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TINS Rogoh Rp33,19 Miliar Genjot Eksplorasi Timah

Penulis : Desyinta Nuraini

P**T Timah Tbk.** (TINS) menggelontorkan dana senilai Rp33,19 miliar untuk mendukung kegiatan eksplorasi perseroan sepanjang triwulan III/2026.

Division Head Corporate Secretary Timah Ruddy Nursalam mengungkapkan bahwa kegiatan eksplorasi perseroan pada periode Juli–September 2026 masih berfokus penuh pada komoditas timah.

"Jumlah biaya yang dikeluarkan total sebesar Rp33,2 miliar dengan perincian biaya operasional sebesar Rp21,6 miliar dan biaya investasi sebesar Rp11,6 miliar," papar Ruddy dalam laporannya di keterbukaan informasi, Senin (12/10/2026).

Perseroan menegaskan bahwa eksplorasi di wilayah laut selama triwulan III/2026 hanya mencakup kegiatan survei batimetri di Perairan Bangka. Pada periode ini, emiten pertambangan pelat merah tersebut belum melakukan kegiatan pengeboran, baik untuk eksplorasi maupun pengeboran pandu di area lepas pantai.

Sementara itu, untuk eksplorasi darat, TINS secara intensif melakukan berbagai aktivitas operasional yang meliputi pemetaan, survei geofisika ground magnetic dan geolistrik, serta pengeboran eksplorasi timah primer dan aluvial di wilayah Pulau Bangka dan Belitung. Total kedalaman pengeboran darat yang berhasil direalisasikan mencapai 11.666 meter.

Memasuki triwulan IV/2026, perseroan berencana melakukan evaluasi menyeluruh sekaligus melanjutkan program kerja eksplorasi dari periode sebelumnya.

TINS Spends Rp33.19 Billion to Boost Tin Exploration

Author: Desyinta Nuraini

P**T TIMAH TBK.** (TINS) disbursed Rp33.19 billion to support the company's exploration activities throughout the third quarter of 2026.

Timah's Division Head Corporate Secretary, Ruddy Nursalam, revealed that the company's exploration activities for the July–September 2026 period are still fully focused on tin commodities.

"The total costs incurred amounted to Rp33.2 billion, with operational costs amounting to Rp21.6 billion and investment costs amounting to Rp11.6 billion," Ruddy explained in his report in the information disclosure on Monday (12/10/2026).

The company confirmed that its offshore exploration activities during the third quarter of 2026 only included bathymetric surveys in Bangka waters. During this period, the state-owned mining company did not conduct any drilling activities, either exploration or pilot drilling, in offshore areas.

Meanwhile, for onshore exploration, TINS is intensively conducting various operational activities, including mapping, ground magnetic and geoelectric geophysical surveys, and primary and alluvial tin exploration drilling in the Bangka and Belitung Islands. The total onshore drilling depth achieved reached 11,666 meters.

Entering the fourth quarter of 2026, the company plans to conduct a comprehensive evaluation and continue its exploration work program from the previous period.

Untuk kegiatan pengeboran di laut, TINS mengalokasikan 1 unit Kapal Bor dan 4 unit Ponton Bor yang akan difokuskan di wilayah perairan Bangka dan Kundur.

Adapun untuk eksplorasi darat di Pulau Bangka dan Pulau Belitung, agenda kegiatan akan difokuskan pada pengeboran eksplorasi dan pengeboran pandu (primer & aluvial), lanjutan survei geofisika ground magnetic dan geolistrik di Belitung, serta survei topografi di kedua pulau tersebut.

Direktur Utama TINS Restu Widiyantoro sebelumnya mengungkapkan produksi bijih timah di Belitung yang sebelumnya hanya sekitar 1.000-1.200 ton per tahun melonjak hampir 10 kali lipat menjadi sekitar 10.000 ton setelah kebocoran pertambangan berhasil ditekan melalui kegiatan penertiban.

Restu mengatakan peningkatan tersebut terjadi setelah kegiatan penertiban yang dilakukan bersama sejumlah satuan tugas membantu menekan kebocoran produksi timah di wilayah tersebut.

"Yang tadinya produksi rata-rata setahun hanya 1.000 atau 1.200 ton, itu bisa mencapai 10.000 ton. Jadi hampir 10 kali lipat karena kebocoran bisa tertutup," katanya dalam rapat dengar pendapat (RDP) dengan Komisi XII DPR RI, Selasa (15/9/2026).

Namun, lonjakan produksi tersebut tidak diimbangi dengan kuota rencana kerja dan anggaran biaya (RKAB) yang diperoleh PT Timah untuk wilayah Belitung.

Menurutnya, PT Timah semula hanya memperoleh alokasi RKAB sekitar 3.000 ton untuk 2026. Kuota tersebut kemudian habis hanya dalam waktu sekitar 2,5 bulan, sedangkan aktivitas penambangan masyarakat masih terus berlangsung.
Editor : Aprianto Cahyo Nugroho

For drilling activities at sea, TINS allocated 1 Drilling Vessel unit and 4 Drilling Pontoon units which will be focused on the waters of Bangka and Kundur.

As for land exploration on Bangka Island and Belitung Island, the activity agenda will focus on exploration drilling and pilot drilling (primary & alluvial), continued ground magnetic and geoelectric geophysical surveys in Belitung, as well as topographic surveys on both islands.

TINS President Director Restu Widiyantoro previously revealed that tin ore production in Belitung, which was previously only around 1,000-1,200 tons per year, has jumped almost tenfold to around 10,000 tons after mining leaks were successfully suppressed through regulatory activities.

Restu said the increase occurred after regulatory activities carried out in collaboration with several task forces helped suppress tin production leaks in the region.

"Previously, the average annual production was only 1,000 or 1,200 tons, but now it can reach 10,000 tons. So, it's almost tenfold because the leaks can be plugged," he said in a hearing with Commission XII of the Indonesian House of Representatives (DPR RI) on Tuesday (September 15, 2026).

However, the surge in production was not matched by the work plan and budget (RKAB) quota obtained by PT Timah for the Belitung region.

According to him, PT Timah initially only received an RKAB allocation of around 3,000 tons for 2026. This quota was then exhausted in just about 2.5 months, while community mining activities continued.
Editor: Aprianto Cahyo Nugroho

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Bumi Resources (BUMI) Buka Suara Soal Rumor Akuisisi Kideco milik INDY

Penulis : Annisa Kurniasari Saumi

PT BUMI Resources Tbk. (BUMI) buka suara terkait rumor yang menyebutkan perseroan menjadi salah satu kandidat terkuat untuk melakukan akuisisi PT Kideco Jaya Agung (KJA) milik PT Indika Energy Tbk. (INDY).

Direktur Bumi Resources RA Sri Dharmayanti menjelaskan karena pemberitaan yang beredar didasarkan pada narasumber yang tidak disebutkan identitasnya. Dengan demikian, perseroan tidak dapat memverifikasi sumber maupun dasar informasinya.

"Perseroan tidak dapat memberikan komentar atas rumor pasar, spekulasi, maupun transaksi yang bersifat hipotesis, serta setiap perkembangan korporasi yang material akan diungkapkan sesuai dengan peraturan dan ketentuan keterbukaan informasi yang berlaku," ujar Dharmayanti, Senin (12/10/2026).

Menurutnya, pokok tanggapan tersebut turut dimuat dalam artikel yang dimaksud. Dia juga menuturkan tanggapan tersebut sejalan dengan penerapan tata kelola perusahaan yang baik dan praktik keterbukaan informasi yang mendukung terciptanya pasar modal yang teratur wajar, dan efisien.

Dharmayanti juga menuturkan perseroan dalam berbagai kesempatan telah menyampaikan arah strategisnya, yaitu diversifikasi usaha ke luar batu bara termal.

"Adapun aset yang disebutkan dalam pemberitaan merupakan aset batu bara termal," tutur Dharmayanti.

Bumi Resources (BUMI) Speaks Out on Rumors of Acquiring INDY's Kideco

Author: Annisa Kurniasari Saumi

PT BUMI Resources Tbk. (BUMI) has spoken out about rumors that the company is one of the strongest candidates to acquire PT Kideco Jaya Agung (KJA), owned by PT Indika Energy Tbk. (INDY).

Bumi Resources Director RA Sri Dharmayanti explained that because the circulating news was based on an anonymous source, the company was unable to verify the source or basis of the information.

"The company cannot comment on market rumors, speculation, or hypothetical transactions, and any material corporate developments will be disclosed in accordance with applicable information disclosure regulations and provisions," Dharmayanti said on Monday (12/10/2026).

According to him, the main points of the response were also included in the article in question. He also stated that the response aligns with the implementation of good corporate governance and information disclosure practices that support the creation of an orderly, fair, and efficient capital market.

Dharmayanti also said that the company has conveyed its strategic direction on various occasions, namely business diversification outside of thermal coal.

"The assets mentioned in the news are thermal coal assets," said Dharmayanti.

Sebagai informasi, Kideco menjadi salah satu pendorong pertumbuhan pendapatan INDY terbesar sampai semester I/2026.

INDY mencetak pendapatan yang meningkat 19,9% dibandingkan periode yang sama tahun sebelumnya menjadi US\$1,14 miliar, dari US\$ 956,8 juta.

Pertumbuhan pendapatan terutama didorong oleh kontribusi yang lebih tinggi dari Kideco Jaya Agung (Kideco), Tripatra, Interport Mandiri Utama (Interport), dan Indika Indonesia Resources.

Pendapatan Kideco meningkat 10,2% menjadi US\$855,1 juta, didukung kenaikan harga jual rata-rata sebesar 6,8% menjadi US\$54,7 per ton dan kenaikan volume penjualan sebesar 2,4% menjadi 14,8 juta ton.

Kideco menjual 6,4 juta ton atau 43,5% dari volume penjualannya untuk pasar domestik dan 8,3 juta ton atau 56,5% untuk pasar ekspor. ➡

For your information, Kideco is one of INDY's biggest revenue growth drivers until the first half of 2026.

INDY posted revenues that increased 19.9% compared to the same period the previous year to US\$1.14 billion, from US\$956.8 million.

Revenue growth was primarily driven by higher contributions from Kideco Jaya Agung (Kideco), Tripatra, Interport Mandiri Utama (Interport), and Indika Indonesia Resources.

Kideco's revenue increased 10.2% to US\$855.1 million, supported by a 6.8% increase in average selling prices to US\$54.7 per tonne and a 2.4% increase in sales volume to 14.8 million tonnes.

Kideco sold 6.4 million tons or 43.5% of its sales volume for the domestic market and 8.3 million tons or 56.5% for the export market. ➡

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PTBA Tengah Ajukan Usulan RKAB 2027 ke Kementerian ESDM

Reporter: Arif Ferdianto | Editor: Ignatia Maria Sri Sayekti

PT BUKIT Asam Tbk (PTBA) menyatakan saat ini sedang memproses pengajuan usulan Rencana Kerja dan Anggaran Biaya (RKAB) untuk periode tahun 2027 kepada Kementerian ESDM.

Langkah ini dilakukan di tengah upaya pemerintah yang terus meningkatkan efisiensi dan perbaikan proses persetujuan RKAB pertambangan nasional.

Emiten tambang batubara pelat merah tersebut menegaskan komitmennya untuk tetap menjaga kinerja operasional yang solid hingga akhir tahun ini.

PTBA Submitting 2027 RKAB Proposal to the Ministry of ESDM

Reporter: Arif Ferdianto | Editor: Ignatia Maria Sri Sayekti

PT BUKIT Asam Tbk (PTBA) stated that it is currently processing the submission of the proposed Work Plan and Budget (RKAB) for the 2027 period to the Ministry of ESDM.

This step was taken amidst the government's efforts to continuously increase efficiency and improve the national mining RKAB approval process.

The state-owned coal mining company reaffirmed its commitment to maintaining solid operational performance through the end of this year.

PTBA mencatat kinerja produksi dan penjualan perusahaan masih berada di jalur yang tepat (on track) guna mengejar seluruh target operasional yang telah ditetapkan oleh perseroan untuk sepanjang tahun 2026.

Direktur Utama PTBA, Bambang Ismawan menyampaikan, pihaknya optimis mampu mencapai target produksi batubara yang membidik angka sekitar 49,5 juta ton pada tahun ini.

"PTBA sedang dalam proses pengajuan usulan rencana produksi 2027 kepada Kementerian ESDM. Kami senantiasa memprioritaskan kebutuhan suplai domestik, sembari mencermati peluang pasar ekspor," ujarnya melalui keterangan tertulis, Senin (12/10/2026).

Bambang mengungkapkan, keandalan rantai pasok yang terintegrasi dari hulu ke hilir menjadi fondasi utama perusahaan dalam mempertahankan stabilitas operasional harian. Pengelolaan yang terintegrasi tersebut mencakup seluruh tahapan penambangan di area tambang, moda angkutan kereta api, hingga pengelolaan dermaga pelabuhan untuk memenuhi kebutuhan para pelanggan secara tepat waktu.

"Dukungan rantai pasok yang terintegrasi menjadi salah satu modal penting bagi PTBA dalam menjaga keandalan pasokan," ungkapnya.

Sementara itu, Kementerian ESDM sendiri terus berbenah untuk mempercepat evaluasi RKAB agar kepastian kapasitas produksi badan usaha dapat diperoleh lebih cepat.

Pemerintah menargetkan rasio keberhasilan permohonan RKAB periode berikutnya terus meningkat seiring penyelarasan pemahaman antara pihak evaluator dan para pelaku usaha di sektor pertambangan. 🔄

PTBA noted that the company's production and sales performance remain on track to achieve all operational targets set by the company for 2026.

PTBA President Director, Bambang Ismawan, said that his company is optimistic about achieving its coal production target of around 49.5 million tons this year.

"PTBA is in the process of submitting its 2027 production plan to the Ministry of Energy and Mineral Resources. We will continue to prioritize domestic supply needs while closely monitoring export market opportunities," he said in a written statement on Monday (October 12, 2026).

Bambang explained that a reliable, integrated supply chain from upstream to downstream is the company's primary foundation for maintaining stable daily operations. This integrated management encompasses all stages of mining in the mine area, rail transportation, and port dock management to ensure timely customer needs are met.

"Integrated supply chain support is a key asset for PTBA in maintaining supply reliability," he said.

Meanwhile, the Ministry of Energy and Mineral Resources itself continues to improve its efforts to accelerate the evaluation of the RKAB (Work Plan and Budget) so that certainty about the production capacity of business entities can be obtained more quickly.

The government is targeting a continued increase in the success rate of RKAB applications for the next period, in line with the alignment of understanding between evaluators and business actors in the mining sector. 🔄

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Indo Tambangraya (ITMG) Keluarkan Biaya Pengeboran Rp 7,86 Miliar di Kuartal III 2026

Penulis: Muhammad Alief Andri | Editor:
Khomarul Hidayat

PT INDO Tambangraya Megah Tbk (ITMG) melanjutkan kegiatan pengeboran batubara melalui sejumlah anak usahanya sepanjang Juli hingga September 2026. Kegiatan tersebut mencakup pengeboran pra-produksi dan eksplorasi untuk mendukung pengumpulan data geologi serta pengembangan tambang.

Merujuk keterbukaan informasi ITMG pada Senin (12/10/2026), aktivitas dilakukan melalui empat anak usaha ITMG, yakni PT Trubaindo Coal Mining (TCM), PT Indominco Mandiri, PT Bharinto Ekatama, dan PT Nusa Persada Resources (NPR).

PT Trubaindo Coal Mining mengeluarkan biaya pengeboran sebesar Rp 2,45 miliar selama periode tersebut. Kegiatan dilakukan di Blok Selatan, Kecamatan Damai, Kabupaten Kutai Barat, Kalimantan Timur, dengan dukungan kontraktor jasa pengeboran PT Cosyindo Teknik.

TCM menyelesaikan 51 lubang pengeboran yang terdiri atas 49 lubang pra-produksi dan dua lubang bawah tanah untuk analisis gas. Total kedalaman pengeboran mencapai 4.031,5 meter, terdiri atas 3.015,15 meter dengan metode open hole dan 1.016,35 meter dengan metode coring. Perusahaan juga mengambil 186 sampel batubara.

Sementara itu, PT Indominco Mandiri mengeluarkan biaya pengeboran sebesar Rp 353,66 juta pada kuartal III 2026.

Indo Tambangraya (ITMG) Spends Rp 7.86 Billion on Drilling in the Third Quarter of 2026

Author: Muhammad Alief Andri | Editor:
Khomarul Hidayat

PT INDO Tambangraya Megah Tbk (ITMG) continued coal drilling activities through several of its subsidiaries from July to September 2026. These activities include pre-production and exploration drilling to support geological data collection and mine development.

Referring to ITMG's information disclosure on Monday (12/10/2026), activities are carried out through four ITMG subsidiaries, namely PT Trubaindo Coal Mining (TCM), PT Indominco Mandiri, PT Bharinto Ekatama, and PT Nusa Persada Resources (NPR).

PT Trubaindo Coal Mining incurred Rp 2.45 billion in drilling costs during the period. The work was carried out in the South Block, Damai District, West Kutai Regency, East Kalimantan, with support from drilling services contractor PT Cosyindo Teknik.

TCM completed 51 drill holes, consisting of 49 pre-production holes and two underground holes for gas analysis. The total drilling depth reached 4,031.5 meters, consisting of 3,015.15 meters using the open-hole method and 1,016.35 meters using the coring method. The company also took 186 coal samples.

Meanwhile, PT Indominco Mandiri incurred drilling costs of Rp 353.66 million in the third quarter of 2026.

Perusahaan tidak melakukan pengeboran pengembangan maupun pra-produksi di Blok Barat dan Blok Timur karena proses tender kontrak pengeboran masih berlangsung.

Proses tender tersebut diperkirakan selesai pada Desember 2026 dan akan dilanjutkan dengan kegiatan pengeboran. Meski belum melakukan pengeboran selama periode tersebut, Indominco Mandiri mengambil 262 sampel batubara dari area tambang eksisting dan run of mine (ROM).

Adapun PT Bharinto Ekatama mencatat biaya pengeboran sebesar Rp 3,27 miliar. Kegiatan pengeboran dilakukan di wilayah operasional perusahaan, termasuk Blok Lempanang dan Blok Tenaik. Berdasarkan tabel laporan, kegiatan tersebut mencakup total 88 lubang pengeboran dengan 1.314 sampel batubara.

Dalam laporan tersebut, Bharinto Ekatama juga menjelaskan bahwa analisis kualitas batubara dilakukan menggunakan standar ISO dan ASTM. Parameter yang diuji meliputi kadar karbon, hidrogen, oksigen, nitrogen, sulfur, kelembapan, kadar abu, zat terbang, dan karbon tetap.

Selanjutnya, PT Nusa Persada Resources menyelesaikan pengeboran eksplorasi rinci di area PPKH SK.281. Kegiatan tersebut mencakup 78 lubang dengan total kedalaman 4.503,23 meter, terdiri atas 2.909,25 meter pengeboran open hole dan 1.593,98 meter pengeboran inti atau coring.

NPR mengeluarkan biaya pengeboran sebesar Rp 1,79 miliar dan mengambil 736 sampel batubara selama kuartal III 2026. Kegiatan pengeboran tersebut ditujukan untuk mendukung kajian geoteknik dan hidrogeologi, pengujian potensi pembentukan air asam tambang, serta konfirmasi kualitas dan kesinambungan lapisan batubara.

The company did not conduct development or pre-production drilling in the West and East Blocks because the drilling contract tender process was still ongoing.

The tender process is expected to be completed in December 2026, and drilling activities will follow. Although no drilling has taken place during that period, Indominco Mandiri has taken 262 coal samples from the existing mine area and run-of-mine (ROM).

PT Bharinto Ekatama recorded drilling costs of Rp 3.27 billion. Drilling activities were conducted in the company's operational areas, including the Lempanang and Tenaik Blocks. According to the report table, the activities involved a total of 88 drill holes with 1,314 coal samples.

In the report, Bharinto Ekatama also explained that coal quality analysis was conducted using ISO and ASTM standards. The parameters tested included carbon, hydrogen, oxygen, nitrogen, sulfur, moisture, ash, volatile matter, and fixed carbon content.

Next, PT Nusa Persada Resources completed detailed exploration drilling in the PPKH SK.281 area. The activity involved 78 holes with a total depth of 4,503.23 meters, consisting of 2,909.25 meters of open-hole drilling and 1,593.98 meters of core drilling.

NPR spent Rp 1.79 billion on drilling and took 736 coal samples during the third quarter of 2026. The drilling activities were aimed at supporting geotechnical and hydrogeological studies, testing the potential for acid mine drainage formation, and confirming the quality and continuity of the coal seams.

Pengujian sampel batubara NPR dilakukan melalui laboratorium internal PT Trubaindo Coal Mining dan laboratorium pihak ketiga, PT Geoservices. NPR berencana melanjutkan kegiatan pengeboran eksplorasi rinci di area PPKH SK.281 hingga akhir 2026. 🌐

NPR's coal sample testing was conducted through PT Trubaindo Coal Mining's internal laboratory and a third-party laboratory, PT Geoservices. NPR plans to continue detailed exploration drilling in the PPKH SK.281 area until the end of 2026. 🌐

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Eksplorasi Emas Pani, Merdeka Gold Resources (EMAS) Sudah Habiskan Rp 34,9 Miliar

Penulis: Muhammad Alief Andri | Editor: Khomarul Hidayat

PT MERDEKA Gold Resources Tbk (EMAS) mengeluarkan biaya eksplorasi sebesar Rp 34,9 miliar atau setara sekitar US\$ 1,95 juta di Tambang Emas Pani, Gorontalo, sepanjang kuartal III 2026.

Berdasarkan keterbukaan informasi pada Senin (12/10/2026), kegiatan eksplorasi EMAS difokuskan pada pengembangan sumber daya emas di Tambang Emas Pani, Provinsi Gorontalo, Sulawesi.

Sebagian besar kegiatan dilakukan oleh PT Gorontalo Sejahtera Mining (GSM) dan PT Puncak Emas Tani Sejahtera (PETS), dengan dukungan PT Merdeka Teknik Servis (MTS).

Selama periode tersebut, EMAS menyelesaikan pengeboran eksplorasi menggunakan metode diamond drilling dengan total kedalaman mencapai 9.219,4 meter. Pengeboran dilakukan di tiga area, yakni Prospek Kolokoa di selatan pit utama, Prospek Lone Pine di utara pit utama, serta area di bawah pit utama melalui pengeboran dalam.

Secara terperinci, tabel laporan mencatat pengeboran permukaan sebanyak 25 lubang dengan total kedalaman 8.531,4 meter. Perinciannya,...

Merdeka Gold Resources (EMAS) has Spent Rp 34.9 billion on Pani Gold Exploration

Author: Muhammad Alief Andri | Editor: Khomarul Hidayat

PT MERDEKA Gold Resources Tbk (EMAS) spent Rp 34.9 billion, equivalent to approximately US\$ 1.95 million, on exploration at the Pani Gold Mine in Gorontalo during the third quarter of 2026.

Based on information disclosure on Monday (12/10/2026), EMAS exploration activities are focused on developing gold resources at the Pani Gold Mine, Gorontalo Province, Sulawesi.

Most of the activities are carried out by PT Gorontalo Sejahtera Mining (GSM) and PT Puncak Emas Tani Sejahtera (PETS), with the support of PT Merdeka Teknik Servis (MTS).

During this period, EMAS completed exploration drilling using diamond drilling to a total depth of 9,219.4 meters. Drilling was conducted in three areas: the Kolokoa Prospect south of the main pit, the Lone Pine Prospect north of the main pit, and an area below the main pit using deep drilling.

In detail, the report table lists 25 surface drilling holes with a total depth of 8,531.4 meters. These include...

Perinciannya, enam lubang di area Gunung Pani dengan kedalaman 2.600,5 meter, 13 lubang di Prospek Kolokoa sepanjang 3.964,3 meter, serta enam lubang di Prospek Lone Pine dengan kedalaman 1.966,6 meter.

Selain pengeboran, EMAS melakukan pemetaan geologi, pengambilan sampel permukaan, serta pencatatan dan analisis inti bor. Analisis tersebut mencakup identifikasi mineralisasi dan alterasi batuan menggunakan sejumlah metode, antara lain X-ray fluorescence (XRF), ASD, laser-induced breakdown spectroscopy (LIBS), dan inductively coupled plasma (ICP).

Perusahaan juga memperbarui model geologi yang mencakup litologi, alterasi, oksidasi, dan struktur batuan, serta survei topografi untuk mendukung perencanaan pit. Pembaruan dilakukan dengan memanfaatkan hasil pengeboran terbaru, pemetaan geologi, dan pengambilan sampel permukaan.

EMAS memilih area eksplorasi berdasarkan hasil kegiatan sebelumnya yang menunjukkan potensi mineralisasi serta kebutuhan untuk memperdalam pemahaman mengenai kondisi geologi, baik di dalam maupun di luar area pit yang direncanakan. Seiring dimulainya operasi pertambangan pada kuartal IV 2025, kegiatan eksplorasi turut difokuskan pada area dekat pit untuk mendukung pengembangan sumber daya emas.

Meski telah menyelesaikan pengeboran selama kuartal III, EMAS belum memperbarui estimasi sumber daya mineral pada periode tersebut. Hasil pengeboran dan pemutakhiran model geologi masih menjadi bagian dari proses evaluasi potensi sumber daya di Tambang Emas Pani. 

These include six holes in the Gunung Pani area at a depth of 2,600.5 meters, 13 holes in the Kolokoa Prospect at a depth of 3,964.3 meters, and six holes in the Lone Pine Prospect at a depth of 1,966.6 meters.

In addition to drilling, EMAS conducts geological mapping, surface sampling, and core recording and analysis. This analysis includes identifying mineralization and rock alteration using a number of methods, including X-ray fluorescence (XRF), ASD, laser-induced breakdown spectroscopy (LIBS), and inductively coupled plasma (ICP).

The company also updated the geological model, which includes lithology, alteration, oxidation, and rock structure, as well as a topographic survey to support pit planning. The updates were conducted using the latest drilling results, geological mapping, and surface sampling.

EMAS selected the exploration area based on previous activities demonstrating potential mineralization and the need to deepen its understanding of the geology, both within and outside the planned pit area. With the commencement of mining operations in the fourth quarter of 2025, exploration activities will also focus on the near-pit area to support gold resource development.

Despite completing drilling during the third quarter, EMAS has not yet updated its mineral resource estimate for that period. Drilling results and geological model updates are still part of the resource potential evaluation process at the Pani Gold Mine. 

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Darma Henwa (DEWA) Tunda Pengeboran Proyek Gayo, Fokus Siapkan Eksplorasi Lanjutan

Penulis: Muhammad Alief Andri | Editor:
Khomarul Hidayat

PT DARMA Henwa Tbk (DEWA) masih menunda kegiatan pengeboran di proyek eksplorasi tembaga Upper Tengkereng yang dikelola anak usahanya, PT Gayo Mineral Resources (GMR).

Penundaan tersebut berlangsung sejak 8 Maret 2026 akibat proses perizinan Izin Usaha Pertambangan (IUP) yang belum selesai hingga akhir kuartal III 2026.

Berdasarkan keterbukaan informasi DEWA yang disampaikan Senin (12/10/2026), tidak terdapat kegiatan pengeboran baru sepanjang kuartal III. Total pengeboran kumulatif proyek hingga akhir kuartal II tercatat sebesar 31.485,75 meter dan belum berubah selama kuartal III.

Meski demikian, GMR tetap melanjutkan berbagai pekerjaan pendukung untuk mempersiapkan pengeboran berikutnya. Kegiatan tersebut mencakup pengembangan pemahaman karakteristik bijih, analisis mineralogi, kajian geoteknik dan hidrologi, serta pembenahan fasilitas penyimpanan inti bor dan sistem pengelolaan data eksplorasi.

Dalam laporan tersebut, perusahaan menyebut kegiatan pengeboran fase kedua atau Phase 2B direncanakan berlanjut setelah perizinan diperoleh. Program ini mencakup pengeboran untuk mendukung kajian sumber daya, geoteknik, hidrologi, metalurgi, serta kebutuhan infrastruktur tambang bawah tanah.

Darma Henwa (DEWA) Postpones Drilling for Gayo Project to Focus on Further Exploration Preparations

Author: Muhammad Alief Andri | Editor:
Khomarul Hidayat

PT DARMA Henwa Tbk (DEWA) is still postponing drilling activities at the Upper Tengkereng copper exploration project managed by its subsidiary, PT Gayo Mineral Resources (GMR).

The postponement has been in place since March 8, 2026, due to the Mining Business Permit (IUP) licensing process not being completed by the end of the third quarter of 2026.

According to DEWA's disclosure on Monday (October 12, 2026), there was no new drilling activity during the third quarter. The project's cumulative drilling through the end of the second quarter was recorded at 31,485.75 meters and remained unchanged throughout the third quarter.

Nevertheless, GMR continues various supporting work to prepare for the next drilling. These activities include developing an understanding of ore characteristics, mineralogical analysis, geotechnical and hydrological studies, and improvements to core storage facilities and exploration data management systems.

In the report, the company stated that the second phase, or Phase 2B, drilling activities are planned to continue after permits are obtained. This program includes drilling to support resource studies, geotechnical, hydrological, and metallurgical assessments, as well as underground mining infrastructure requirements.

Untuk mendukung pengembangan proyek, GMR juga melanjutkan persiapan lokasi dan akses lahan. Pekerjaan pemotongan, penimbunan, dan perataan lahan di area selatan telah selesai 100%.

Sementara itu, pemetaan kepemilikan lahan di Southeast Tengkereng menggunakan citra drone masih berlangsung, dengan dua titik pengeboran yang direncanakan belum berhasil diamankan.

Dari sisi kajian geologi, perusahaan melanjutkan analisis karakteristik bijih atau Ore Body Knowledge (OBK) dengan mengintegrasikan data pengeboran, litologi, alterasi, struktur, mineralisasi, petrografi, serta analisis mineralogi otomatis. Hasil kajian tersebut akan digunakan untuk memperbarui model geologi dan menentukan prioritas pengeboran berikutnya.

GMR juga melanjutkan analisis petrografi dan mineralogi otomatis menggunakan metode SEM-AMICS. Dalam laporan kemajuan periode sebelumnya, analisis telah mencakup 15 dari 70 sampel.

Sementara itu, akuisisi data spektral menggunakan ASD telah rampung untuk 400 sampel, terdiri atas 300 sampel dari Upper Tengkereng dan 100 sampel regional. Interpretasi data serta pengembangan model tiga dimensi himpunan mineral masih berlangsung.

GMR turut menyiapkan audit dan kajian independen sumber daya mineral berdasarkan standar Joint Ore Reserves Committee (JORC). Untuk keperluan tersebut, GMR telah menunjuk SRK Consulting (Australasia) Pty Ltd guna melakukan peninjauan data independen, menyusun domain geologi dan estimasi, serta mendukung penyusunan estimasi sumber daya berdasarkan data pengeboran fase kedua.

To support project development, GMR is also continuing site preparation and land access. Land clearing, filling, and leveling work in the southern area are now 100% complete.

Meanwhile, land ownership mapping in Southeast Tengkereng using drone imagery is still ongoing, with two planned drilling sites yet to be secured.

From a geological perspective, the company is continuing its analysis of ore characteristics, or Ore Body of Knowledge (OBK), by integrating drilling data, lithology, alteration, structure, mineralization, petrography, and automated mineralogical analysis. The results of this study will be used to update the geological model and determine future drilling priorities.

GMR is also continuing automated petrographic and mineralogical analysis using the SEM-AMICS method. In the previous progress report, analysis covered 15 of the 70 samples.

Meanwhile, spectral data acquisition using ASD has been completed for 400 samples, consisting of 300 from Upper Tengkereng and 100 regional samples. Data interpretation and development of a three-dimensional model of the mineral assemblage are ongoing.

GMR is also preparing an independent audit and study of mineral resources based on Joint Ore Reserves Committee (JORC) standards. For this purpose, GMR has appointed SRK Consulting (Australasia) Pty Ltd to conduct an independent data review, develop geological domains and estimates, and support the preparation of resource estimates based on second-phase drilling data.

Kunjungan lapangan pertama SRK Consulting telah dilakukan pada September 2026. GMR juga menyelesaikan kajian geologi regional hingga lokal di Upper Tengkereng untuk mendukung penyusunan laporan sumber daya mineral independen.

Di sisi pengelolaan data, perusahaan telah menyelesaikan tahap User Acceptance Test (UAT) untuk sistem basis data geologi yang digunakan dalam pengelolaan data pengeboran. Sistem tersebut ditargetkan siap digunakan pada akhir Oktober 2026. GMR juga telah melengkapi dokumentasi prosedur operasional standar departemen eksplorasi untuk memenuhi kebutuhan JORC.

Dalam rencana berikutnya, GMR akan mempercepat proses perpanjangan IUP Eksplorasi dan peningkatan izin menjadi IUP Operasi Produksi, sembari mempertahankan kesiapan operasional agar pengeboran dapat segera dimulai kembali setelah izin diperoleh.

Program pengeboran fase kedua mencakup 13.172 meter untuk kajian OBK di Upper Tengkereng, 3.620 meter untuk kebutuhan geoteknik dan hidrologi infrastruktur tambang bawah tanah, 1.000 meter untuk program eksplorasi Southeast Tengkereng, 250 meter untuk pengeboran portal bawah tanah, serta 680 meter untuk infrastruktur pendukung tambang permukaan.

Selain perizinan, perusahaan mencatat bahwa penyelesaian analisis laboratorium dan interpretasi model ASD masih menjadi faktor yang memengaruhi kemajuan kajian mineralogi dan geo-metalurgi. Kondisi kahar berupa banjir bandang dan tanah longsor di Aceh dan sekitarnya juga disebut menghambat akses serta logistik. 🌊

SRK Consulting's first field visit was conducted in September 2026. GMR also completed regional and local geological studies at Upper Tengkereng to support the preparation of an independent mineral resource report.

On the data management side, the company has completed the User Acceptance Test (UAT) phase for the geological database system used in drilling data management. The system is targeted for use by the end of October 2026. GMR has also completed documentation of the exploration department's standard operating procedures to meet JORC requirements.

In the next plan, GMR will expedite the process of extending the Exploration IUP and upgrading the permit to a Production Operation IUP, while maintaining operational readiness so that drilling can be restarted immediately after the permit is obtained.

The second phase drilling program includes 13,172 meters for OBK studies in Upper Tengkereng, 3,620 meters for geotechnical and hydrological needs of underground mining infrastructure, 1,000 meters for the Southeast Tengkereng exploration program, 250 meters for underground portal drilling, and 680 meters for surface mining support infrastructure.

In addition to permits, the company noted that completing laboratory analysis and interpreting ASD models remains a significant factor affecting the progress of mineralogical and geometallurgical studies. Force majeure, including flash floods and landslides in Aceh and the surrounding area, is also said to be hampering access and logistics. 🌊



RKAB 2027 Dibuka: Pengajuan 6 Pekan hingga Daftar Persyaratan

Azura Yumna Ramadani Purnama

PENGAJUAN Rencana Kerja dan Anggaran Biaya (RKAB) 2027 telah resmi dibuka mulai 1 Oktober 2026. Penambang memiliki waktu mengajukan dokumen ke Kementerian ESDM paling lambat pada 15 November 2026.

Batas waktu tersebut sesuai dengan ketentuan Peraturan Menteri (Permen) Energi dan Sumber Daya Mineral (ESDM) No. 17/2025 tentang Tata Cara Penyusunan, Penyampaian, dan Persetujuan Rencana Kerja dan Anggaran Biaya serta Tata Cara Pelaporan Pelaksanaan Kegiatan Usaha Pertambangan Mineral dan Batubara.

Ketentuan dalam permen tersebut memberikan tenggat pengajuan selama kurang lebih enam pekan atau 46 hari kalender bagi badan usaha pertambangan untuk memproses dan mengajukan dokumen RKAB.

"Paling cepat pada 1 Oktober dan paling lambat pada 15 November setiap tahunnya untuk IUP tahap kegiatan Eksplorasi, IUPK tahap kegiatan Eksplorasi, IUP tahap kegiatan Operasi Produksi, IUPK tahap kegiatan Operasi Produksi, atau IUPK sebagai Kelanjutan Operasi," tulis Pasal 4 poin b Permen ESDM No 17/2025.

Persyaratan Pelaporan

Dalam proses pengajuannya, seluruh pemegang izin usaha pertambangan (IUP), izin usaha pertambangan khusus (IUPK), maupun IUPK sebagai kelanjutan operasi kontrak atau perjanjian diwajibkan menyampaikan RKAB secara daring melalui sistem informasi terintegrasi.

2027 RKAB Open: Six-Week Timeline from Submission to Requirements List

Azura Yumna Ramadani Purnama

SUBMISSION of the 2027 Work Plan and Budget (RKAB) has officially opened starting October 1, 2026. Miners have no later than November 15, 2026, to submit documents to the Ministry of Energy and Mineral Resources.

The deadline is in accordance with the provisions of the Regulation of the Minister of Energy and Mineral Resources (ESDM) No. 17/2025 concerning Procedures for the Preparation, Submission, and Approval of Work Plans and Budgets as well as Procedures for Reporting on the Implementation of Mineral and Coal Mining Business Activities.

The provisions in the regulation provide a submission deadline of approximately six weeks or 46 calendar days for mining business entities to process and submit RKAB documents.

"At the earliest on October 1 and at the latest on November 15 each year for IUP in the Exploration activity stage, IUPK in the Exploration activity stage, IUP in the Production Operation activity stage, IUPK in the Production Operation activity stage, or IUPK as a Continuation of Operations," reads Article 4 point b of ESDM Ministerial Regulation No. 17/2025.

Reporting Requirements

In the application process, all holders of mining business permits (IUP), special mining business permits (IUPK), and IUPK as a continuation of contract or agreement operations are required to submit their RKAB online through an integrated information system.

Pengajuan tersebut harus memenuhi serangkaian kelengkapan dokumen yang disesuaikan dengan tahapan kegiatan usaha; baik untuk tahap eksplorasi maupun tahap operasi produksi.

Untuk RKAB tahap eksplorasi, pemohon diwajibkan melengkapi dokumen administratif yang terhubung langsung dengan sistem *online single submission* (OSS), menyertakan bukti pembayaran penerimaan negara bukan pajak (PNBP).

Lalu, menyerahkan peta digital realisasi dan rencana kegiatan eksplorasi, melampirkan bukti penempatan jaminan reklamasi tahap eksplorasi, serta menunjuk Kepala Teknik Tambang (KTT).

Sementara itu, persyaratan untuk RKAB tahap operasi produksi, pemohon harus menyertakan kelengkapan administratif terintegrasi sistem OSS, laporan estimasi sumber daya dan cadangan yang disusun oleh competent person, serta bukti pelunasan kewajiban PNBP.

Selain itu, pemohon wajib menyajikan peta digital pelaksanaan kegiatan usaha pertambangan secara menyeluruh yang mencakup peta realisasi dan rencana eksplorasi lanjutan, penambangan, bukaan lahan, hingga kawasan hutan yang tumpang-tindih dengan wilayah izin.

Kemudian, pemohon harus menunjuk kepala teknik tambang, bukti penempatan jaminan reklamasi tahap operasi produksi satu tahun sebelumnya, serta kepastian bahwa rencana lokasi dan tingkat produksi yang diajukan tidak melebihi kapasitas maksimal dalam dokumen studi kelayakan maupun izin lingkungan yang telah disetujui.

Khusus komoditas mineral logam dan batubara, perkiraan jumlah produksi juga harus disesuaikan dengan kebutuhan industri dan pasar dalam negeri.

The application must meet a series of complete documents tailored to the stages of business activities, both for the exploration and production operations stages.

For the exploration phase of the RKAB, applicants are required to complete administrative documents that are directly connected to the *online single submission* (OSS) system, including proof of payment of non-tax state revenue (PNBP).

Then, submit a digital map of the realization and exploration activity plan, attach proof of placement of the exploration stage reclamation guarantee, and appoint a Head of Mining Engineering (KTT).

Meanwhile, the requirements for the RKAB for the production operations stage, applicants must include complete integrated administrative documentation for the OSS system, resource and reserve estimation reports prepared by a competent person, and proof of payment of PNBP obligations.

In addition, applicants are required to provide a comprehensive digital map of the implementation of mining business activities, including maps of realization and plans for further exploration, mining, land clearing, and forest areas that overlap with the permit area.

Then, the applicant must appoint a head of mining engineering, proof of placement of reclamation guarantees for the production operation stage one year prior, as well as assurance that the proposed location plan and production level do not exceed the maximum capacity in the feasibility study document or the approved environmental permit.

Specifically for metal mineral and coal commodities, production volume estimates must also be adjusted to the needs of the domestic industry and market.

"Dalam permohonan persetujuan RKAB, pemegang IUP tahap kegiatan operasi produksi, pemegang IUPK tahap kegiatan operasi produksi, atau pemegang IUPK sebagai kelanjutan operasi kontrak/perjanjian mineral logam dan batu bara menyampaikan perkiraan jumlah produksi sesuai dengan kebutuhan industri/pasar mineral dan batu bara nasional," bunyi Pasal 5 Ayat 4.

Proses Evaluasi

Dalam permen tersebut dijelaskan proses evaluasi dan penerbitan persetujuan RKAB oleh Menteri ESDM dilakukan dalam jangka waktu paling lama lima hari kerja untuk menentukan apakah permohonan disetujui atau memerlukan perbaikan.

Jika dokumen belum lengkap, pemegang izin diberikan waktu maksimal dua hari kerja untuk menyampaikan penyempurnaan. Kesempatan evaluasi dan perbaikan ini diberikan paling banyak tiga kali.

Adapun, keputusan akhir berupa penerbitan persetujuan atau surat penolakan akan dikeluarkan dalam waktu paling lambat delapan hari kerja sejak proses evaluasi dan perbaikan selesai.

Sementara itu, bagi perusahaan yang permohonannya ditolak, terdapat satu kali kesempatan untuk kembali mengajukan permohonan RKAB tersebut.

"Dalam hal permohonan yang disampaikan pemegang perizinan berusaha telah lengkap dan RKAB belum mendapatkan persetujuan atau penolakan setelah berakhirnya jangka waktu sebagaimana dimaksud pada Ayat (5), persetujuan RKAB diterbitkan oleh sistem informasi terkait RKAB secara otomatis," bunyi Pasal 6 Ayat 6.

Sekadar informasi, Kementerian ESDM mengklaim proses evaluasi pengajuan RKAB 2027 bakal dilakukan lebih cepat dibandingkan dengan RKAB 2026.

"In the application for approval of the RKAB, the holder of an IUP in the production operation stage, the holder of an IUPK in the production operation stage, or the holder of an IUPK as a continuation of the operation of a metal mineral and coal contract/agreement shall submit an estimate of the production volume in accordance with the needs of the national mineral and coal industry/market," reads Article 5 Paragraph 4.

Evaluation Process

The regulation explains that the evaluation process and issuance of RKAB approval by the Minister of Energy and Mineral Resources is carried out within a maximum period of five working days to determine whether the application is approved or requires revision.

If the documents are incomplete, the permit holder is given a maximum of two working days to submit improvements. This evaluation and revision period is given a maximum of three times.

Meanwhile, the final decision in the form of issuing an approval or rejection letter will be issued no later than eight working days after the evaluation and improvement process is completed.

Meanwhile, for companies whose applications are rejected, there is one opportunity to resubmit the RKAB application.

"In the event that the application submitted by the business permit holder is complete and the RKAB has not received approval or rejection after the end of the time period as referred to in Paragraph (5), the RKAB approval will be issued by the RKAB related information system automatically," reads Article 6 Paragraph 6.

For your information, the Ministry of Energy and Mineral Resources claims that the evaluation process for the 2027 RKAB submission will be carried out more quickly than the 2026 RKAB.

Kementerian ESDM juga berjanji bakal memutuskan kuota produksi bijih nikel secara adil.

Dalam kaitan itu, Direktur Pembinaan Pengusahaan Mineral Ditjen Minerba Kementerian ESDM Cecep Mochammad Yasin menargetkan sudah dapat menerbitkan RKAB 2027 untuk komoditas bijih nikel lebih cepat dari batas waktu yang ditetapkan dalam peraturan yang berlaku.

"Kita juga di dalam memperbaiki prosesnya supaya lebih cepat, tidak ada lagi perbedaan pemahaman antara kami dengan juga pemohon, sehingga pada saat evaluasi tidak perlu sampai dengan waktu maksimum, evaluasi itu secara ketentuan bisa diberikan tapi di awal-awal pun sudah bisa," kata Cecep dalam BIG Downstream Insight, Selasa (6/10/2026).

Sebelumnya, Kementerian ESDM memperkirakan produksi batu bara mencapai 720 juta metrik ton hingga akhir 2026. Pada awal 2026, padahal, Kementerian ESDM mengatakan kuota produksi batu bara dalam RKAB 2026 berada di sekitar 600 juta metrik ton.

Untuk bijih nikel, Kementerian ESDM memperkirakan produksi sepanjang 2026 mencapai 290 juta metrik ton atau melebihi kuota produksi dalam RKAB 2026 yang ditetapkan sebesar 260–270 juta metrik ton. (wdh)

The Ministry of ESDM also promised to determine nickel ore production quotas fairly.

In this regard, the Director of Mineral Business Development at the Directorate General of Mineral and Coal at the Ministry of ESDM, Cecep Mochammad Yasin, is targeting to publish the 2027 RKAB for nickel ore commodities sooner than the deadline stipulated in the applicable regulations.

"We are also improving the process to make it faster, eliminating any misunderstandings between us and the applicants. This means that evaluations don't need to be subject to the maximum timeframe. Evaluations can be granted, as per the regulations, but they can be granted even at the beginning," Cecep said in BIG Downstream Insight, Tuesday (6/10/2026).

Previously, the Ministry of ESDM estimated coal production would reach 720 million metric tons by the end of 2026. In early 2026, however, the Ministry of ESDM stated that the coal production quota in the 2026 RKAB was around 600 million metric tons.

For nickel ore, the Ministry of ESDM estimates that production throughout 2026 will reach 290 million metric tons, exceeding the production quota set in the 2026 Work Plan and Budget (RKAB) of 260–270 million metric tons. (wdh)



Bahlil Klaim Lakukan Revolusi RKAB: Prioritaskan ke Tambang UMKM

Azura Yumna Ramadani Purnama

MENTERI Energi dan Sumber Daya Mineral (ESDM) Bahlil Lahadalia mengklaim melakukan langkah revolusioner dalam menyusun peraturan rencana kerja dan anggaran biaya (RKAB), yakni dengan memangkas kuota produksi penambang besar dan memberikannya ke perusahaan tambang kecil di daerah-daerah.

Bahlil menilai selama ini kuota produksi dalam RKAB cenderung dikuasai perusahaan-perusahaan besar. Dengan begitu, dirinya menilai perlu melakukan penyesuaian dengan memangkas sebagian kuota produksi perusahaan besar untuk diberikan kepada penambang berskala kecil.

Bahlil mencontohkan, perusahaan tambang yang baru mengantongi izin usaha pertambangan (IUP) dengan kuota produksi sekitar 200.000 metrik ton hingga 1 juta metrik ton dapat memperoleh kesempatan untuk meningkatkan usahanya dengan kebijakan tersebut.

"Ini betul-betul kita bikin revolusioner, Bos. Selama ini RKAB ini dikuasai oleh perusahaan-perusahaan besar. Aku bilang kasih *lah*, mereka itu pasti UMKM dan mereka pasti pribumi. Kaya juga tidak mungkin membawa uangnya ke luar negeri *kok*," kata Bahlil dalam Rakernas HIPPI, Senin (12/10/2026).

Atur Keseimbangan

Di sisi lain, Bahlil menyebut pemerintah juga mengatur produksi batu bara untuk menjaga keseimbangan pasokan dan permintaan.

Bahlil Claims to Revolutionize RKAB Process: Prioritizing MSME Mines

Azura Yumna Ramadani Purnama

THE MINISTER of Energy and Mineral Resources (ESDM), Bahlil Lahadalia, claimed to have taken a revolutionary step in drafting the work plan and budget (RKAB) regulations, namely by cutting production quotas for large miners and giving them to small mining companies in the regions.

Bahlil believes that production quotas in the RKAB tend to be dominated by large companies. Therefore, he believes adjustments need to be made by reducing some of the production quotas of large companies and allocating them to small-scale miners.

Bahlil cited the example of mining companies that have just obtained a mining business permit (IUP) with a production quota of around 200,000 metric tons to 1 million metric tons, which could gain the opportunity to expand their business through this policy.

"We're truly making this revolutionary, Boss. So far, the RKAB has been dominated by large companies. I said give it to them ; they're definitely MSMEs and they're definitely indigenous. Even the rich can't possibly take their money abroad ," Bahlil said at the HIPPI *National Working Meeting* on Monday (12/10/2026).

Set the Balance

On the other hand, Bahlil said the government is also regulating coal production to maintain a balance between supply and demand.

Dia mengklaim, meskipun volume produksi batu bara pada 2026 turun dibandingkan dengan tahun sebelumnya, nilai transaksi dan penerimaan negara bukan pajak (PNBP) justru meningkat.

Dia mengatakan langkah tersebut diambil karena Indonesia memasok sekitar 43% dari total batu bara yang diperdagangkan di pasar global, namun harga batu bara Indonesia masih dipengaruhi oleh negara lain.

"Saya jaga *supply and demand*, pada 2026 produksi batu bara kita dibandingkan dengan 2025 itu menurun volumenya, tetapi angka transaksinya itu melebihi di 2025 dan pendapatan negara kita PNBP kita naik," klaim dia.

Sebelumnya, Kementerian ESDM memperkirakan produksi batu bara mencapai 720 juta metrik ton hingga akhir 2026.

Pada awal 2026, padahal, Kementerian ESDM mengatakan kuota produksi batu bara dalam RKAB 2026 berada di sekitar 600 juta metrik ton.

Untuk bijih nikel, Kementerian ESDM memperkirakan produksi sepanjang 2026 mencapai 290 juta metrik ton atau melebihi kuota produksi dalam RKAB 2026 yang ditetapkan sebesar 260-270 juta metrik ton.

Sekadar catatan, Kementerian ESDM mengklaim proses evaluasi pengajuan RKAB 2027 bakal dilakukan lebih cepat dibandingkan dengan RKAB 2026.

Kementerian ESDM juga berjanji bakal memutuskan kuota produksi bijih nikel secara adil.

Dalam kaitan itu, Direktur Pembinaan Pengusahaan Mineral Ditjen Minerba Kementerian ESDM Cecep Mochammad Yasin menargetkan sudah dapat menerbitkan RKAB 2027 untuk komoditas bijih nikel lebih cepat dari batas waktu yang ditetapkan dalam peraturan yang berlaku.

He claimed that although coal production volume in 2026 decreased compared to the previous year, transaction value and non-tax state revenue (PNBP) actually increased.

He said the step was taken because Indonesia supplies around 43% of the total coal traded on the global market, but Indonesian coal prices are still influenced by other countries.

"I'm monitoring *supply and demand* . In 2026, our coal production volume will decrease compared to 2025, but the transaction volume will exceed 2025 levels, and our state revenue (PNBP) will increase," he claimed.

Previously, the Ministry of ESDM estimated coal production would reach 720 million metric tons by the end of 2026.

In early 2026, the Ministry of ESDM stated that the coal production quota in the 2026 Work Plan and Budget (RKAB) was around 600 million metric tons.

For nickel ore, the Ministry of ESDM estimates that production throughout 2026 will reach 290 million metric tons, exceeding the production quota set in the 2026 Work Plan and Budget (RKAB) of 260-270 million metric tons.

For the record, the Ministry of ESDM claims that the evaluation process for the 2027 RKAB submission will be carried out more quickly than the 2026 RKAB.

The Ministry of ESDM also promised to determine nickel ore production quotas fairly.

In this regard, the Director of Mineral Business Development at the Directorate General of Mineral and Coal at the Ministry of ESDM, Cecep Mochammad Yasin, is targeting to publish the 2027 RKAB for nickel ore commodities sooner than the deadline stipulated in the applicable regulations.

"Kita juga di dalam memperbaiki prosesnya supaya lebih cepat, tidak ada lagi perbedaan pemahaman antara kami dengan juga pemohon, sehingga pada saat evaluasi tidak perlu sampai dengan waktu maksimum, evaluasi itu secara ketentuan bisa diberikan tapi di awal-awal pun sudah bisa," kata Cecep dalam BIG Downstream Insight, Selasa (6/10/2026).

Dalam kaitan itu, Cecep mengungkapkan Ditjen Minerba telah meminta pelaku usaha pertambangan nikel untuk menyampaikan rencana produksi pada tahun depan, sehingga Ditjen Minerba dapat mengevaluasi kebutuhan bijih smelter dan kapasitas produksi hulu.

Dengan begitu, Cecep menyatakan Ditjen Minerba sudah dapat menyampaikan kuota produksi untuk tahun depan ketika proses pengajuan RKAB 2027 dimulai.

"Sehingga pada saat nanti permohonan itu disampaikan sudah clear kuota berapa yang mereka akan dapatkan," tegasnya.

Cecep menambahkan Ditjen Minerba juga terus melakukan evaluasi penerapan pelaporan RKAB per 1 tahun yang kembali diterapkan pada tahun ini.

Dia menyatakan sejumlah kekurangan dalam proses evaluasi RKAB 2026 terjadi karena proses transisi dari sistem pelaporan 3 tahunan ke 1 tahunan.

"Kita tidak ada tendensi untuk meng-keep cadangan kita supaya awet atau dahulukan impor, kita perbaiki kuota berbasis secara spasial," tutur Cecep.

Adapun, pengajuan RKAB 1 tahunan dilakukan paling cepat pada 1 Oktober tahun berjalan dan paling lambat pada 15 November setiap tahunnya.

Hal tersebut tertuang dalam Peraturan Menteri Energi dan Sumber Daya Mineral Nomor 17 Tahun 2025 tentang Tata Cara Penyusunan, Penyampaian, dan Perse-tujuan RKAB Serta Tata Cara Pelaporan Pelaksanaan Kegiatan Usaha Pertam-bangan Mineral dan Batubara. (azr/wdh)

"We are also improving the process to make it faster, eliminating any misunderstandings between us and the applicants. This means that evaluations don't need to be subject to the maximum timeframe. Evaluations can be granted, as per the regulations, but they can be granted even at the beginning," Cecep said in BIG Downstream Insight, Tuesday (6/10/ 2026).

In this regard, Cecep revealed that the Directorate General of Minerals and Coal has asked nickel mining businesses to submit production plans for next year, so that the Directorate General of Minerals and Coal can evaluate smelter ore needs and upstream production capacity.

Therefore, Cecep stated that the Directorate General of Minerals and Coal can submit production quotas for next year when the 2027 RKAB submission process begins.

"So that when the application is submitted, it will be clear what quota they will receive," he stressed.

Cecep added that the DitGen. of Minerals and Coal also continues to evaluate the implementation of annual RKAB reporting, which was re-implemented this year.

He stated that a number of shortcomings in the 2026 RKAB evaluation process occurred due to the transition process from a 3-yearly to a 1-yearly reporting system.

"We have no tendency to preserve *our* reserves or prioritize imports; we are improving quotas based on spatial basis," said Cecep.

Meanwhile, the submission of the 1st annual RKAB must be made at the earliest on October 1 of the current year and at the latest on November 15 of each year.

This is stipulated in Minister of Energy and Mineral Resources Regulation No. 17 of 2025 concerning Procedures for the Preparation, Submission, and Approval of the RKAB and Procedures for Reporting on the Implement-ation of Mineral and Coal Mining Business Activities. (azr/wdh)

REPUBLIK

**MIND ID Ungkap Pentingnya
Hilirisasi, Nilai Bauksit Bisa
Naik Jadi 80 Kali Lipat**

**Investasi strategis MIND ID diarahkan
untuk perkuat industrialisasi mineral
nasional**

Reporter: Frederikus Dominggus Bata/
Redaksi: Ichsan Emrald Alamsyah

HOLDING Industri Pertambangan MIND ID menyoroti pentingnya hilirisasi mineral untuk meningkatkan nilai ekonomi sumber daya alam Indonesia. Pengolahan bauksit menjadi aluminium, misalnya, dapat meningkatkan nilai dari sekitar 40 dolar AS per ton bijih mentah menjadi 3.200 dolar AS per ton aluminium, atau setara 80 kali lipat.

Perbedaan nilai tersebut menggambarkan potensi ekonomi dari pengolahan mineral di dalam negeri. Melalui hilirisasi, Indonesia tidak hanya menjual bahan mentah, tetapi juga mengembangkan produk olahan yang dapat memasok kebutuhan industri dengan nilai tambah lebih tinggi.

Direktur Utama MIND ID Dany Amrul Ichdan mengatakan, investasi strategis perusahaan diarahkan untuk memperkuat industrialisasi mineral nasional. Upaya tersebut mencakup pengembangan fasilitas pengolahan dan pemurnian serta pembangunan rantai industri yang terintegrasi dari hulu hingga hilir.

Salah satu fokus pengembangan tersebut adalah industri bauksit, alumina, dan aluminium di Kalimantan Barat. Integrasi rantai produksi diharapkan memperkuat pasokan aluminium nasional sekaligus meningkatkan pemanfaatan sumber daya mineral di dalam negeri.

**MIND ID Reveals the
Importance of Downstream
Processing, Bauxite Value
Could Increase 80-Fold**

**MIND ID's strategic investment is aimed
at strengthening national mineral
industrialization**

Reporter: Frederikus Dominggus Bata /
Editor: Ichsan Emrald Alamsyah

THE MINING Industry Holding MIND ID highlighted the importance of mineral downstreaming to increase the economic value of Indonesia's natural resources. Processing bauxite into aluminum, for example, can increase the value from around US\$40 per ton of raw ore to US\$3,200 per ton of aluminum, or an 80-fold increase.

This difference in value illustrates the economic potential of domestic mineral processing. Through downstream processing, Indonesia not only sells raw materials but also develops processed products that can supply industrial needs with higher added value.

MIND ID President Director Dany Amrul Ichdan stated that the company's strategic investments are aimed at strengthening national mineral industrialization. These efforts include developing processing and refining facilities and building an integrated industrial chain from upstream to downstream.

One focus of this development is the bauxite, alumina, and aluminum industry in West Kalimantan. Production chain integration is expected to strengthen the national aluminum supply while increasing the utilization of domestic mineral resources.

Selain bauksit, MIND ID mendorong pengembangan ekosistem baterai kendaraan listrik berbasis nikel. Pengembangan ini mencakup kawasan industri di Maluku hingga Jawa Barat untuk memperkuat rantai pasok industri kendaraan listrik nasional.

Penguatan industri pengolahan juga dilakukan melalui pengembangan fasilitas pemurnian logam berharga di Gresik, Jawa Timur. Berbagai proyek tersebut menjadi bagian dari strategi MIND ID untuk memperluas kapasitas pengolahan mineral dan memperkuat keterkaitan sektor pertambangan dengan industri manufaktur.

Dalam konteks perekonomian nasional, Menteri Investasi dan Hilirisasi/Kepala BKPM Rosan Roeslani menyebut realisasi investasi Indonesia selama satu dekade terakhir mencapai sekitar Rp 9.100 triliun. Investasi menjadi salah satu penggerak pertumbuhan ekonomi, termasuk melalui pengembangan industri yang dapat meningkatkan nilai tambah sumber daya alam.

Melalui investasi di berbagai proyek hilirisasi, MIND ID berupaya meningkatkan nilai ekonomi mineral sekaligus memperkuat struktur industri nasional. Pengembangan industri dari hulu hingga hilir diharapkan dapat mendukung kemandirian industri dan meningkatkan daya saing Indonesia dalam rantai pasok global. 

In addition to bauxite, MIND ID is promoting the development of a nickel-based electric vehicle battery ecosystem. This development encompasses industrial areas in Maluku and West Java to strengthen the national electric vehicle industry supply chain.

Strengthening the processing industry is also being carried out through the development of a precious metal refining facility in Gresik, East Java. These projects are part of MIND ID's strategy to expand mineral processing capacity and strengthen the linkages between the mining sector and the manufacturing industry.

In the context of the national economy, Minister of Investment and Downstreaming/ Head of the Investment Coordinating Board (BKPM) Rosan Roeslani stated that Indonesia's realized investment over the past decade has reached approximately IDR 9,100 trillion. Investment is a key driver of economic growth, including through industrial development that can increase the added value of natural resources.

Through investments in various downstream projects, MIND ID seeks to increase the economic value of minerals while strengthening the national industrial structure. Industrial development from upstream to downstream is expected to support industrial independence and enhance Indonesia's competitiveness in the global supply chain. 

TAMBANG

Gunakan Energi Terbarukan di Wilayah Operasi, ANTAM Berhasil Turunkan Konsumsi Energi 59 Persen

Rian Wahyuddin

PT ANTAM (Persero) Tbk (ANTM) berhasil menurunkan konsumsi energi sebesar 59% sepanjang semester I 2026. Hal ini berkat pemanfaatan sumber energi terbarukan di seluruh kegiatan operasional.

Corporate Secretary ANTAM, Wisnu Danandi Haryanto mengatakan, efisiensi energi menjadi bagian penting dalam meningkatkan efektivitas operasional sekaligus mengurangi dampak lingkungan dari kegiatan pertambangan dan pengolahan mineral.

"ANTAM terus mendorong efisiensi penggunaan energi melalui berbagai inisiatif di wilayah operasi, termasuk pemanfaatan energi terbarukan. Langkah ini tidak hanya mendukung efisiensi operasional, tetapi juga menjadi bagian dari upaya kami dalam menurunkan emisi gas rumah kaca," ujar Wisnu dalam keterangannya, Senin (12/10).

Sepanjang Semester I 2026, total konsumsi energi perusahaan tercatat sebesar 4,46 juta gigajoule (GJ) atau turun sebesar 59%.

Pada periode yang sama, total emisi gas rumah kaca (GRK) tercatat sebesar 0,57 juta ton CO₂e. Realisasi penurunan emisi GRK mencapai 15,62% atau lebih dari tiga kali lipat dibandingkan target penurunan emisi sebesar 4,60%.

Upaya pengelolaan lingkungan juga dilakukan melalui reklamasi lahan, rehabilitasi ekosistem, konservasi keanekaragaman hayati, dan pengelolaan air.

ANTAM Reduces Energy Consumption by 59 Percent by Using Renewable Energy in Its Operational Areas

Rian Wahyuddin

PT ANTAM (Persero) Tbk (ANTM) successfully reduced energy consumption by 59% throughout the first semester of 2026. This was thanks to the utilization of renewable energy sources in all operational activities.

ANTAM Corporate Secretary, Wisnu Danandi Haryanto, said that energy efficiency is an important part of increasing operational effectiveness while reducing the environmental impact of mining and mineral processing activities.

"ANTAM continues to promote energy efficiency through various initiatives in its operational areas, including the use of renewable energy. This step not only supports operational efficiency but is also part of our efforts to reduce greenhouse gas emissions," Wisnu said in a statement on Monday (October 12).

Throughout the first semester of 2026, the company's total energy consumption was recorded at 4.46 million gigajoules (GJ), a decrease of 59%.

During the same period, total greenhouse gas (GHG) emissions were recorded at 0.57 million tons of CO₂e. The actual reduction in GHG emissions reached 15.62%, more than three times the target of 4.60%.

Environmental management efforts are also carried out through land reclamation, ecosystem rehabilitation, biodiversity conservation, and water management.

Adapun, hingga Semester I 2026 realisasi reklamasi lahan mencapai 95,69 hektare atau melampaui target sebesar 85,3 hektare. Selain itu, sekitar 70.753 pohon telah ditanam sebagai bagian dari program pengelolaan dan pemulihan lingkungan.

PLTS Gag Nikel Kurangi Kebutuhan Operasi Genset

Berbagai capaian tersebut turut didukung oleh implementasi pemanfaatan energi terbarukan di wilayah operasi. Salah satunya melalui pemanfaatan Pembangkit Listrik Tenaga Surya (PLTS) di PT Gag Nikel.

PLTS di PT Gag Nikel sendiri dibangun di atas lahan seluas sekitar 5.634 meter persegi dengan luas bangunan power house sekitar 331 meter persegi.

Fasilitas ini memiliki kapasitas 500 kilowatt peak (kWp) dan dilengkapi 910 unit modul surya, 10 unit inverter, serta 400 unit baterai. Sistem tersebut terintegrasi dengan pembangkit eksisting yang ditopang oleh dua unit genset, masing-masing berkapasitas 250 kVA.

Wisnu mengatakan pemanfaatan PLTS tersebut memberikan manfaat terhadap efisiensi penggunaan BBM untuk kebutuhan genset di townsite. Berdasarkan kajian PT Gag Nikel, dalam skenario tanpa PLTS dengan asumsi beban 80% dan operasi genset selama 8.760 jam per tahun, konsumsi BBM diperkirakan mencapai 367.920 liter.

Sementara itu, dengan memperhitungkan kontribusi PLTS dan asumsi operasi genset selama 2.920 jam per tahun, konsumsi BBM diperkirakan menjadi sekitar 122.640 liter. Artinya, terdapat potensi pengurangan konsumsi BBM sebesar sekitar 245.280 liter per tahun berdasarkan skenario kajian tersebut.

Meanwhile, by the first semester of 2026, land reclamation had reached 95.69 hectares, exceeding the target of 85.3 hectares. Furthermore, approximately 70,753 trees had been planted as part of the environmental management and restoration program.

Nickel-Free Solar Power Plants Reduce Generator Operating Needs

These various achievements are also supported by the implementation of renewable energy utilization in operational areas, one of which is the use of a Solar Power Plant (PLTS) at PT Gag Nikel.

The PLTS at PT Gag Nikel itself was built on an area of approximately 5,634 square meters with a power house building area of approximately 331 square meters.

This facility has a capacity of 500 kilowatt peak (kWp) and is equipped with 910 solar modules, 10 inverters, and 400 batteries. The system is integrated with the existing power plant, which is supported by two 250 kVA generators.

Wisnu stated that the use of the solar power plant (PLTS) would improve fuel efficiency for the townsite's generator needs. Based on a study by PT Gag Nikel, in a scenario without the solar power plant, assuming an 80% load and 8,760 hours of generator operation per year, fuel consumption is estimated to reach 367,920 liters.

Meanwhile, taking into account the contribution of solar power plants and the assumption of 2,920 hours of generator operation per year, fuel consumption is estimated to be around 122,640 liters. This means there is a potential reduction in fuel consumption of around 245,280 liters per year based on the study scenario.

"Penerapan PLTS di PT Gag Nikel menjadi salah satu contoh bagaimana pemanfaatan energi terbarukan dapat memberikan manfaat langsung terhadap pengelolaan energi di wilayah operasi. Selain mendukung penggunaan sumber energi yang lebih bersih, pemanfaatan PLTS juga dapat mengurangi kebutuhan operasi genset," kata Wisnu. 

"The implementation of solar power plants at PT Gag Nikel is an example of how utilizing renewable energy can directly benefit energy management in operational areas. In addition to supporting the use of cleaner energy sources, solar power plants can also reduce the need for generator operation," said Wisnu. 



Harga Batu Bara Membara: Pasokan China Menipis, Listrik Padam di India

mae, CNBC Indonesia

HARGA batu bara melonjak lagi setelah China dan India melaporkan kekurangan pasokan.

Merujuk Refinitiv, harga batu bara pada perdagangan Senin (12/10/2026) menguat 0,7% ke US\$ 151,55 per ton. Harganya sudah naik dua hari beruntun.

Harga Batu Bara Melonjak di China

Harga batu bara termal China melonjak ke level tertinggi dalam tiga tahun.

Kenaikan ini dipicu oleh lambatnya pertumbuhan produksi domestik dan gangguan pasokan dari Indonesia, pemasok utama batu bara China, di tengah reli harga energi akibat perang AS-Iran.

Menurut Asosiasi Transportasi dan Distribusi Batu Bara China, harga acuan batu bara untuk pembangkit listrik mencapai CNY1.004 atau sekitar US\$150 per ton pada Senin (12/10/2026).

Ini menjadi kali pertama harga menembus level CNY 1.000 dalam dua tahun. Sejak pertengahan Juli, harga batu bara tersebut telah melonjak sekitar 25%.

Coal Prices Surge: China's Supply Runs Low, Power Outages in India

mae, CNBC Indonesia

COAL prices surged again after China and India reported supply shortages.

According to Refinitiv, coal prices rose 0.7% to US\$151.55 per ton on Monday (October 12, 2026). Prices have risen for two consecutive days.

Coal Prices Soar in China

China's thermal coal prices surge to their highest level in three years.

The increase was driven by slow domestic production growth and supply disruptions from Indonesia, China's main coal supplier, amid a rally in energy prices due to the US-Iran war.

According to the China Coal Transportation and Distribution Association, the reference price of coal for power generation reached CNY1,004 or around US\$150 per ton on Monday (12/10/2026).

This marks the first time the price has broken through the CNY 1,000 level in two years. Since mid-July, coal prices have surged by around 25%.

Batu bara masih menjadi sumber utama pembangkit listrik China, dengan kontribusi sekitar separuh dari bauran listrik negara tersebut, meskipun pengembangan energi terbarukan meningkat pesat dalam beberapa tahun terakhir.

Produksi batu bara domestik China turun lebih dari 3% sepanjang Januari-Agustus 2026 dibandingkan periode yang sama tahun sebelumnya.

Penurunan ini terjadi setelah pemerintah memperketat pengawasan keselamatan menyusul kecelakaan tambang mematikan di Provinsi Shanxi pada Mei lalu.

Pasar sebelumnya berharap produksi batu bara Shanxi pulih dengan tambahan kapasitas produksi tahunan sekitar 31 juta ton hingga akhir tahun.

Namun, persetujuan untuk mengoperasikan kembali tambang-tambang yang dihentikan berjalan lebih lambat dari perkiraan.

Pemerintah diperkirakan tetap berhati-hati menjelang pertemuan besar Partai Komunis pada akhir Oktober, sehingga pelanggaran aturan keselamatan dalam waktu dekat dinilai terbatas.

Selain itu, pemeliharaan selama tiga pekan pada jalur kereta batu bara utama China hingga 26 Oktober diperkirakan turut mempertahankan tekanan kenaikan harga.

Di tengah kendala produksi domestik, pengiriman batu bara dari Indonesia, pemasok utama batu bara termal impor China, juga turun tajam sepanjang tahun ini.

Penurunan terjadi setelah pemerintah Indonesia berupaya membatasi produksi untuk memulihkan harga batu bara dan meningkatkan penerimaan negara.

Belakangan, kekeringan yang berkaitan dengan fenomena El Niño turut menurunkan permukaan air sungai di sejumlah wilayah pertambangan batu bara Indonesia. Kondisi tersebut...

Coal remains China's primary source of electricity generation, contributing about half of the country's electricity mix, despite rapid renewable energy development in recent years.

China's domestic coal production fell by more than 3% from January to August 2026 compared to the same period the previous year.

The decline comes after the government tightened safety controls following a deadly mining accident in Shanxi Province last May.

The market had previously expected Shanxi coal production to recover with an additional annual production capacity of around 31 million tonnes by the end of the year.

However, approvals to restart the suspended mines have been slower than expected.

The government is expected to remain cautious ahead of a major Communist Party meeting in late October, so any immediate easing of safety rules is likely to be limited.

In addition, a three-week maintenance period on China's main coal railway line until October 26 is expected to maintain upward price pressure.

Amid domestic production constraints, coal shipments from Indonesia, China's main supplier of imported thermal coal, have also fallen sharply throughout the year.

The decline occurred after the Indonesian government attempted to limit production to restore coal prices and increase state revenue.

Recently, droughts associated with the El Niño phenomenon have also lowered river water levels in several Indonesian coal mining areas. This situation...

Kondisi tersebut memaksa operator tongkang mengurangi muatan, sehingga pengiriman batu bara semakin terhambat.

Tekanan harga diperkirakan berlanjut karena konsumsi batu bara China biasanya meningkat selama musim dingin.

Di sisi lain, gas alam cair atau liquefied natural gas (LNG), yang menjadi bahan bakar alternatif untuk pembangkit listrik, juga mengalami lonjakan harga sepanjang tahun ini. Perang di Timur Tengah menghambat pasokan Qatar akibat terganggunya jalur pengiriman melalui Selat Hormuz.

Dari Eropa dilaporkan kontrak berjangka batu bara Eropa mencapai level tertinggi dalam lebih dari dua tahun. Kontrak November API2 naik menjadi US\$146,80 per ton. Sementara itu, harga batu bara Afrika Selatan turut menguat didorong kuatnya permintaan dari Asia dan terbatasnya ketersediaan pasokan untuk pengiriman dalam waktu dekat.

Pembeli dari China kembali aktif mencari pasokan setelah libur Golden Week, dengan mengajukan permintaan pembelian baru. Namun, tingginya harga batu bara masih membatasi permintaan.

India Padamkan Listrik

Persoalan pasokan juga melanda India.

Pemadaman listrik mulai melanda rumah tangga, pabrik kecil, dan pabrik baja di India.

Kondisi ini terjadi ketika persediaan batu bara di banyak pembangkit listrik merosot, sementara permintaan listrik melonjak akibat cuaca yang lebih panas dan penurunan tajam produksi listrik tenaga air.

Permintaan listrik yang melampaui pasokan dalam beberapa pekan terakhir memicu pemadaman di sejumlah wilayah, termasuk bagi rumah tangga, pabrik kecil, dan fasilitas peleburan logam, Bloomberg melaporkan pada Senin.

This situation has forced barge operators to reduce their loads, further delaying coal shipments.

Price pressure is expected to continue as China's coal consumption typically increases during the winter.

Meanwhile, liquefied natural gas (LNG), an alternative fuel for power generation, has also seen its price surge throughout the year. The Middle East conflict has hampered Qatar's supply due to disruptions to shipping routes through the Strait of Hormuz.

From Europe, European coal futures contracts reportedly reached their highest level in more than two years. The November API2 contract rose to US\$146.80 per ton. Meanwhile, South African coal prices also strengthened, driven by strong demand from Asia and limited supply availability for near-term delivery.

Chinese buyers have been actively seeking supplies again after the Golden Week holiday, submitting new purchase orders. However, high coal prices continue to limit demand.

India Cuts Power

Supply problems also hit India.

Power outages have begun to hit households, small factories and steel plants in India.

This situation occurs when coal supplies at many power plants are declining, while electricity demand is soaring due to hotter weather and a sharp decline in hydro-electric power production.

Power demand has outstripped supply in recent weeks, triggering blackouts in several areas, including for households, small factories and metal smelting facilities, Bloomberg reported Monday.

Fenomena El Niño yang kuat menyebabkan musim monsun India menjadi yang terlemah dalam satu dekade, sekaligus mendorong suhu melampaui rata-rata normal untuk periode ini. Kondisi tersebut menekan pasokan listrik ketika minimnya curah hujan mengurangi produksi listrik tenaga air dan stok batu bara di puluhan pembangkit listrik tenaga uap (PLTU) mencapai level kritis.

Data pemerintah pada akhir September menunjukkan, proporsi PLTU yang memiliki persediaan batu bara sangat rendah melonjak dalam beberapa pekan terakhir hingga melampaui 40% dari seluruh pembangkit batu bara yang beroperasi.

Pada 1 Oktober, sebanyak 85 pembangkit tercatat memiliki stok batu bara di bawah 25% dari kebutuhan normalnya.

Hal ini menunjukkan tekanan yang semakin besar terhadap rantai pasokan batu bara, menurut analisis triwulanan sektor kelistrikan India periode Juli-September 2026 dari Centre for Research on Energy and Clean Air (CREA), lembaga riset yang berbasis di Finlandia.

El Niño yang kuat dan cuaca lebih panas semakin membebani pasokan batu bara India. Pembangkit listrik kini membakar batu bara lebih cepat di tengah rendahnya produksi listrik tenaga air dan lonjakan permintaan listrik.

Tekanan terhadap stok batu bara dan pembangkitan listrik mulai berdampak pada aktivitas ekonomi, menurut sejumlah pelaku industri kepada Bloomberg.

Pabrik-pabrik baja skala kecil di Chhattisgarh, India tengah, menghadapi pemadaman selama 10 hingga 12 jam per hari. Kondisi tersebut memaksa mereka mengurangi produksi, kata Manish Dhupad, Sekretaris Jenderal Chhattisgarh Mini Steel Plant Association, kepada Bloomberg.

Pemadaman listrik juga meningkatkan biaya energi bagi pabrik dan produsen baja karena mereka harus beralih menggunakan generator berbahan bakar mahal.

A strong El Niño phenomenon has caused India's weakest monsoon season in a decade, pushing temperatures above the normal average for this period. This situation has put pressure on electricity supplies as the lack of rainfall has reduced hydroelectric power production and coal stocks at dozens of coal-fired power plants have reached critical levels.

Government data from late September showed that the proportion of coal-fired power plants with very low coal inventories had surged in recent weeks to exceed 40% of all operating coal-fired power plants.

As of October 1, 85 power plants were recorded as having coal stocks below 25% of their normal needs.

This indicates growing pressure on the coal supply chain, according to a quarterly analysis of India's power sector for the July-September 2026 period from the Centre for Research on Energy and Clean Air (CREA), a Finland-based research institute.

A strong El Niño and warmer weather are further straining India's coal supply. Power plants are now burning coal at a faster rate amid low hydroelectricity production and surging electricity demand.

Pressure on coal stocks and power generation is starting to impact economic activity, industry players told Bloomberg.

Small-scale steel mills in Chhattisgarh, central India, are facing 10- to 12-hour power outages per day, forcing them to reduce production, Manish Dhupad, secretary general of the Chhattisgarh Mini Steel Plant Association, told Bloomberg.

Power outages also increase energy costs for steel mills and producers as they have to switch to expensive fuel-burning generators.

Rumah tangga turut terdampak. Di Uttar Pradesh, negara bagian dengan populasi terbesar di India yang dihuni lebih dari 240 juta orang, sejumlah desa mengalami pemadaman listrik hingga tujuh jam sehari. (mae/mae)

Households were also affected. In Uttar Pradesh, India's most populous state with over 240 million people, some villages experienced power outages of up to seven hours a day. (mae/mae)



Metso expands distributor partnership with KrossKonsult in Norway

Published by Jody Dodgson, Editorial Assistant

METSO has expanded its long-standing partnership with KrossKonsult AB and its Norwegian subsidiary, KrossKonsult Norway AS, to further strengthen equipment availability and customer service for the aggregates market in Norway.

Effective 1 January 2027, KrossKonsult will serve Metso's aggregates contractor customers in Norway, providing local support, technical expertise, and access to Metso's industry-leading crushing and screening equipment, spare and wear parts.

"Customers are at the centre of everything we do. By expanding our cooperation with KrossKonsult in Norway, we can provide contractor customers with strong local expertise, fast response times, and high-quality services throughout the equipment lifecycle. The agreement will further develop our aggregates business and bring us closer to customers in the Norwegian market," says Roar Vasboe, Vice President, Sales & Services, Nordics at Metso.

KrossKonsult specialises in crushing, screening, and material handling solutions. Founded in 1997, the company has built a strong reputation in the Nordic aggregates industry through its technical expertise and customer-focused approach.

"This agreement is an important step in strengthening our partnership with Metso and growing our presence in Norway. By combining Metso's leading technology with our local expertise and service capabilities, we can support customers with reliable solutions and a seamless transition while helping them maximise productivity and performance," says Kristofer Almèn, Deputy Managing Director at KrossKonsult. 



Global Coal Demand Rises as LNG Shortage Deepens

By Irina Slav

LIQUEFIED natural gas flows from the Persian Gulf are still over 75% lower than they were before February 28th. Yet heating demand is rising ahead of winter. In Europe, the November natural gas benchmark contract is trading at over 81 euros per MWh.

In Asia, the spot market LNG price topped prices for Europe, drawing cargoes eastward. Meanwhile, coal is 80% cheaper than LNG.

Coal has been the target of much climate-related regulation on the basis that it emits the most carbon dioxide plus pollutant gases and particulate matter. Yet coal has remained a fixture of the global energy system because of its affordability, availability, and reliability. Even so, global oil exports have recently been on the decline, driven lower by the abovementioned regulation, which has made it more expensive to generate electricity from coal in many parts of the world—but then the U.S. and Israel attacked Iran, starting a war that has wreaked havoc on gas trade.

In September, the International Energy Agency said it expected demand for coal this year to rise to an all-time high—despite the net-zero push that the IEA is very much in favor of, despite the surge in LNG export and import capacity, and despite the closure of many coal power plants in Europe and North America. Coal-buying is set for an especially strong fourth quarter of the year, as peak demand season begins.

Until this month, coal exports globally were on track for an annual decline, Reuters' Gavin Maguire wrote last week, but the current quarter could change this. In fact, it is almost certain the current quarter will change this: Australian thermal coal is trading at a discount of 80% to LNG for delivery in Asia, where the spot price for November cargoes topped \$26 per million British thermal units, up from \$25.25 per mmBtu earlier this week.

"Asian demand remains price-sensitive, with Chinese buyers particularly unlikely to chase spot cargoes unless prices mean revert, and that is currently unlikely," Davenport Energy managing partner Toby Copson told Reuters earlier this month.

The reason this is not likely to change is that LNG cargoes out of the Strait of Hormuz are still much fewer than they were before the war started. While tanker-tracking outlets report an improvement in LNG flows out of the Middle East in September, even improved, the flows are much lower than pre-war averages.

In September, 21 LNG cargoes are estimated to have exited the Strait of Hormuz, the highest monthly number since the Iran war began, yet down from over 60 before the war, shipping data compiled by Reuters and released earlier in October. The reason, besides the extended force majeure that QatarEnergy has in place for its LNG industry, is the increased frequency of tanker attacks in the waterway. Over the last two weeks alone, there have been as many as 20 attacks on vessels in the Persian Gulf, most of them tankers, including LNG carriers.

Coal, meanwhile, is not anyone's target. Australian benchmark coal is trading at the equivalent of \$5.40 per mmBtu, which would make any government reconsider its energy transition plans favoring liquefied natural gas, which is trading at \$26 per mmBtu—as long as that government has not shut down its coal power plants, of course.

This is especially true of the world's biggest energy importers, namely Japan, South Korea, and China. Reuters' Maguire reports, citing Kpler data, that these three imported a collective 122 million tons of coal during the third quarter of this year. Third-quarter demand for coal is driven by summer heat and cooling demand, but heating demand trumps that: Japan, China, and South Korea were importing coal at a rate of 143 million tons per quarter in both the last three months of 2024 and of 2025—and that was before the war.

Yet coal imports are also rising in the most anti-coal part of the world: Europe. With the war driving gas prices to highs last seen in 2022, and with the European Union reducing its choice of suppliers with its ban on Russian energy commodity imports, coal imports into the bloc that covers most of the continent have risen strongly this year, with the June total, for instance, up by 43% on the year.

It was at this point in time that the world's largest coal exporter, Indonesia, decided to pursue production quotas and policy tweaks in coal that saw its exports drop by as much as 23% in August. The IEA expects the country's coal production to decline this year by over 12 million tons, citing lower production quotas and political discussions about revenue-sharing arrangements with mine operators and the possibility of moving export control to a single state-owned entity. This could drive coal prices higher during peak demand season, but here's the thing: coal prices are quite unlikely to ever come close to LNG prices. By Irina Slav for Oilprice.com

THE ECONOMIC TIMES

Gold subdued with spotlight on US inflation data

By Reuters

GOLD prices were subdued on Tuesday, with market focus on upcoming US inflation prints for fresh signals on the Federal Reserve's interest-rate trajectory.

Spot gold was down 0.2% at \$4,161.81 per ounce by 0015 GMT after hitting a one-week peak in the previous session.

US gold futures for December delivery fell 0.1% at \$4,186.60.

The US dollar lingered near an 18-month high, making dollar-denominated metals more expensive for holders of other currencies.

Markets are awaiting the Consumer Price Index (CPI) due on Wednesday and the Producer Price Index (PPI) report scheduled for release on Thursday.

Cleveland Fed President Beth Hammack said the US central bank should move "relatively quickly" to a restrictive monetary policy stance in order to control inflation she feels has become more broad-based and is starting to influence firms' price-setting plans.

The Fed is widely expected to keep rates on hold this month, but markets assign an 88% likelihood of a rate hike in December, according to CME's FedWatch tool.

When interest rates are elevated, investors typically gravitate toward yield-bearing assets rather than gold.

On the geopolitical front, Saudi Arabia said it was facing a new barrage of incoming fire and that Riyadh airport would remain shut for now, days after Saturday's deadly missile strike on a departure terminal that was claimed by Yemen's Iran-allied Houthis.

Among other metals, spot silver eased 0.4% to \$60.09, platinum was down 0.3% to \$1,680.95 and palladium fell 0.7% to \$1,135.70. 

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China coal prices at three-year high with little relief in sight

Bloomberg News

CHINA's thermal coal prices climbed to a three-year high as sluggish domestic production growth and disruptions in top exporter Indonesia coincide with an energy rally driven by the US-Iran war.

The benchmark power-station coal price hit 1,004 yuan (\$150) a ton on Monday, according to the China Coal Transportation and Distribution Association, the first time it's been at four figures in two years. Prices have risen by a quarter since mid-July

Coal remains China's main electricity feedstock, accounting for around half of the country's power mix, even after a rapid buildout of renewable energy over the past few years. Domestic output of the fossil fuel is down more than 3% in the year through August from the same period in 2025 due to a ramp up of safety measures following a deadly mine collapse in Shanxi province in May.

The market had been counting on Shanxi to restore about 31 million tons of annualized production by year-end, but approval of restart applications has lagged behind expectations, according to a local coal news provider. Authorities are likely to maintain a cautious stance ahead of a major Communist Party meeting later this month, limiting the scope for any immediate relaxation of safety controls.

Meanwhile, three weeks of maintenance on China's main coal rail corridor through Oct. 26 is set to keep prices high.

On top of the domestic problems, shipments from Indonesia, China's major overseas supplier of thermal coal, have fallen sharply this year as Jakarta moved to curb output to revive prices and boost state revenues. More recently, a drought linked to the El Niño weather pattern has lowered water levels in rivers in key coal regions of the country have, forcing barge operators to reduce loads.

China's consumption of coal typically rises over the winter months, which should keep upward pressure on prices. Alternative power-generation fuel liquefied natural gas has also surged this year as the Middle East war trapped Qatari production behind the Strait of Hormuz. 🌐

Australian Mining

WA commits more than \$6 million to uncover new mineral deposits

By Jackson Haddad

MORE than \$6 million in co-funded drilling grants have been awarded to 40 project in Western Australian, with copper, gold and critical minerals among the key exploration targets.

The funding of around \$6.16 million, provided through round 34 of the WA government's Exploration Incentive Scheme (EIS), will support 36 applicants exploring prospective and under-explored regions in the state.

Copper features prominently in this round, with around half of the drilling programs targeting the mineral either as a primary focus or within multi-commodity systems.

More than a quarter of applicants are pursuing gold, while 12 projects will target critical minerals including rare earth elements, cobalt, niobium, lithium and tungsten.

Almost two-thirds of successful applicants are based in the Goldfields-Esperance and Pilbara regions.

WA mines, petroleum and exploration minister Daniel Pastorelli said the scheme helped explorers pursue opportunities that might otherwise remain undeveloped.

"That support is particularly important in remote and under-explored parts of the state, where the potential rewards can be significant though the risks are often higher," Pastorelli said.

"It's encouraging to see such a diverse range of projects being pursued through this round, reflecting the depth and resilience of WA's resources sector."

Recent EIS success stories include Black Canyon, whose drilling confirmed manganese mineralisation over a 3km strike and contributed to a maiden mineral resource estimate.

Co-funded drilling has also returned encouraging gold results for Ausgold Exploration, Great Boulder Resources and Cosmo Metals, according to the state government.

Pastorelli said WA accounted for around 68 per cent of national mineral exploration expenditure and was home to almost 60 per cent of the country's exploration companies.

"When exploration succeeds, so too does WA which is why investing in early-stage discovery remains so important to continue to grow our economy and create more jobs," Pastorelli said. 🇮🇩

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Ethiopia launches its first gold refinery, Prime Minister says
Reuters

ETHIOPIA has launched its first gold refinery, a \$50 million joint venture aimed at turning the East African nation into a regional processing hub for precious metals, Prime Minister Abiy Ahmed said over the weekend.

Gold exports are one of Ethiopia's main sources of foreign exchange, earning the country \$5.6 billion last year, according to government data.

Abiy said the new refinery would process gold from Ethiopia and elsewhere.

"It enables neighbouring countries and regional mining companies to bring their gold to Ethiopia for advanced refining, certification, value addition, and sale, eliminating the need to export it outside the continent," Abiy Ahmed said in a post on social media platform X on Saturday.

The refinery will provide services including melting, testing, refining, casting, bar minting and die-making.

The initial investment in the refinery is \$50 million, with state-owned Ethiopian Investment Holdings taking a majority stake, Abiy said.

(Reporting by Dawit Endeshaw; Editing by George Obulutsa, Kirsten Donovan)