THE COAL HARD TRUTH

A Public Awareness Campaign

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POLICYMAKER'S ISSUE KIT

Facts and Responses for a More Measured, Analytical, and Moral Approach to Our Nation's Energy Policies

CORE
Natural Resources

Issue #1

RENEWABLES REPORT CARD

The promise of renewable energy has been cited long enough to warrant an objective review of how well its claims have been realized. By any reasonable measure, the report card has received a failing grade.

TALKING POINTS

- **Renewables represent a very weak cost benefit ratio**
  After spending trillions globally on renewable and other clean energy technologies over the past 20 years, as of 2025, fossil fuels still provided approximately 86% of the world's total energy.[1] Over this same time period, the overall use of fossil fuels around the world has continued to increase, and global coal demand reached another all-time high in 2025.[2] If the goal has been to greatly reduce dependence on fossil fuels, this is a stunning failure and very poor return on investment.

- **Demand for fossil-based energy continues to increase**
  For instance, worldwide demand for coal reached a record high in 2025, reaching approximately 8.85 billion metric tons for the first time in history, despite efforts to reduce its usage.[3]

- **Renewable energy is not carbon-free**
  Building the massive infrastructure needed for renewable power generation will require an enormous investment. One megawatt of onshore wind capacity, for example, requires hundreds of tons of steel and concrete, itself requiring hundreds of tons of coal.[4][5][6] According to the International Energy Agency (IEA), to reach renewable energy goals, the supply of materials like lithium, graphite, and nickel will need to increase by 4200%, 2500%, and 1900%, respectively. The mining and industrial activity involved in extracting these minerals will require enormous amounts of fossil fuels to be mined, processed, and transported.[7]

- **Renewables require much more land than fossil fuels**
  The buildout necessary to achieve renewable energy goals will require new transmission lines, charging stations, wind turbines, solar farms, and battery storage facilities – all of which will require increased land use. By some estimates, renewables will require 10 times more land area than fossil fuels per unit of power produced. This means deforestation, increased mining, and other activities that are not as environmentally friendly as the proponents of renewables assert.[8][9][10]

QUESTIONS TO PREPARE FOR



Isn't transitioning to renewable energy much better for the environment?

Not when the transition itself will create more emissions, more mining, and more land use, that could be better used for agriculture, forestry, and plantings that naturally mitigate CO_2 levels in the atmosphere. Renewables like wind and solar are located in remote areas, far from established transmission lines. The reality behind connecting renewables to the grid now in place translates into the vastly more expensive, impractical, and environmentally questionable costs incurred.

Aren't renewables easy to bring online?

No, it's not plug-and-play. For solar and wind to provide the majority of U.S. electricity by 2035, the existing transmission capacity may need to triple in size to bring remote solar and wind power to the grid. That could mean installing up to 10,100 new miles of transmission lines each year, starting in 2026. [11] Comparatively, only about 5,000 circuit miles of transmission projects entered service in the U.S. in 2024.[12]

BOTTOM LINE

Many of the goals established for renewable energy remain aspirational at best, and will take decades to become a realistic solution. So far, renewables have earned a failing grade.

Sources:

[1] IER: *Fossil Fuels Dominate Global Energy Supply in 2025.*
[2-3] IEA: *Coal 2025.*
[4-6] U.S. Department of Energy, National Renewables Energy Laboratory: *Renewable Energy Materials Properties Database: Summary* (August 2023).
[7] IEA: *The Role of Critical Minerals in Clean Energy Transitions.*
[8] Dave Merrill, Bloomberg: *The U.S. Will Need a Lot of Land for a Zero-Carbon Economy.*
[9] North American Electric Reliability Corporation: *2022 Long-Term Reliability Assessment.*
[10-11] Kevin Rackstraw, Coho: *No Transmission, No Transition: Delivering Clean Energy Depends On A Modernized Grid.*
[12] Federal Energy Regulatory Commission: *2024 State of the Market Report.*

Issue #2

IMPACT ON NATIONAL SECURITY

The appeal of renewables as a way to save the world ignores or minimizes the very real dangers and disadvantages such a strategy poses to the security and continued economic progress of the United States.

TALKING POINTS

- **Grid stability threatened**
  The reliability of our power grid is critical to our most basic needs for survival. Our homes, schools, hospitals, businesses, industries, and governments all stop functioning without a steady flow of electricity. But, to reach established net-zero goals by 2050, fossil-fuel power plants are being retired much faster than dispatchable and dependable replacement sources are being developed.[1]

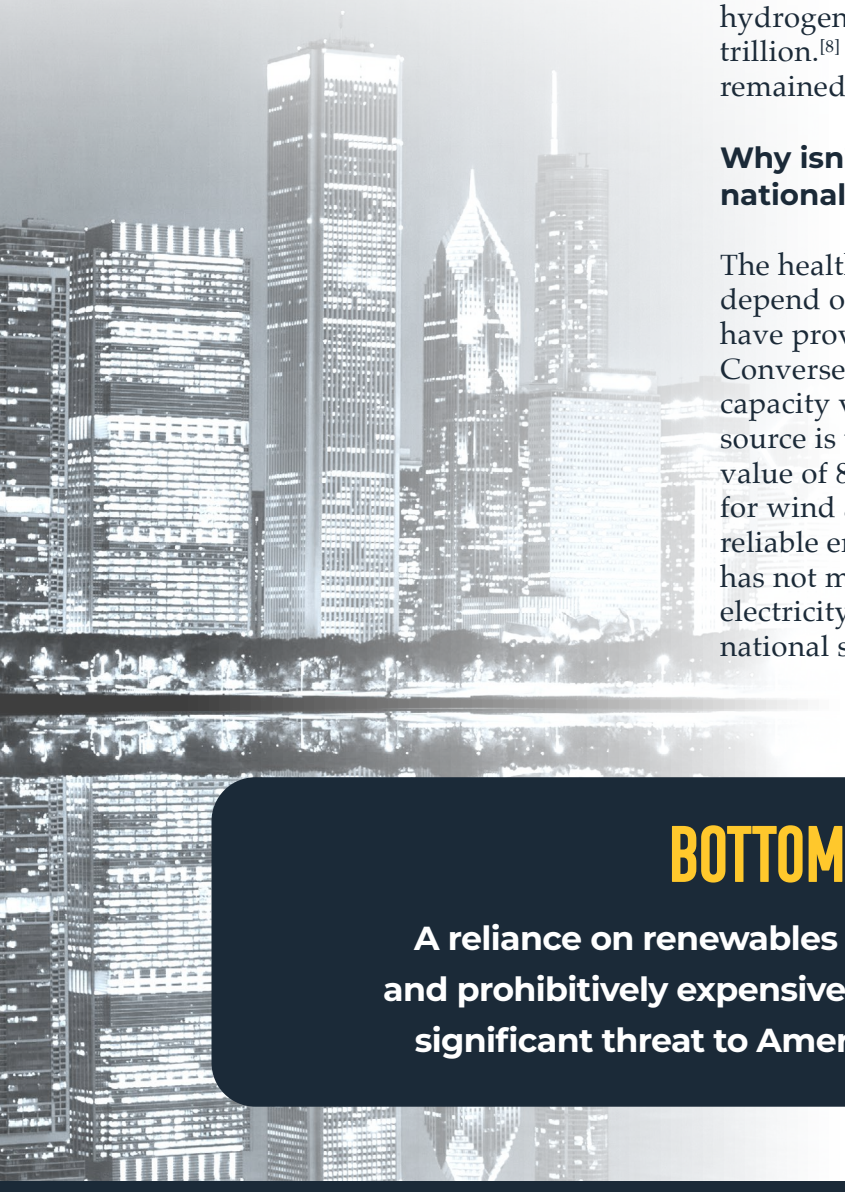
- **Expert warnings issued**
  The U.S. coal fleet totaled approximately 170,000 megawatts (MW) of electric generating capacity at the end of 2025. Although utilities initially planned to retire 8,500 MW during 2025, only 2,600 MW retired after several planned closures were delayed or canceled. Utilities currently plan to retire another 6,400 MW in 2026, making it imperative to act to prevent a grid reliability crisis.[2] North American Reliability Corporation (NERC), the Federal Energy Regulatory Commission (FERC), grid operators, and state public utility commissions have issued dire warnings regarding premature coal retirements and the possibility of such a crisis.[3]

- **U.S. energy independence weakened**
  Transitioning to a renewable energy future significantly diminishes our national security and energy independence. Moving to a renewable-dominant electrical grid will greatly increase U.S. dependence on foreign nations, many of which have lower standards of safety and sustainability. China, for example, controls roughly 90% of the market for refining rare earth minerals critical to the production of electric vehicles and renewable battery technologies.[4] Such dependence is irresponsible.

- **The day of energy inflation reckoning is coming**
  By government subsidizing renewable energy, the natural laws of supply and demand are being bypassed artificially. As a result, the effects of inflation due to renewable energy have yet to be fully experienced in the marketplace, but they will, eventually. Taxpayer-funded subsidies and other government financial support for clean energy have totaled trillions of dollars, but fossil fuels still provide approximately 80% of the world's total energy.[5] These inflationary pressures will be felt across the U.S. economy.

- **The rising tide of energy inflation**
  As energy markets continue to be circumvented with artificial subsidies and incentives for weaker renewables, the full consequences of energy inflation looms large. However, we might not be waiting long to experience the results. PJM, a large Regional Transmission Organization (RTO), held a power capacity auction in July 2025, resulting in a price of $329.17 per megawatt-day, more than 1,000% higher than the $28.92-per-megawatt-day price recorded just two auctions earlier. PJM's next auction, held in December 2025, produced an even higher price of $333.44 per megawatt-day.[6] Capacity auctions are mandated events that balance consumer pricing protections with market reliability, capacity, and transmission considerations. PJM's July auction provides clear evidence that moving away from affordable fossil fuels—and rushing too quickly to intermittent and low-capacity renewables—will drive significant energy inflation and, someday soon, could have a devastating impact on the U.S. economy.

QUESTIONS TO PREPARE FOR



Why do fossil fuels assert an ability to provide a competitive advantage to the U.S.?

Coal is the indispensable American resource. Affordable, abundant, and dispatchable, coal has enormous reserves in the U.S., enough to safely and cost-efficiently power the economy far into the future. On the other hand, according to the Electric Power Research Institute (EPRI), reaching the stated goal of decarbonizing the grid by 2035 would require 900,000 MW of new wind and solar power, 80,000 MW of new nuclear capacity, and 200,000 MW of hydrogen-fueled turbines,[7] at a combined cost of $1.7 trillion.[8] Meanwhile, the cost of coal for electricity has remained relatively flat for the past 15 years.

Why isn't a transition to renewables a wise national security strategy?

The health, vibrancy, and growth of the U.S. economy depend on reliable and affordable energy. Fossil fuels have proven their ability to provide this for decades. Conversely, renewables have a much lower accredited capacity value, a measure of how dependable an electricity source is when demand peaks. PJM assigns a capacity value of 85% for coal, 77% for natural gas, but only 38% for wind and 13% for solar. Simply put, renewables are not reliable enough – and the infrastructure to support them has not materialized yet – to meet the growing demand for electricity, and therefore pose a risk to the economy and national security.

BOTTOM LINE

A reliance on renewables is not only impractical and prohibitively expensive, it represents a real and significant threat to American national security.

Sources:

[1] PJM Interconnection: *Energy Transition in PJM: Resource Retirements, Replacements & Risks* (Pages 5, 6).
[2] U.S. Energy Information Administration: *Energy Outlook April 2026.*
[3] North American Electric Reliability Corporation: *2018 Long-Term Reliability Assessment.*
[4] IEA: *The Role of Critical Materials in Clean Energy Transitions.*
[5-6] PJM: *Annual Report 2025*
[7-8] America's Power: *Coal Facts.*

Issue #3

HUMAN RIGHTS & GLOBAL POVERTY

Coal stands as the essential source of energy for the world. It is responsible for lifting economically disadvantaged nations into participation in the global economy, establishing a higher standard of living and enabling a deeper commitment to human rights the world over.

TALKING POINTS

- **Coal is the most abundant source of electricity worldwide**
  Coal provides approximately 34% of the world's electricity and remains the world's largest source of electricity generation.[1] Coal is also one of the most affordable and available energy sources on earth. Coal produces 58% of China's electricity and approximately 75% of India's, providing a higher standard of living for the nearly 3 billion people living in those two nations.[2] The people there have every right to advance as they see fit. Their situation centers more on acquiring the basic needs of survival, with environmental concerns not ranking quite as high.

- **Coal represents a prime means of economic growth for developing countries**
  With approximately 655 million people in the world still without electricity, the need for abundant, affordable coal is obvious.[3] Without coal to provide electricity, developing countries will struggle to rise from poverty and improve their quality of life.[4] Denying these populations of affordable energy would have severe ethical and moral consequences.

- **Non-fossil fuel sources are impractical**
  Many emerging nations cannot afford the cost or resources required to adopt modern and more costly – not to mention less reliable – sources of energy, like nuclear or renewables. Instead, these nations need to be practical and realistic, working to establish a consistent and economical baseline of energy production and distribution – which means using coal to walk before they can run.

- **Coal is a central component of basic infrastructure**
  Coal is a vital raw material for making steel and cement, two of the most necessary and prevalent construction materials in the world. Roads, buildings, bridges, sewers, railroads, cell towers, dams, and basic infrastructure in general are only possible with the help of coal. Developing nations need to build their infrastructures to participate in the global economy, which means they need access to plentiful and affordable coal.

QUESTIONS TO PREPARE FOR

Isn't it morally wrong to rely on fossil fuels in the developing world?

To the contrary. Developing nations have a moral right to realize the tremendous societal and economic benefits of fossil fuels – benefits that far outweigh the consequences of not using fossil fuels as a proven and essential driver of economic development and a higher standard of living for all people.

Does having U.S. based companies supply fossil fuels to the developing world mean the U.S. is abandoning its leadership role in addressing CO2 emissions?

No. While the U.S. accounts for only approximately 12% of global energy-related CO_2 emissions [5], the fact remains that greenhouse gas emissions are prevalent all over the world. These challenges will continue to require comprehensive study and solutions, but the immediate need for developing nations to build their infrastructures and economies is even more pressing. If not done responsibly, it could condemn millions to crushing poverty without hope.

BOTTOM LINE

To enable a greater commitment to human rights, and to lift developing nations out of poverty, coal must be an essential player worldwide. The benefits of coal obviously far outweigh the potential negatives of emissions.

Sources:

[1-2] Energy Institute: *Statistical Review of World Energy 2025.*
[3] World Bank Group: *Energy.*
[4] World Coal Association: *Coal–Energy for Sustainable Development.*
[5] IEA: *Global Energy Review 2025.*

Issue #4

THE REALITY OF NET ZERO

The changes required to achieve "net zero" goals threaten a number of essential American freedoms, while the increase in the cost of providing energy could slow economic growth significantly.[1] It is not as simple as you might think.

TALKING POINTS

- **Achieving net zero emissions means massive behavioral changes**
  Achieving "net zero" emissions goals by 2050 will require much more than reducing reliance on fossil fuels. Scenarios modeling these incredibly aspirational goals include a daunting number of serious and alarming lifestyle changes[2] being considered by governments worldwide, such as:
  - Restrictions on travel
  - Imposed ridesharing in urban areas
  - Lower speed limits on major highways
  - Regulation of thermostats in homes, offices, and other structures

- **Achieving net-zero will require massive increases in materials mining**
  A decrease in coal mining, as fossil fuel usage to generate electricity is lessened, will lead to a massive increase in the mining of other materials, mostly in nations with lower environmental and workplace standards than the U.S. Such mining operations would need to increase between 400% and 4,000% over the next two decades.[3] Plus, mining operations take an average of 16 years to ramp up and produce results, further adding to the impracticality of relying on renewables.

- **Renewables trigger significant energy inflation**
  Energy security equates to national security, because the entire economy requires affordable, reliable, and easily accessible electricity. U.S. residential electricity costs have risen over the past 20 years.[4] Those rates should have declined because of the flat cost of natural gas and coal, which together supplied nearly 70% of electricity during that period.[5] Instead, electricity rates have gone up due to renewable infrastructure spending. Imagine if the trillions spent on renewable energy – with astoundingly poor returns on that investment – had instead been spent on further abating existing fossil fuel-based energy sources.

- **Decarbonization is a worthy process, and much progress has already been made**
  CO_2 emissions from the U.S. are only approximately 12% of the world's energy-related total, thanks to efforts made by many parties, including American utilities.[6] Abated coal technologies will continue to play a critical role in the ongoing transition to more sustainable forms of energy, working with renewable sources to provide reliable energy while protecting our climate and meeting our energy needs.[7][8][9]

QUESTIONS TO PREPARE FOR



Why doesn't the fossil-based fuel industry care more about emissions reduction?

The fact is that billions have been spent by the fossil-based fuel industry on research and implementation of clean-coal technologies to reduce emissions, with measurable positive results to date, and more to come. Emissions reduction consistently polls near the bottom of primary concerns to Americans, so in some meaningful ways, the fossil-based fuel industry has demonstrated an outsized level of investment and concern regarding emissions reduction.

Why can't renewables be the exclusive source of energy to reach net zero by 2050?

Moving to a total renewables energy profile is economically and logistically impractical. For instance, the wind industry would need to increase construction of wind energy plants by up to 10 times the current pace, pushing demand for certain materials above current global supplies.[10] The lower reliability of renewable energy sources also could strain the grid now in place, while potentially leading to rolling blackouts. A responsible blending of fossil-based fuels and renewables remains the best option for a long-term affordable and reliable energy future.

BOTTOM LINE

Fossil fuels will continue playing a key role in reducing emissions, working with renewables as justified, to secure a long-term energy future that protects the planet without hampering freedoms or economic growth.

Sources:

[1-2] McKinsey & Company: *The net-zero transition: What it would cost, what it could bring.*
[3] Mark P. Mills, Senior Fellow, Manhattan Institute: *Testimony Before the U.S. House Select Committee on the Climate Crisis.*
[4-5] Mark P. Mills, Manhattan Institute: *The Energy Transition Delusion: A Reality Reset,* August 2022.
[6] IEA: *Global Energy Review 2025.*
[7] World Coal Association: *Coal–Energy for Sustainable Development.*
[8] Scott Foster, David Elzinga, United Nations: *The Role of Fossil Fuels in a Sustainable Energy System.*
[9] IEA: *World Energy Outlook 2022, Page 417,* Figure 9.3.
[10] U.S. Department of Energy National Renewable Energy Laboratory: *How Do We Inventory the Materials Needed to Build Wind and Solar Farms.*

Issue #5

COAL REMAINS ESSENTIAL BEYOND ENERGY

The narrative that coal has reached the end of its useful life could not be more incorrect. In 2025, thermal coal provided 33% of global electricity production[1], with demand for non-energy-related coal continuing to rise. Coal remains the world's essential material.

TALKING POINTS

- **Infrastructure – Steel and Cement**
  Currently 75% of global steel production requires coal,[2] while 71% of global steel production uses metallurgical coal as a feedstock.[3] A 46% increase in steel production has been projected by 2030 to meet increased demand and to support a net zero economy by 2050.[4] Market demand is especially robust in India and Southeast Asia, where 80% of new steelmaking capacity can be found.[5]

  Coal provides around 90% of the energy consumed by cement plants around the world. Experts estimate a 48% projected growth in global cement demand by 2050,[6] with 75% of global cement demand found in Canada, Turkey, Greece, and Mexico.[7]

  The number of structures around the world can reasonably be expected to increase by the end of the century, meaning demand for coal needed for steel and cement should remain strong.

- **Commercial and Consumer Products**
  Coal serves as a key element in building materials, paper production, chemical and pharmaceutical products, fertilizers, and more. Chemical manufacturers use refined coal tar to produce creosote oil, naphthalene, phenol, and benzene. Ammonia gas recovered from coke ovens gets used to manufacture ammonia salts, nitric acid and agricultural fertilizers.

  Coal contributes to the production of consumer and public health-related items, such as: activated carbon (water/air purification, kidney dialysis); carbon fiber, a strong light-weight reinforcement material used in construction, airplane, and automobile manufacture; carbon foam, and commercial product markets; and silicon metal, used to make lubricants, water repellents, resins, cosmetics, hair shampoos and toothpastes.

- **Advanced Materials**
  Abundant coal and carbon resources contribute to high-performance advanced materials in aerospace, military, battery storage, building materials, and other applications, moving society forward into greater efficiencies and sustainability.[8]

  Carbon from coal enhances energy density, battery cycle life, recharging times, and materials sourcing, advancing toward a more robust energy policy. Also, combining coal byproducts with recycled plastics yields high-performance, low-cost, aesthetically pleasing building products like composite decking, offering improved sustainability over traditional materials, while meeting all international building codes.

QUESTIONS TO PREPARE FOR



Has the coal market plateaued?

Not likely. In fact, global coal production in 2025 reached approximately 9 billion metric tons, an all-time record.[9] Much of these metrics are being driven by an exploding demand for coal in all of its varied uses in China, India, and Indonesia.[10] These facts illustrate that the harvesting and use of natural resources flow upward and become the many millions of products we consume every day, boosting economies worldwide.

Why are non-energy applications of coal important?

In under-developed parts of the world, improving the standard of living requires construction of new, or improvements to existing, infrastructure. Coal is needed to produce the steel, cement, and the scores of additional industrial and consumer products that feed into this higher standard of living.

BOTTOM LINE

Market demand for coal – both thermal for energy production, and in scores of non-energy-related applications – continues to increase worldwide, enabling all nations to elevate the quality of life for their citizens.

Reports of the death of coal have been greatly exaggerated. Because of its multiple critical uses, coal demand is stronger than ever.

Sources:

[1] IER: *Fossil Fuels Dominate Global Energy Supply in 2025.*
[2] IEA: *Steel Industry Overview (July 11, 2023).*
[3] World Steel Association: *World Steel in Figures 2024 (Crude Steel Production by Process).*
[4] IEA (2023): *Global steel production in the Net Zero Scenario, 2010-2030,* IEA, Paris; License: CC BY 4.0
[5] Global Cement: *Coal for cement: Present and future trends.*
[6] Congressional Research Service: *"Cement: Background and Low-Carbon Production." (November 3, 2023).*
[7] Core Natural Resources: *Sustainability, Commercializing Carbon.*
[8] IER: *Global Coal Use Hits Another Historic Record in 2024 (January 21, 2025).*
[9] IEA: *Coal 2025.*

THE COAL HARD TRUTH

About the Campaign

The COAL Hard Truth is a national awareness campaign dedicated to restoring appreciation for coal's vital place in America's energy and industrial future. Tailored to inform U.S. policymakers, corporate leaders, and the public, the campaign presents data-driven insights that highlight coal's essential role in powering industries, sustaining communities, and supporting continued progress.

As intermittent energy sources struggle to meet growing demand, *The COAL Hard Truth* advocates for a more balanced and rational strategy, one that recognizes coal's enduring value as a reliable and foundational resource. Sponsored by Core Natural Resources, the campaign reinforces coal's critical role in ensuring energy security, economic stability, and American leadership in the global energy landscape.

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