May 2026 was recorded to the Weda region, North Maluku with a volume of around 3.69 million tons.

Furthermore, nickel ore imports from the Philippines into Morowali were recorded at around 852,651 tons from January to May 2026.

In addition, 817,751 tons of imported nickel ore from the Philippines were recorded as entering the Kendari region in January—May 2026.

Furthermore, nickel ore from the Philippines during January—May 2026 amounting to 656,551 tons entered the Kolonodale area.

The Indonesian Nickel Industry Forum (FINI) previously estimated that nickel ore imports would reach 25 million tons throughout 2026. This figure is higher than the 15.33 million tons imported throughout 2025.

"This year's nickel ore imports are approximately 25 million tons. That's our estimate," FINI Chairman Arif Perdana Kusumah told the media at the Indonesia Critical Minerals Conference & Expo 2026 in early June.

Arif menambahkan hingga Mei 2026, FINI mencatat Indonesia telah mengimpor lebih dari 5 juta ton bijih dari Filipina.

Menurutnya, peningkatan impor bijih tahun ini masih dipengaruhi keputusan Kementerian Energi dan Sumber Daya Mineral (ESDM) memangkas kuota kumulatif produksi bijih nikel dalam Rencana Kerja dan Anggaran Biaya (RKAB) tahun ini di rentang 260 juta ton sampai 270 juta ton, lebih rendah dari produksi dalam RKAB tahun lalu sebanyak 320 juta ton.

Arif juga menyebut memprediksi impor Filipina sepanjang 2026 adalah sebesar 30 juta ton. Namun, hingga semester pertama tahun ini, FINI mencatat adanya *smelter* yang memutuskan memangkas utilisasi mereka yang ujungnya berpengaruh pada penyerapan bahan baku bijih.

"Kalau menghitung saat ini kan sudah ada yang utilitasnya turun, jadi ada penurunan produksi, sehingga angkanya [impor bijih nikelnya] pasti berubah," tambahnya.

Di sisi lain, FINI juga melihat kemampuan Filipina untuk memasok bahan baku. Menurutnya para penambang nikel Filipina juga memiliki kontrak eksisting yang harus mereka penuhi, selain kepada Indonesia.

"Kapasitas mereka [Filipina] juga kan tidak terlalu besar. Kemudian mereka juga punya punya perjanjian jual-beli dengan negara lainnya seperti China," ungkapnya.

FINI sebelumnya menjelaskan kapasitas produksi fasilitas pengolahan dan pemurnian atau *smelter* nikel di Indonesia pada tahun ini akan mencapai 2,7 juta ton kering atau *dry metric ton* (dmt) nikel kelas 1 dan kelas 2.

Dengan kapasitas ini, Indonesia membutuhkan tambahan sekitar 40—50 juta ton basah atau *wet metric ton* (wmt) bijih saprolit dan limonit pada 2026 dari besaran tahun lalu sekitar 300 juta dmt.

Arif added that as of May 2026, FINI recorded that Indonesia had imported more than 5 million tons of ore from the Philippines.

According to him, the increase in ore imports this year is still influenced by the decision of the Ministry of Energy and Mineral Resources (ESDM) to cut the cumulative quota for nickel ore production in this year's Work Plan and Budget (RKAB) to a range of 260 million tons to 270 million tons, lower than the production in last year's RKAB of 320 million tons.

Arif also predicted that Philippine imports would reach 30 million tons throughout 2026. However, as of the first half of this year, FINI noted that some *smelters* had decided to cut their utilization, ultimately impacting the absorption of raw ore.

"If we calculate it now, there's already a decline in utilization, so there's a decrease in production, so the figure [for nickel ore imports] will definitely change," he added.

On the other hand, FINI also assesses the Philippines' ability to supply raw materials. According to him, Philippine nickel miners also have existing contracts they must fulfill, in addition to those with Indonesia.

"Their [the Philippines'] capacity isn't that large. They also have sales agreements with other countries like China," he said.

FINI previously explained that the production capacity of nickel processing and refining facilities or *smelters* in Indonesia this year will reach 2.7 million *dry metric tons* (dmt) of class 1 and class 2 nickel.

With this capacity, Indonesia will need an additional 40-50 million *wet metric tons* (wmt) of saprolite and limonite ore by 2026, up from last year's figure of around 300 million dmt.

Dengan demikian, bijih nikel yang dibutuhkan sepanjang tahun ini berpotensi naik menjadi 340—350 juta ton.

Direktur Jenderal Mineral dan Batu Bara (Dirjen Minerba) Kementerian ESDM Tri Winarno menyanggah kabar bahwa kuota RKAB nikel 2026 bakal dinaikkan menjadi 360 juta ton.

"Kementerian ESDM belum pernah menyatakan itu," ujar Tri ketika dihubungi Bloomberg Technoz, Rabu (24/6/2026). (azr/wdh)

Thus, the nickel ore needed throughout this year has the potential to increase to 340-350 million tons.

The Director General of Minerals and Coal (Dirjen Minerba) of the Ministry of ESDM, Tri Winarno, denied reports that the 2026 nickel RKAB quota would be increased to 360 million tons.

"The Ministry of ESDM has never stated that," Tri said when contacted by Bloomberg Technoz on Wednesday (June 24, 2026). (azr/wdh)



ESDM Lelang 76.742 Ton Batu Bara Sitaan di Kaltim Senilai Rp21 M

Azura Yumna Ramadani Purnama

KEMENTERIAN Energi dan Sumber Daya Mineral (ESDM) melalui Direktorat Jenderal Penegakan Hukum (Ditjen Gakkum) melelang batu bara dengan tonase 76.742 metrik ton sitaan atau barang yang dikuasai negara, seharga limit Rp20,9 miliar.

Berdasarkan pengumuman lelang Ditjen Gakkum, batu bara yang dilelang tersebar di 11 titik *stockpile* yang tersebar di Samarinda dan Kabupaten Kutai Kartanegara, Kalimantan Timur.

Adapun, lelang dilakukan secara daring dengan nilai limit Rp20,9 miliar. Peserta lelang diwajibkan menyetorkan uang jaminan Rp10,45 miliar atau sekitar 50% dari nilai limit.

Ditjen Gakkum Kementerian ESDM menetapkan penawaran akhir lelang pada Rabu (8/7/2026), pukul 09.00 WIB.

Ministry of ESDM Auctions 76,742 Tons of Confiscated Coal in East Kalimantan, Valued at IDR 21 Billion

Azura Yumna Ramadani Purnama

THE MINISTRY of Energy and Mineral Resources (ESDM), through the Directorate General of Law Enforcement (Ditjen Gakkum), is auctioning 76,742 metric tons of confiscated coal, or goods controlled by the state, for a limit of IDR 20.9 billion.

Based on the auction announcement from the Directorate General of Law Enforcement, the coal being auctioned is spread across 11 *stockpile* points in Samarinda and Kutai Kartanegara Regency, East Kalimantan.

The auction was conducted online with a limit of Rp20.9 billion. Bidders were required to deposit a security deposit of Rp10.45 billion, or approximately 50% of the limit.

The Directorate General of Law Enforcement at the Ministry of Energy and Mineral Resources set the final auction bid on Wednesday (8/7/2026), at 09.00 WIB.

"Direktorat Jenderal Penegakan Hukum Energi dan Sumber Daya Mineral Kementerian ESDM membuka lelang barang yang dikuasai negara komoditas batu bara. Batas akhir penawaran Rabu, 8 Juli 2026, Pukul 09.00 WIB," tulis Ditjen Gakkum ESDM dalam pengumuman resminya.

Ditjen Gakkum Kementerian ESDM menetapkan lelang tersebut hanya dapat diikuti oleh pemegang izin usaha pertambangan (IUP), termasuk pemegang izin usaha pertambangan khusus (IUPK), perjanjian karya perusahaan pertambangan batubara (PKP2B), dan IUP lainnya.

Lalu, pemegang izin pengangkutan dan penjualan (IPP) untuk komoditas batu bara dan pelaku usaha sebagai pengguna akhir batu bara di dalam negeri.

Sementara itu, kualitas batu bara yang dilelang memiliki berbagai spesifikasi, dengan nilai kalor (GAR) berkisar antara 4.564—5.961 kcal/kg.

Lelang Sebelumnya

Ditjen Gakkum Kementerian ESDM sebelumnya bakal kembali melelang barang yang dikuasai negara berupa *stockpile* dengan komoditas bauksit lebih dari 629.000 metrik ton di Kepulauan Riau.

Lelang tahap kedua tersebut dijadwalkan dibuka pada Februari 2026. Adapun, komoditas tersebut awalnya dilelang pada 16—22 Desember 2025. Namun, hingga akhir masa penawaran, tidak terdapat pihak yang mengikuti lelang tersebut.

"Bauksit kita lelang karena waktunya sudah di ujung akhir tahun. *Enggak* ada penawaran, kita tunda. Nanti kita akan *release* lagi," kata Direktur Jenderal Penegakan Hukum Kementerian ESDM Jeffri Huwae di Kompleks Parlemen, medio Januari.

"The Directorate General of Law Enforcement for Energy and Mineral Resources at the Ministry of ESDM is opening an auction for state-controlled coal commodities. The bidding deadline is Wednesday, July 8, 2026, at 9:00 a.m. Western Indonesian Time," the Directorate General of Law Enforcement for Energy and Mineral Resources (ESDM) wrote in its official announcement.

The Directorate General of Law Enforcement at the Ministry of Energy and Mineral Resources has stipulated that the auction can only be attended by holders of mining business permits (IUP), including holders of special mining business permits (IUPK), coal mining work agreements (PKP2B), and other IUPs.

Then, holders of transportation and sales permits (IPP) for coal commodities and business actors as end users of coal domestically.

Meanwhile, the quality of the auctioned coal has various specifications, with a calorific value (GAR) ranging from 4,564—5,961 kcal/kg.

Previous Auctions

The Directorate General of Law Enforcement at the Ministry of Energy and Mineral Resources (ESDM) will once again auction off state-controlled stockpiles of bauxite in the Riau Islands.

The second phase of the auction is scheduled to open in February 2026. The commodity was initially auctioned on December 16-22, 2025. However, by the end of the bidding period, no parties had participated in the auction.

"We're auctioning the bauxite because it's almost the end of the year. There were *no* bids, so we're postponing it. We'll *release it* again later," said Jeffri Huwae, Director General of Law Enforcement at the Ministry of ESDM, at the Parliament Complex in mid-January.

Jeffri mengklaim sebenarnya terdapat satu pihak yang tertarik mengikuti lelang bauksit tersebut, tetapi akhirnya batal negara masa pembukaan lelang sudah berakhir dan memasuki periode libur akhir tahun.

“Ada satu penawaran *cuma* karena harus penyetoran DP, pada Jumat waktu habis bank *enggak* buka, akhirnya tertunda untuk tahun depan [2026],” klaim dia.

Dia memastikan saat ini Ditjen Gakum ESDM sedang mengurus dokumen penawaran kembali 629.000 ton bauksit tersebut, sehingga lelang tahap dua bakal dibuka pada Februari 2026.

“Kita akan *release* lagi, mudah-mudahan dalam waktu dekat. Sekarang lagi di proses pemenuhan syaratnya, paling bulan depan. Bulan ini kita mesti persiapan tutup pada Januari,” ujar Jeffri.

Sebelumnya, Jeffri mengungkapkan lelang bauksit tersebut berkontribusi menambah penerimaan negara lebih dari Rp200 miliar.

Dia menyatakan lelang tersebut merupakan tindak lanjut atas amanat Pasal 199J Peraturan Pemerintah No. 39/2025 tentang Pelaksanaan Kegiatan Usaha Pertambangan Mineral dan Batubara.

“Apabila kembali ditemukan *stockpile* mineral, baik bauksit, batu bara, nikel, maupun komoditas lainnya, akan dilakukan penegakan hukum dengan menetapkan barang tersebut sebagai Barang yang Dikuasai Negara untuk kemudian dilelang. Hasil lelang akan menjadi PNBPN sektor ESDM,” kata Jeffri dalam keterangan tertulis, Selasa (16/12/2025).

Dia mengklaim lelang tersebut memberikan kepastian hukum terhadap barang yang dikuasai negara dari sisa hasil aktivitas usaha pertambangan. (azr/wdh)

Jeffri claimed that there was actually one party interested in participating in the bauxite auction, but ultimately cancelled because the auction opening period had ended and it was entering the year-end holiday period.

“There was one offer , *but because it had to be paid a down payment, the bank wasn't open on Friday* , so it was postponed until next year [2026],” he claimed.

He confirmed that the Directorate General of Legal Enforcement of the Ministry of ESDM is currently processing the re-bidding documents for the 629,000 tons of bauxite, so that the second phase of the auction will open in February 2026.

“We'll *release* another one, hopefully soon. We're currently in the process of fulfilling the requirements, and it will be next month at the latest. This month, we have to prepare to close in January,” said Jeffri.

Previously, Jeffri revealed that the bauxite auction contributed to increasing state revenue by more than IDR 200 billion.

He stated that the auction was a follow-up to the mandate of Article 199J of Government Regulation No. 39/2025 concerning the Implementation of Mineral and Coal Mining Business Activities.

“If further mineral *stockpiles*, whether bauxite, coal, nickel, or other commodities, are discovered, law enforcement will be carried out by designating these assets as State-Controlled Goods, which will then be auctioned. The proceeds will become non-tax state revenue (PNBP) for the energy and mineral resources sector,” Jeffri said in a written statement on Tuesday (December 16, 2025).

He claimed the auction provided legal certainty for state-controlled assets derived from the remaining proceeds of mining activities. (azr/wdh)



Menkeu Perketat Pengawasan Ekspor Batu Bara Lewat KMK Baru

Yurika

MENTERI Keuangan Purbaya Yudhi Sadewa menerbitkan aturan baru pengawasan ekspor batu bara. Aturan itu tertuang dalam Keputusan Menteri Keuangan (KMK) Nomor 31/MK/BC/2026 yang berlaku efektif 1 Juni 2026.

Melalui KMK tersebut, Direktorat Jenderal Bea dan Cukai DJBC mendapat dasar hukum untuk mengawasi pembatasan ekspor batu bara sesuai Permendag Nomor 15 Tahun 2026.

Bea Cukai kini wajib memeriksa dua dokumen utama sebelum komoditas dilepas ekspor, yakni status Eksportir Terdaftar ET Batu bara atau Surat Keterangan, serta Laporan Surveyor LS.

Kewajiban itu berlaku untuk seluruh jenis batu bara yang masuk lartas, mulai antrasit, batu bara bahan bakar, lignit, hingga gambut dalam berbagai bentuk.

Pengawasan DJBC tidak terbatas pada ekspor langsung ke luar negeri. Aturan baru juga mencakup pengeluaran barang dari Tempat Penimbunan Berikat TPB, Kawasan Ekonomi Khusus KEK, dan Kawasan Perdagangan Bebas KPBPB yang ditujukan ke luar daerah pabean.

Sebagai bagian dari penataan, KMK 31/2026 mencabut ketentuan lama dalam KMK Nomor 24/MK/BC/2026 yang masih mengacu Permendag 23/2023. Dengan demikian, seluruh mekanisme pembatasan ekspor batu bara kini sepenuhnya merujuk pada Permendag 15/2026. (RA)

Finance Minister Tightens Coal Export Supervision Through New KMK

Yurika

FINANCE Minister Purbaya Yudhi Sadewa issued new regulations on coal export supervision. These regulations are outlined in Ministerial Decree (KMK) No. 31/MK/BC/2026, which will take effect on June 1, 2026.

Through the KMK, the Directorate General of Customs and Excise DJBC obtained a legal basis to oversee coal export restrictions in accordance with Minister of Trade Regulation Number 15 of 2026.

Customs is now required to check two main documents before commodities are exported: the Registered Exporter status of Coal ET or Certificate, and the LS Surveyor Report.

This obligation applies to all types of coal included in the lartas, from anthracite, fuel coal, lignite, to peat in various forms.

DJBC's oversight is not limited to direct exports abroad. The new regulations also cover the release of goods from Bonded Warehouses (TPB), Special Economic Zones (SEZs), and Free Trade Zones (KPPBB) destined for outside the customs area.

As part of the restructuring, Ministerial Decree No. 31/2026 revokes the old provisions in Ministerial Decree No. 24/MK/BC/2026, which still referred to Ministerial Regulation No. 23/2023. Therefore, all coal export restriction mechanisms now fully refer to Ministerial Regulation No. 15/2026. (RA)



PT TIMAH Tingkatkan Kepatuhan Mitra Usaha

IQPlus (BCA Sekuritas)

PT TIMAH (Persero) Tbk terus memperkuat tata kelola perusahaan melalui peningkatan kepatuhan dan standarisasi bagi perusahaan jasa pertambangan yang menjadi mitra usaha. Upaya tersebut diwujudkan dengan menggelar Bimbingan Teknis Pedoman Pelaksanaan Aspek Standarisasi Usaha Jasa Pertambangan di Grand Hatika Hotel, Tanjung Pandan, Belitung, pada Kamis (2/7/2026)

Kegiatan ini diikuti puluhan direktur perusahaan jasa pertambangan, mitra usaha tambang, serta Penanggung Jawab Operasional (PJO) yang bekerja di wilayah Izin Usaha Pertambangan (IUP) PT TIMAH dengan menghadirkan narasumber Sub Koordinator Usaha Jasa Mineral dan Batubara Kementerian Energi dan Sumber Daya Mineral (ESDM), Sari Taqwiem Ashra.

Bimbingan teknis tersebut menjadi bagian dari komitmen perusahaan dalam memperkuat tata kelola operasional pertambangan melalui penerapan kaidah teknik pertambangan yang baik (Good Mining Practices), peningkatan kepatuhan terhadap regulasi, serta penguatan budaya keselamatan kerja dan perlindungan lingkungan.

Direktur Operasi PT TIMAH (Persero) Tbk, Handy Geniardi, mengatakan penguatan tata kelola perusahaan tidak dapat dipisahkan dari kepatuhan seluruh mitra usaha terhadap standar dan regulasi yang berlaku.

Menurutnya, terdapat lima fokus utama yang menjadi pembahasan dalam kegiatan tersebut, yakni peningkatan kepatuhan terhadap regulasi dan kaidah teknik pertambangan yang baik,...

PT TIMAH Improves Business Partner Compliance

IQPlus (BCA Sekuritas)

PT TIMAH (Persero) Tbk continues to strengthen corporate governance by improving compliance and standardization for its mining services partners. This effort was realized through a Technical Guidance on Guidelines for Implementing Standardization Aspects of Mining Services Businesses at the Grand Hatika Hotel in Tanjung Pandan, Belitung, on Thursday (July 2, 2026).

This activity was attended by dozens of directors of mining service companies, mining business partners, and Operational Persons (PJO) who work in the Mining Business Permit (IUP) area of PT TIMAH, with the presence of a resource person, the Sub-Coordinator of Mineral and Coal Service Business of the Ministry of Energy and Mineral Resources (ESDM), Sari Taqwiem Ashra.

The technical guidance is part of the company's commitment to strengthening mining operational governance through the implementation of good mining techniques (Good Mining Practices), increasing compliance with regulations, and strengthening the culture of occupational safety and environmental protection.

PT TIMAH (Persero) Tbk's Director of Operations, Handy Geniardi, said that strengthening corporate governance cannot be separated from the compliance of all business partners with applicable standards and regulations.

According to him, there are five main focuses that will be discussed in the activity, namely increasing compliance with regulations and good mining engineering principles,...

yakni peningkatan kepatuhan terhadap regulasi dan kaidah teknik pertambangan yang baik, penguatan kolaborasi kemitraan yang produktif, pemahaman kewajiban perusahaan jasa pertambangan, implementasi standarisasi dan evaluasi teknis di lapangan, serta peningkatan kompetensi peserta sebagai agen perubahan.

"Kelima aspek tersebut merupakan fondasi penting dalam membangun tata kelola pertambangan yang lebih baik, sehingga setiap kegiatan operasional dapat berjalan sesuai ketentuan, aman, dan memberikan nilai tambah bagi perusahaan maupun para mitra usaha," ujar Handy.

Ia menegaskan bahwa produktivitas perusahaan harus berjalan seiring dengan penerapan standar keselamatan kerja, kepatuhan hukum, dan perlindungan lingkungan.

Menurut Hendi, kolaborasi yang kuat antara PT TIMAH dan mitra usaha menjadi salah satu faktor penting dalam mewujudkan perusahaan tambang timah yang berdaya saing global.

"Mari kita jadikan PT TIMAH sebagai perusahaan tambang timah kelas dunia yang tidak hanya unggul dari sisi bisnis, tetapi juga memiliki tata kelola yang baik, menjunjung tinggi keselamatan kerja, serta peduli terhadap kelestarian lingkungan. Kolaborasi yang efektif adalah kunci, regulasi menjadi pedoman, dan komitmen menjadi landasan dalam setiap aktivitas pertambangan," katanya.

Sementara itu, Sub Koordinator Usaha Jasa Mineral dan Batubara Kementerian Energi dan Sumber Daya Mineral (ESDM), Sari Taqwiem Ashra, mengapresiasi langkah PT TIMAH yang secara aktif melakukan pembinaan kepada perusahaan jasa pertambangan.

Menurutnya, masih terdapat mitra usaha yang belum memahami secara menyeluruh berbagai regulasi maupun kewajiban yang harus dipenuhi dalam menjalankan kegiatan pertambangan.

namely increasing compliance with regulations and good mining engineering principles, strengthening productive partnership collaboration, understanding the obligations of mining service companies, implementing standardization and technical evaluation in the field, and increasing the competence of participants as agents of change.

"These five aspects are an important foundation for building better mining governance, so that every operational activity can run according to regulations, safely, and provide added value for the company and its business partners," said Handy.

He emphasized that company productivity must go hand in hand with the implementation of occupational safety standards, legal compliance, and environmental protection.

According to Hendi, strong collaboration between PT TIMAH and its business partners is an important factor in realizing a globally competitive tin mining company.

"Let's make PT TIMAH a world-class tin mining company that excels not only in business but also has good governance, upholds occupational safety, and cares about environmental sustainability. Effective collaboration is key, regulations are the guideline, and commitment is the foundation of every mining activity," he said.

Meanwhile, the Sub-Coordinator of Mineral and Coal Services Business at the Ministry of Energy and Mineral Resources (ESDM), Sari Taqwiem Ashra, appreciated PT TIMAH's steps in actively providing guidance to mining services companies.

According to him, there are still business partners who do not fully understand the various regulations and obligations that must be fulfilled in carrying out mining activities.

"Kegiatan ini sangat penting agar perusahaan jasa pertambangan memahami seluruh ketentuan yang diterbitkan pemerintah maupun kebijakan yang diterapkan PT TIMAH. Kepatuhan terhadap regulasi merupakan bagian penting dalam membangun tata kelola pertambangan yang baik," ujarnya. (end)

"This activity is crucial for ensuring mining service companies understand all government regulations and the policies implemented by PT TIMAH. Compliance with regulations is a crucial part of building good mining governance," he said. (end)



Di Tengah Fluktuasi Harga Komoditas, Sektor Tambang Tetap Jadi Penopang Ekonomi RI

Tim Redaksi

KINERJA ekonomi Indonesia menunjukkan tren yang positif tercermin dari laporan Badan Pusat Statistik (BPS) yang mencatat ekonomi nasional tumbuh 5,61 persen secara tahunan (year-on-year) pada kuartal I-2026.

Pada periode tersebut, Produk Domestik Bruto (PDB) atas dasar harga berlaku mencapai Rp6.187,2 triliun, sedangkan PDB atas dasar harga konstan tahun 2010 tercatat sebesar Rp3.447,7 triliun.

Di tengah pertumbuhan tersebut, sektor pertambangan tetap memainkan peran strategis, tidak hanya dari sisi produksi, tetapi juga sebagai penopang penerimaan negara, ekspor, ketahanan energi, serta penciptaan lapangan kerja di berbagai daerah.

Selain itu berdasarkan data BPS menunjukkan nilai ekspor Indonesia sepanjang Januari hingga April 2026 mencapai 92,15 miliar dolar AS, meningkat 5,48 persen dibandingkan periode yang sama tahun sebelumnya.

Amid Fluctuating Commodity Prices, the Mining Sector Remains a Mainstay of the Indonesian Economy

Editorial Team

INDONESIA's economic performance is showing a positive trend, as reflected in a report by the Central Statistics Agency (BPS), which recorded national economic growth of 5.61 percent year-on-year in the first quarter of 2026.

During that period, Gross Domestic Product (GDP) at current prices reached Rp6,187.2 trillion, while GDP at constant prices in 2010 was recorded at Rp3,447.7 trillion.

Amidst this growth, the mining sector continues to play a strategic role, not only in terms of production, but also as a pillar of state revenue, exports, energy security, and job creation in various regions.

Furthermore, BPS data shows that Indonesia's export value from January to April 2026 reached US\$92.15 billion, an increase of 5.48 percent compared to the same period the previous year.

Dari sisi fiskal, Kementerian Energi dan Sumber Daya Mineral (ESDM) melaporkan realisasi Penerimaan Negara Bukan Pajak (PNBP) tahun 2025 mencapai Rp138,37 triliun, atau setara 108,56 persen dari target DIPA 2025 sebesar Rp127,44 triliun.

Adapun PNBP dari sektor sumber daya alam mineral dan batu bara menjadi penyumbang terbesar dengan realisasi mencapai 104,38 persen dari target yang ditetapkan.

Komisaris PT Andalan Artha Primanusa, Ivan Victor Salim, menilai capaian tersebut memberikan sinyal positif bagi prospek sektor pertambangan pada paruh kedua 2026.

"Capaian penerimaan sektor ESDM memberi sinyal positif bagi paruh kedua 2026. Di tengah harga komoditas yang bergerak, tambang masih mampu menjaga kontribusi fiskal dan aktivitas ekonomi di daerah," ujarnya dalam keterangannya, dikutip Senin, 6 Juli.

Menurutnya, realisasi penerimaan yang melampaui target menjadi landasan bagi pemerintah maupun pelaku usaha untuk mempertahankan keberlanjutan aktivitas di sektor pertambangan.

Ia menambahkan di wilayah operasional tambang, kegiatan produksi menciptakan rantai ekonomi yang luas, mulai dari pembukaan lahan, pengupasan tanah, pengangkutan material, pemeliharaan jalan tambang, hingga pengoperasian dan perawatan alat berat.

Adapun, aktivitas tersebut tidak hanya melibatkan pemegang izin usaha pertambangan, tetapi juga berbagai perusahaan jasa pendukung.

From the fiscal side, the Ministry of Energy and Mineral Resources (ESDM) reported that the realization of Non-Tax State Revenue (PNBP) in 2025 reached IDR 138.37 trillion, or equivalent to 108.56 percent of the 2025 DIPA target of IDR 127.44 trillion.

Meanwhile, PNBP from the mineral and coal natural resources sector was the largest contributor, with realization reaching 104.38 percent of the set target.

PT Andalan Artha Primanusa Commissioner Ivan Victor Salim assessed that this achievement provides a positive signal for the mining sector's prospects in the second half of 2026.

"The ESDM sector's revenue performance provides a positive signal for the second half of 2026. Amid fluctuating commodity prices, mining is still able to maintain fiscal contributions and economic activity in the regions," he said in a statement, quoted on Monday, July 6.

According to him, the realization of revenue exceeding the target is the basis for the government and business actors to maintain the sustainability of activities in the mining sector.

He added that in mining operational areas, production activities create a broad economic chain, starting from land clearing, stripping, material transportation, mine road maintenance, to the operation and maintenance of heavy equipment.

Meanwhile, these activities not only involve mining business permit holders, but also various supporting service companies.


Ivan menjelaskan bahwa operasional pertambangan sangat bergantung pada keberadaan kontraktor, operator alat berat, penyedia jasa transportasi, perusahaan pemeliharaan infrastruktur, hingga pengawas keselamatan kerja.

Menurutnya seiring meningkatnya skala produksi, kebutuhan terhadap penyedia jasa yang mampu bekerja secara efisien, tepat waktu, dan memenuhi standar keselamatan juga akan semakin besar.

"Pertumbuhan tambang membutuhkan ekosistem pendukung yang kuat. Perusahaan jasa yang mampu menjaga efisiensi, keselamatan, dan ketepatan operasi akan semakin dibutuhkan ketika kegiatan produksi tetap berjalan," tuturnya.

Memasuki pertengahan 2026, sektor pertambangan masih menjadi salah satu penggerak utama perekonomian nasional melalui kontribusinya terhadap pertumbuhan ekonomi, ekspor, penerimaan negara, serta aktivitas ekonomi di daerah.

Namun demikian, ia menambahkan keberlanjutan kontribusi tersebut memerlukan tata kelola yang disiplin dan dukungan ekosistem industri yang profesional.

Menurutnya kehadiran perusahaan jasa pendukung yang profesional akan menjadi faktor penting untuk menjaga produktivitas sektor pertambangan sekaligus memastikan kegiatan operasional tetap berjalan secara efisien, aman, dan berkelanjutan. 


Ivan explained that mining operations are highly dependent on the presence of contractors, heavy equipment operators, transportation service providers, infrastructure maintenance companies, and occupational safety supervisors.

He said that as production scales increase, the need for service providers who can work efficiently, on time, and meet safety standards will also increase.

"Mining growth requires a strong supporting ecosystem. Service companies capable of maintaining operational efficiency, safety, and precision will be increasingly needed as production continues," he said.

Entering mid-2026, the mining sector remains a key driver of the national economy through its contribution to economic growth, exports, state revenues, and regional economic activity.

However, he added that the sustainability of this contribution requires disciplined governance and the support of a professional industrial ecosystem.

He believes the presence of professional support services companies will be a crucial factor in maintaining the productivity of the mining sector while ensuring operational activities continue to run efficiently, safely, and sustainably. 



PTBA Keruk 1,56 Ton Sampah dari Sungai Enim

Posted by Prismono

PEKERJA tambang mengeruk tanah sudah biasa dan merupakan pekerjaan sehari-hari. Namun jika mereka mengeruk sampah dari sungai, luar biasa dan jarang terjadi.

Hal inilah yang dilakukan para pekerja PT Bukit Asam (Persero) Tbk (PTBA) dalam rangka memperingati Hari Lingkungan Hidup Sedunia (HLHS) 2026. Kegiatan pengumpulan sampah tersebut dilakukan saat mereka menyusuri sungai Enim di Tanjung Enim, Kabupaten Muara Enim, Sumatera Selatan, Sabtu (20/6).

Kegiatan bertitel Susur Sungai dan Bersih Sampah tersebut diselenggarakan sebagai wujud nyata komitmen PTBA dalam menjaga kelestarian lingkungan. Melalui kegiatan ini, PTBA terus memperkuat komitmennya untuk mendukung pembangunan berkelanjutan dengan menghadirkan berbagai program yang memberikan manfaat bagi lingkungan dan masyarakat.

Tanjung Enim Mining Site General Manager PTBA, Satria Wirawan, mengatakan melalui kegiatan ini, pihaknya ingin menunjukkan bahwa kepedulian terhadap lingkungan harus diwujudkan melalui aksi nyata. Apalagi, menjaga kebersihan sungai merupakan langkah sederhana yang memberikan dampak besar bagi keberlanjutan lingkungan.

Satria menjelaskan, kegiatan diawali dengan susur Sungai Enim dari titik belakang eks Rumah Makan Kartika hingga Jembatan Kuning Klawas. Selanjutnya,...

PTBA Dredges 1.56 Tons of Waste from the Enim River

Posted by Prismono

MINERS dredging the ground is a common and everyday occurrence. However, dredging up trash from rivers is an extraordinary and rare occurrence.

This is what the workers of PT Bukit Asam (Persero) Tbk (PTBA) did in order to commemorate World Environment Day (HLHS) 2026. The waste collection activity was carried out when they went along the Enim River in Tanjung Enim, Muara Enim Regency, South Sumatra, Saturday (20/6).

The River Tour and Waste Cleanup activities were held as a concrete manifestation of PTBA's commitment to environmental preservation. Through these activities, PTBA continues to strengthen its commitment to supporting sustainable development by presenting various programs that benefit the environment and the community.

PTBA's Tanjung Enim Mining Site General Manager, Satria Wirawan, said that through this activity, his company wants to demonstrate that environmental awareness must be demonstrated through concrete actions. Furthermore, maintaining river cleanliness is a simple step that can have a significant impact on environmental sustainability.

Satria explained that the activity began with a tour of the Enim River from the back of the former Kartika Restaurant to the Yellow Klawas Bridge. Furthermore,...


Selanjutnya, para peserta melaksanakan aksi bersih sampah di sepanjang bantaran Sungai Enim, kawasan Taman Love Bukit Asam, hingga area Masjid Jami Bukit Asam. Dari kegiatan tersebut berhasil dikumpulkan sebanyak 1,56 ton sampah yang berasal dari area pesisir sungai, permukaan Sungai Enim, kawasan Taman Love, dan berbagai fasilitas umum di sekitarnya.

Selain membersihkan lingkungan, PTBA juga melakukan pelepasan 300 ekor benih ikan gurame dan 1.000 ekor benih ikan patin ke sungai Enim. Aksi ini sebagai upaya mendukung kelestarian ekosistem perairan dan menjaga keseimbangan biodiversitas sungai.

Menurut Satria, sungai yang bersih akan menjaga kualitas lingkungan, mengurangi pencemaran, melindungi ekosistem, sekaligus memberikan manfaat bagi masyarakat.

"Kami berharap semangat menjaga lingkungan tidak berhenti pada peringatan HLHS, tetapi menjadi budaya yang terus dilakukan bersama melalui kolaborasi antara perusahaan, pemerintah, komunitas, dan masyarakat," tuturnya.

Aksi kolaboratif ini melibatkan berbagai pihak, di antaranya Basarnas Sumatera Selatan, Dinas Lingkungan Hidup Kabupaten Muara Enim, Forkopimcam Lawang Kidul, BPBD Kabupaten Muara Enim, Dinas Pemadam Kebakaran Kabupaten Muara Enim, pemerintah desa, mitra kerja PTBA, komunitas pecinta alam dan lingkungan, serta masyarakat.

"Kolaborasi ini mencerminkan semangat gotong royong dalam menjaga kelestarian lingkungan sekaligus meningkatkan kesadaran masyarakat akan pentingnya menjaga kebersihan sungai sebagai sumber kehidupan," ujar Satria. 


Furthermore, the participants carried out a trash cleanup along the Enim Riverbanks, the Bukit Asam Love Park area, and the Bukit Asam Grand Mosque area. The activity collected 1.56 tons of trash from the riverbank, the surface of the Enim River, the Love Park area, and various surrounding public facilities.

In addition to cleaning up the environment, PTBA also released 300 gourami and 1,000 patin fish fry into the Enim River. This initiative supports the preservation of the aquatic ecosystem and maintains the balance of the river's biodiversity.

According to Satria, clean rivers will maintain environmental quality, reduce pollution, protect ecosystems, and provide benefits to the community.

"We hope that the spirit of protecting the environment will not stop with the HLHS commemoration, but will become a culture that is continuously carried out together through collaboration between companies, the government, communities, and the public," he said.

This collaborative action involved various parties, including Basarnas South Sumatra, the Muara Enim Regency Environmental Service, the Lawang Kidul Forkopimcam, the Muara Enim Regency BPBD, the Muara Enim Regency Fire Department, village governments, PTBA partners, nature and environmental lover communities, and the community.

"This collaboration reflects the spirit of mutual cooperation in preserving the environment while raising public awareness of the importance of maintaining the cleanliness of rivers as a source of life," said Satria. 

JAKARTAGLOBE.ID

Thousands of Indonesian Coal Workers Face Layoffs as Mining Permits Stall

Fuad Iqbal Abdullah

MORE than 15,000 workers at coal mining companies in East Kalimantan province face potential layoffs as the government has yet to process the extension of 26 mining permits that have been pending for six months, workers' representatives said.

The uncertainty has forced several mining companies in Kutai Kartanegara Regency to halt operations, raising fears of wider job losses in one of Indonesia's largest coal-producing regions.

Workers say companies could classify the prolonged permit delays as a force majeure event, allowing them to terminate employees without severance pay if operations cannot resume.

"The permit applications have not progressed until now, and the impact is enormous," Gendut Supriyanto, coordinator representing employees of companies affected by the 26 mining business permits (IUPs), told *Beritasatu.com* on Monday.

According to Gendut, approximately 15,080 employees are directly affected because mining activities have been suspended while companies await permit renewals.

The layoffs have already begun. As of June, five mining companies whose permits remain pending had dismissed about 1,070 workers, he said.

Workers are urging the government to expedite the permit renewal process to prevent further layoffs and limit the economic impact on communities that rely heavily on the mining industry, particularly around Indonesia's new capital, Nusantara, in East Kalimantan.


The warning comes as Indonesia considers reducing its coal production target to around 600 million metric tons in 2026, down from a record 790 million tons produced in 2025, although government officials have recently indicated the final production quota remains under review.

Indonesia is one of the world's largest thermal coal exporters, with East Kalimantan serving as the country's main production hub. The province accounts for roughly 55% of national coal output, producing more than 436 million metric tons annually, while the island of Kalimantan contributes more than 80% of Indonesia's total coal production.

The latest concerns also add to anxieties over the labor market in Southeast Asia's largest economy. Manpower Ministry data show more than 88,000 workers lost their jobs in 2025, while another 23,470 workers were laid off between January and May 2026. Between 2020 and 2025, nearly 706,000 workers were affected by layoffs nationwide.

In response to mounting job losses, President Prabowo Subianto's administration has established a Layoff Mitigation Task Force after labor unions warned that as many as 150,000 jobs could be at risk across several industries, including approximately 55,000 positions in the ceramic sector.

State Secretary Prasetyo Hadi, who heads the task force, said the government, parliament, and labor unions are mapping companies facing financial distress to identify measures that could prevent further layoffs.

"We are identifying which companies face problems and what those problems are so that mitigation measures can be taken," Prasetyo said after meeting lawmakers and labor representatives in late June. 

MINING.COM

Lynas, South Korean magnet maker sign deal for Malaysia factory

Reuters

LYNAS Rare Earths said on Tuesday it has signed a partnership deal with South Korea's JS Link to develop a magnet factory in Malaysia.

The Australian rare-earths producer will also supply rare-earth materials to JS Link's magnet factory in South Korea and the planned factory in Malaysia until January 2038.

The partnership follows a magnet manufacturing deal between the two companies last year.


Under the latest deal, JS Link will establish a magnet factory in Kuantan, Malaysia, with an operating capacity of 3,000 tonnes per annum of neodymium-iron-boron (NdFeB) permanent sintered magnets. Lynas said it will invest around A\$50 million (\$34.78 million) in JS Link shares to support the development of the facility.

The produced magnets will supply automotive, wind energy and electronics manufacturing supply chains in key markets including Korea and Malaysia, Lynas added.

The company expects the Kuantan magnet factory to create up to 400 new jobs.

Meanwhile, Malaysia said on Monday it would review a \$96 million rare-earths supply deal signed earlier this year between Lynas, the operator of one of the world's largest rare earths processing plants located in the Southeast Asian country, and the U.S. Department of Defense.

The four-year deal has faced protests, with some rights groups accusing Lynas of supplying materials for U.S.-made weapons used by Israel in its war against Hamas in Gaza.

Muslim-majority Malaysia has long been supportive of the Palestinian cause and does not have diplomatic ties with Israel. 



Thiess sets production ‘world record’ for Liebherr R 9600 excavator at Mount Pleasant

International Mining

THIESS says it has set a world record for the highest material moved in a 12-month period by a Liebherr R 9600 excavator, achieving 17 million bank cubic meters across 6,840 operating hours at MACH Energy’s Mount Pleasant Operation in the Hunter Valley, New South Wales, Australia.

This result builds on a record monthly production benchmark established after the excavator went to work on July 1, 2025, demonstrating Thiess’ ability to sustain exceptional performance over time.

Thiess Group Executive Australia East, Rae O’Brien, said: “The result reflects the capability and collaboration of teams across operations, maintenance, technical services and planning. Achieving a world record of this scale requires consistent execution over time.

“It highlights the value of strong partnerships, disciplined planning and a relentless focus on performance, as well as the capability of our people and fleet, in delivering for our client.”

The result was driven by high utilisation, sustained machine hours and a strong focus on productivity. Teams worked together to minimise downtime, optimise fleet performance and maintain consistent output over a 12-month period.


The maintenance team ensured fleet reliability, the technical services team provided the planning and “pathing” for the operation and the operations team optimised dig sequences and haulage, enabling sustained high-volume production.

This performance was delivered alongside a strong safety record, with the team also achieving 745 days LTI-free, reinforcing our commitment to both safe and productive outcomes.

Thiess Mount Pleasant Operation Project Manager, Ryan Fox, said: “The achievement was built on disciplined execution. We challenged ourselves to have a ‘be better’ mindset every day, looking for ways to work smarter, safer and more efficiently. The commitment to continuous improvement was key to achieving this result.

“The team’s ability to move this volume shows how seriously we take our motto: manage the minutes, because minutes matter and seconds count.

“We strive for optimal performance every shift, and this result shows what our people and machines can achieve together.”

This result reinforces Thiess’ ability to deliver safe, productive and reliable mining outcomes while setting a new global benchmark. 



LME aluminium cash price rises 0.60% to \$3,079.5/t on July 3 as stocks decline further

Edited By : Aranya Mondal

LME aluminium prices moved up across cash and three-month contracts on July 3, while exchange opening stocks declined from the previous trading day. Forward prices also strengthened, with live warrants remaining unchanged and cancelled warrants falling.

The LME aluminium cash bid price stood at USD 3,079.5 per tonne on July 3, up 0.60 per cent from USD 3,061 per tonne on July 2. The cash offer price also increased by 0.60 per cent to USD 3,080 per tonne from USD 3,061.5 per tonne.

Similarly, the LME aluminium three-month bid price rose by 0.70 per cent to USD 3,086 per tonne on July 3 from USD 3,064.5 per tonne on July 2. The three-month offer price increased by 0.72 per cent to USD 3,087 per tonne from USD 3,065 per tonne.

For the December 2027 contract, the bid price stood at USD 3,022 per tonne on July 3, up 0.40 per cent from USD 3,010 per tonne on July 2. The December 2027 offer price also increased by 0.40 per cent to USD 3,027 per tonne from USD 3,015 per tonne.

The LME aluminium three-month Asian Reference Price stood at USD 3,090.5 per tonne on July 3.

On the inventory front, LME aluminium opening stocks declined by 0.50 per cent to 300,275 tonnes on July 3 from 301,775 tonnes on July 2. Live warrants remained unchanged at 246,600 tonnes on both days.

Cancelled warrants fell by 2.79 per cent to 52,175 tonnes on July 3 from 53,675 tonnes on July 2.

Meanwhile, the LME alumina Platts price stood at USD 330 per tonne. 

THE ECONOMIC TIMES

Gold down as markets await Fed meeting minutes for policy direction

By Reuters

GOLD prices fell on Tuesday, trading below a two-week high hit in the previous session, as investors looked ahead to the release of the U.S. Federal Reserve's June meeting minutes for insight into new Chair Kevin Warsh's monetary policy direction.

Spot gold fell 0.4% to \$4,148.59 per ounce by 0043 GMT, while U.S. gold futures for August delivery eased 0.2% to \$4,160.20.

The Federal Open Market Committee's June 16-17 meeting minutes will be released on Wednesday.

Forward guidance can be a "valuable tool" that speeds the impact of monetary policy under the right circumstances, though it can be a problem when used inflexibly, Fed Governor Christopher Waller said on Monday.

U.S. services sector activity dipped in June as some of the boost from businesses rushing to place orders amid the Middle East war ebbed, but employment rebounded after contracting for three straight months, pointing to continued labor market stability.

Gold prices have retreated more than 25% from record highs reached earlier this year, as the U.S.-Israel war with Iran stoked inflation concerns, boosted the dollar and reinforced expectations of interest rate hikes this year.


However, bullion hit a two-week high on Monday as the U.S.-Iran ceasefire deal eased some of those inflation concerns and last week's weaker-than-expected U.S. jobs data prompted markets to dial back expectations for a near-term interest rate hike.

Traders now see about a 57% chance of a rate increase in September, down from more than 60% before the data, according to the CME FedWatch tool.

Lower rates make zero-yield bullion more attractive for investors.

Citi has become the fifth bank to clear transactions in London's over-the-counter gold market, the world's largest bullion trading centre, in a major expansion of its precious metals business, the bank said on Monday.

Perth Mint's gold product sales hit a two-month high in June, up 53% from May, while silver sales declined 19% from May, the refiner said on Tuesday.

Elsewhere, spot silver slipped 0.8% to \$61.57 per ounce, platinum eased 0.8% to \$1,618.78 and palladium fell 0.4% to \$1,264.11. 



Congo sees no major threat from Middle East crisis to copper, cobalt output

By Reuters

DEMOCRATIC Republic of Congo does not expect significant disruptions to copper and cobalt production this year due to chemical supply constraints stemming from conflict in the Middle East, a senior mining official told Reuters.

The US-Iran conflict that broke out on February 28 and has largely drawn to a halt after last month's interim peace treaty, has disrupted sulphuric acid supplies, an essential input for copper and cobalt production.

Zambia, a major supplier to Congo, has curbed sulphuric acid exports to prioritise domestic users, prompting some Congolese miners to assess potential output reductions after record first-quarter exports, Reuters previously reported.

The world's top cobalt producer and second-largest copper miner exported 823 887 metric tons of copper in the quarter, up 4.8% from a year earlier, official data showed.

Cobalt hydroxide exports soared 24.5% to 51 940 t, or about 17 054 t of cobalt metal, in the quarter, while gold exports totalled 6.3 t, valued at \$732-million.

"At this stage, we have not observed any major impact on national production related to the supply of mining inputs," said Grace Mabaya, a senior official in the Mines Ministry.

The outlook for the rest of 2026 remains broadly positive, supported by strong copper demand and stable mining operations, Mabaya said, adding that most miners have long-term supply contracts, maintain strategic inventories or source chemicals from regional suppliers, limiting the risk of major production losses.

Still, he would not rule out higher costs and longer delivery times if disruptions persist.

Congo's cobalt exports are increasingly shaped by government quotas and export controls, according to Mabaya, as Congo pushes reforms to exert greater influence over the market.

China's CMOC remained the largest exporter during the first quarter, while Glencore was also a major contributor to copper and cobalt shipments. 