

# Why the Trump administration wants to make coal a ‘critical mineral’

Experts warn that doubling down on coal without parallel investments in carbon capture or emissions abatement could derail national and global net zero targets.

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President Donald Trump’s embrace of coal marks a sharp break from a decade of US energy policy that cut coal’s share in power generation from around 40 per cent in 2014 to just 15 per cent last year. (Source: AP)

In a bid to boost coal production in the United States, President Donald Trump has designated the carbon-based fuel as a “mineral” and instructed officials to determine whether it meets

the definition of a “critical mineral”.

The Trump administration has also removed red tape around coal mining and scrapped the mandatory use of emissions-control technologies in coal-fired plants, as part of efforts to revive America’s coal industry, which peaked in 2008.

In other parts of the world, too — notably India and China — reliance on coal and thermal power has surged, primarily to balance the grid. In 2024-25, India’s coal production crossed the 1-billion tonne mark for the first time.

Increasing coal production is closely linked to Trump’s ambitions of a manufacturing revival in the US, with a focus on the steel industry. At the same time, the coal push also seeks to help meet the energy requirements of frontier technologies such as artificial intelligence (AI).

Still, Trump’s embrace of coal marks a sharp break from a decade of US energy policy that cut coal’s share in power generation from around 40 per cent in 2014 to just 15 per cent last year.

### **Coal as a critical mineral**

On March 20, the Trump administration put out an executive order defining “minerals” for which extraction projects will be prioritised. Less than three weeks later, on April 8, another executive order added coal to that list.

The order also directed senior officials to examine whether coal used in steelmaking — coking coal — could be formally classified as both a “critical mineral” and a “critical material”.

Under the US Energy Act of 2020, a critical material is defined as a “non-fuel mineral, element, substance, or material,” while a critical mineral is defined broadly as any “mineral, element, substance, or material” that meets the criteria for criticality.

In the US, criticality is defined by whether the material serves an essential role in energy technologies and whether its supply is at a high risk of disruption.

If the US follows through on classifying coal as a critical mineral, it would be among the first countries to do so. The European Union already includes coal in its list of “critical raw materials,” alongside high-demand minerals such as lithium, cobalt, and rare earth elements.

The idea has also gained traction in India. In a recent research report submitted to the NITI Aayog, professor R Srikanth of the National Institute of Advanced Studies called for classifying coking coal as a critical mineral to strengthen domestic supply chains.

## Coal for AI data centres

In one of the four energy-related executive orders issued on Tuesday, the Trump administration also emphasised grid stability as demand for power surges, led by AI data centres. Unlike renewable energy capacities such as solar and wind, which are variable in nature, coal-fired capacities can provide baseload support to the grid at all times.

“Coal is abundant and cost effective, and can be used in any weather condition... Our Nation’s beautiful clean coal resources will be critical to meeting the rise in electricity demand due to the resurgence of domestic manufacturing and the construction of artificial intelligence data processing centers,” the executive order on coal said.

As per the International Energy Agency (IEA), data centre electricity usage could double by 2026, making the challenge for companies to become net zero or carbon negative by 2030 increasingly unattainable.

Companies such as [Google](#) and [Microsoft](#) — with big stakes in the AI game — have also signed deals with nuclear power plants to purchase energy for their data centres.

The focus on ramping up base load capacities like thermal and nuclear comes in the absence of adequate energy storage for renewables. Governments across the world, including the US, are looking at “all available power generation resources, particularly those secure, redundant fuel supplies that are capable of extended operations” to meet surging demand.

### ‘Clean’ coal and what’s next

The resurgence of coal-fired power amid surging global electricity demand cannot obscure a basic fact: coal remains one of the dirtiest fuels in use. While Trump’s executive order labels it “clean”, coal continues to be a leading source of greenhouse gas emissions.

The argument for coal as a stopgap — until large-scale battery storage becomes viable — is not without merit. But it must be weighed against the environmental damage it causes.

Defending the rollback of emissions standards, the executive order argued that the regulations impose “severe burdens” on coal-fired plants by requiring emissions-control technologies that “do not yet exist in a commercially viable form”.

Experts warn that doubling down on coal without parallel investments in carbon capture or emissions abatement could derail national and global net zero targets.



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