National COAL COUNCIL

JULY 2026 REPORT:

MAXIMIZING THE VALUE OF THE U.S. COAL FLEET

Overview:

The National Coal Council (NCC) advises the Secretary of Energy on coal and related issues. It was reestablished in June 2025. The NCC includes more than 60 members representing various parts of the coal value chain.

The *Maximizing the Value of the U.S. Coal Fleet* report, prepared by the NCC Electricity Subcommittee with input from the entire Council, provides nineteen recommendations to enable the existing coal fleet to help meet rapidly rising electricity demand while promoting grid reliability, affordable electricity, economic growth, and national security.

THE COAL FLEET TODAY	>168 GW	374	37	~13%
	installed capacity	units at 186 plants	states	of U.S. capacity

WHY PRESERVE THESE PLANTS?

Existing coal capacity is ready now

Existing plants can generally be preserved and modernized faster and at lower cost than they can be replaced.

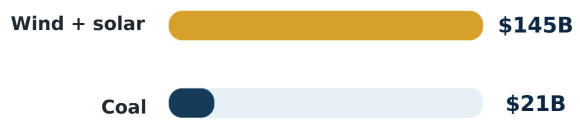
NOW	**Existing coal**	connected, fueled, staffed
4.5+ YRS	**Interconnection**	average request-to-operation time
~7 YRS	**New gas**	current development time

More than 60 GW is scheduled to retire by 2035.

A TILTED PLAYING FIELD

Federal support, FY2010-2023

Federal spending and foregone tax revenue totaled approximately $145 billion for wind and solar, compared with $21 billion for coal



6.9x AS MUCH support went to wind and solar. Coal received the lowest support of the six major generation fuel types.

WHAT THE NCC RECOMMENDS

6 REGULATORY RECOMMENDATIONS
Complete regulatory reforms

- Complete EPA repeal of greenhouse-gas rules and the Endangerment Finding, wastewater-rule repeal and New Source Review reform.
- Have Congress codify EPA reforms to ensure durable regulatory certainty.
- Have DOE work with EPA, FERC, NERC and grid operators to assess reliability impacts.
- Modify plant-retirement agreements that threaten reliability or resource adequacy.
- Streamline coal leasing and permitting and codify durable reforms.
- Simplify historic-preservation reviews for infrastructure, sampling and minor disturbances.

7 MARKET RECOMMENDATIONS
Reform wholesale markets

- Adopt minimum offer price rules across FERC-regulated markets.
- Convert emergency orders into longer-term, properly compensated reliability-must-run agreements.
- Factor dispatchability, on-site fuel and plant upgrades in accreditation.
- Properly value fuel security and compensate coal plants for displaced generation.
- Encourage bilateral contracts and co-location between large users and existing coal plants.
- Use existing infrastructure efficiently and improve large-load forecasting.
- Compensate plants operating at minimum output to maintain reliability.

4 FINANCIAL RECOMMENDATIONS
Modernize the fleet and supply chain

- Increase and streamline DOE grants and loan guarantees for plant modernization.
- Use Department of War contracts to procure coal-fueled electricity.
- Use the Defense Production Act to support domestic equipment manufacturers and coal supply chains.
- Secure leases and permits for plants dependent on specific coal sources.

2 NEW COAL RECOMMENDATIONS
Support new coal development

- Dedicate DOE loan-guarantee authority and establish a competitive grant program to support the development and deployment of new coal power plants.
- Assess the regulatory, legislative and policy barriers impeding new coal development and recommend specific actions needed to eliminate those roadblocks.

IMPLEMENTATION: DOE should monitor and report progress. NCC members stand ready to assist.

Sources: National Coal Council, Maximizing the Value of the U.S. Coal Fleet (2026), pp. 5–8, 14, 25–27; NCC Report FAQ and release, July 21, 2026. Fleet data are as of December 2025; federal support covers FY2010–FY2023.