



PARTNERS IN COAL.

The Fossil Fuel Ties Behind the COP31
Presidencies of Türkiye and Australia.

←350

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Introduction

COP31 will be the first major UN climate summit since "the biggest energy crisis in history". Türkiye and Australia therefore assume the COP31 co-presidency with a particular responsibility to accelerate the commitment all governments made at COP28: **a just, orderly and equitable transition away from fossil fuels**.

Despite the energy crisis and momentum around the first ever international conference on transitioning away from fossil fuels in Santa Marta **there is a vacuum of action on fossil fuels by Australia and Türkiye which is difficult to separate from their own entrenched fossil-fuel interests and ties**.

This vacuum becomes evident in the general lack of expectation setting and political engagement on the transition away from fossil fuels and becomes most evident in the **three formal COP31 Presidency letters¹ to country delegations setting out the mission and expectations for COP31 published so far not even once containing the phrase "fossil fuels"**.

Both Australia and Türkiye retain substantial domestic fossil-fuel production and consumption and plan substantial further fossil fuel expansion – **and, as this analysis reveals, the two presidencies are themselves connected by a long-standing coal partnership**.

The result is a contradiction at the heart of COP31: the countries charged with advancing the transition away from fossil fuels remain heavily invested in the systems that transition is meant to overcome.

COP31 cannot be a missed opportunity to carry forward the work begun under Brazil's COP30 Presidency: building on its global roadmap for transitioning away from fossil fuels, supporting the development of credible national roadmaps, and building on the Santa Marta process and accelerating the renewable energy transition.

¹First COP31 presidency letter: https://unfccc.int/sites/default/files/resource/Letter%20from%20COP%2031%20President%20Designate_13April2026.pdf

Second COP32 presidency letter: <https://unfccc.int/sites/default/files/resource/JOINT%20LETTER%20FROM%20COP31%20CPD-PON.pdf>

Third COP31 presidency letter: https://unfccc.int/sites/default/files/resource/cop31_3rd_presidency_letter.pdf



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Partners in Coal

Australia, the world's second-largest coal exporter, and Türkiye, the largest coal importer outside of South- and East-Asia, are not simply two fossil-fuel-dependent economies sharing the COP31 presidency: they are among the very few industrial countries (as per the so called Annex 1) **without a coal phase out date**, noting they differ significantly in wealth and historic responsibility for climate change². **Australia and Türkiye are connected by a decades-long fossil-fuel trading relationship, with coal at its center.**

This study shows, based on analysis of UN Comtrade and OECD data, that the two countries leading COP31 are connected by a coal supply chain that has generated more than 75 million tonnes of CO₂ emissions since the Paris Agreement – roughly four times the entire annual CO₂ emissions of Ethiopia, the country due to host COP32 in 2027. This represents only one part of a much wider fossil fuel dependency and a relationship that is expanding to include LNG trade.

Between 2015 and 2025, Türkiye imported **more than 28 million tonnes of coking, thermal and other coal from Australia**, according to trade data from UN Comtrade and the OECD. At a moment when the scientific imperative is to halt fossil-fuel expansion and accelerate the transition away from coal, oil and gas, both COP31 co-presidencies are moving in the opposite direction: **continuing to expand fossil-fuel production, consumption and trade. Furthermore, this decade-long coal trade relationship has recently even expanded to include LNG.**

²Türkiye as an OECD member and upper-middle-income developing country that was placed in Annex I (developed/industrialized countries) at the 1992 Earth Summit, despite having a very low historical share of global greenhouse gas emissions at the time - its special circumstances were hence recognized formally in 2010 in the UNFCCC and its income and emission profile and historic responsibility are clearly lower than that of Australia. Despite this, Türkiye's energy transition policies omit some key responsibilities.

The Fossil Fuel Ties of the COP31 Presidencies

Science is clear: the goals of the Paris Agreement and limiting warming to 1.5C demand a steep reduction in fossil fuels with no expansion. COP31 must advance the transition including enabling conditions and equity components such as new public climate finance flowing from rich countries to developing countries. **COP31's presidencies are meant to lead the world away from fossil fuels. Instead, Australia and Türkiye remain partners in coal – their fossil-fuel interests standing in the way of the leadership this moment demands.**

✱ Türkiye and Australia are connected by a coal supply chain that has generated **more than 75 million tonnes of CO₂ emissions since the Paris Agreement** – roughly **four times the entire annual CO₂ emissions of Ethiopia, the country due to host COP32 in 2027**; between 2015 and 2025, Türkiye imported **more than 28 million tonnes of coking, thermal and other coal from Australia**, according to trade data from UN Comtrade and the OECD.



Ethiopia, host of the COP32 in 2027

TÜRKIYE-AUSTRALIA COAL SUPPLY CHAIN



ETHIOPIA (ANNUAL CO₂ EMISSIONS)





Pacific Climate Warriors call on Australia to phase out coal in line with 1.5C warming goal. © Mark Chen

Year	Coal imports	Estimated CO ₂ emissions
2015	2.793 Mt	7.35 MtCO ₂
2016	2.282 Mt	6.00 MtCO ₂
2017	1.477 Mt	3.88 MtCO ₂
2018	1.970 Mt	5.18 MtCO ₂
2019	2.905 Mt	7.64 MtCO ₂
2020	0.904 Mt	2.38 MtCO ₂
2021	5.324 Mt	14.00 MtCO ₂
2022	3.112 Mt	8.18 MtCO ₂
2023	3.108 Mt	8.17 MtCO ₂
2024	2.760 Mt	7.26 MtCO ₂
2025	1.883 Mt	4.95 MtCO ₂
TOTAL	28.518 Mt	≈75.0 MtCO₂

Table: Coal trade between Australia and Türkiye based on UN Comtrade and OECD data and related average combustion emissions; total lifecycle emissions are expected to be even higher. Numbers may vary slightly due to rounding.

✳ **Türkiye and Australia are among the very few industrial countries (so called Annex-1)³ without a coal phase out date** – COP31 and national roadmaps on transitioning away from fossil fuel production and consumption provide an opportunity to rectify this glaring gap.

✳ **Leading Fossil Fuel Exporter and Importer:**

Australia is the second largest coal exporter in the world in absolute terms as well as the second largest coal exporter per capita, **Türkiye** is the world's 7th largest coal importer and the largest coal importer outside of South- and East Asia.

✳ **Türkiye's and Australia's coal ties are now expanding into gas:** In February 2026 the first LNG tanker from Australia entered Türkiye. While LNG trade between the two countries has been sporadic and insignificant in volume compared to other fossil fuel streams until today, the shipment marks a wider uptake of LNG trade between the two countries. Australian fossil fuel giant **Woodside signed a binding with Turkish BOTAŞ on 29 December 2025,** covering approx. **5.8 bcm natural-gas equivalent,** equal to **0.5 Mt LNG per year,** for **up to nine years starting in 2030.**

While Türkiye's dependency on coal imports has been less exposed to prices hikes due to the blockade of the Strait of Hormuz, **oil and gas import dependency exposes the country to global price shocks and volatility:** According to analysis by 350.org, soaring oil and gas prices driven by the Middle East conflict and the Strait of Hormuz crisis are projected to cost Türkiye's households and businesses between **\$14.05 billion and \$14.79 billion** in extra direct expenses by the end of 2026. If geopolitical tensions remain high, that figure could surge as high as **\$24.59 billion.**



³See footnote 1.



Nurdağı, Gaziantep, Türkiye

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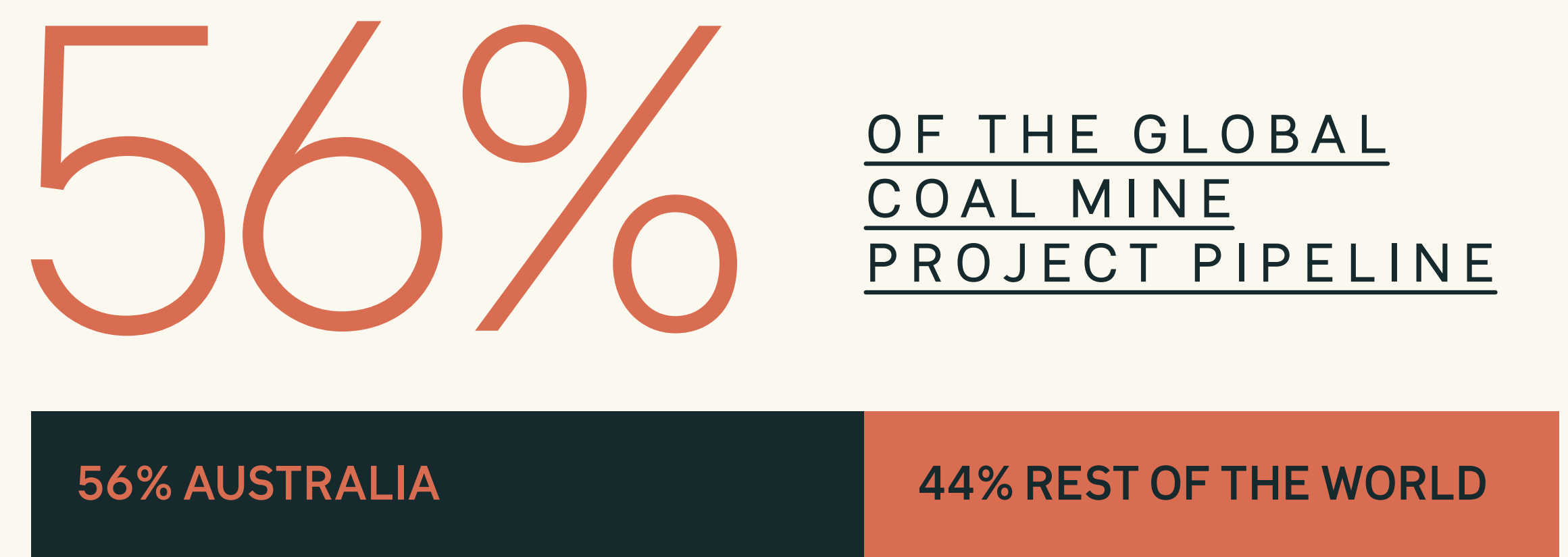
Insufficient climate and energy transition policy: Against the goal of the Paris Agreement, the mitigation commitments and Nationally Determined Contribution (NDC) of both countries fall strongly behind what is needed:

Türkiye has recently expanded its wind and solar energy and announced a net zero target for 2053, but its policies are independently rated as “critically insufficient” by [Climate Action Tracker](#). If the country announces and publishes its updated energy transition plan at COP31, some of these deficiencies could be rectified.

Australia's NDC and overall mitigation policies are [rated as “insufficient”](#) – notably Australia's rating does not even factor in fossil fuel exports and related expansion.

✳ Fossil fuel expansion:

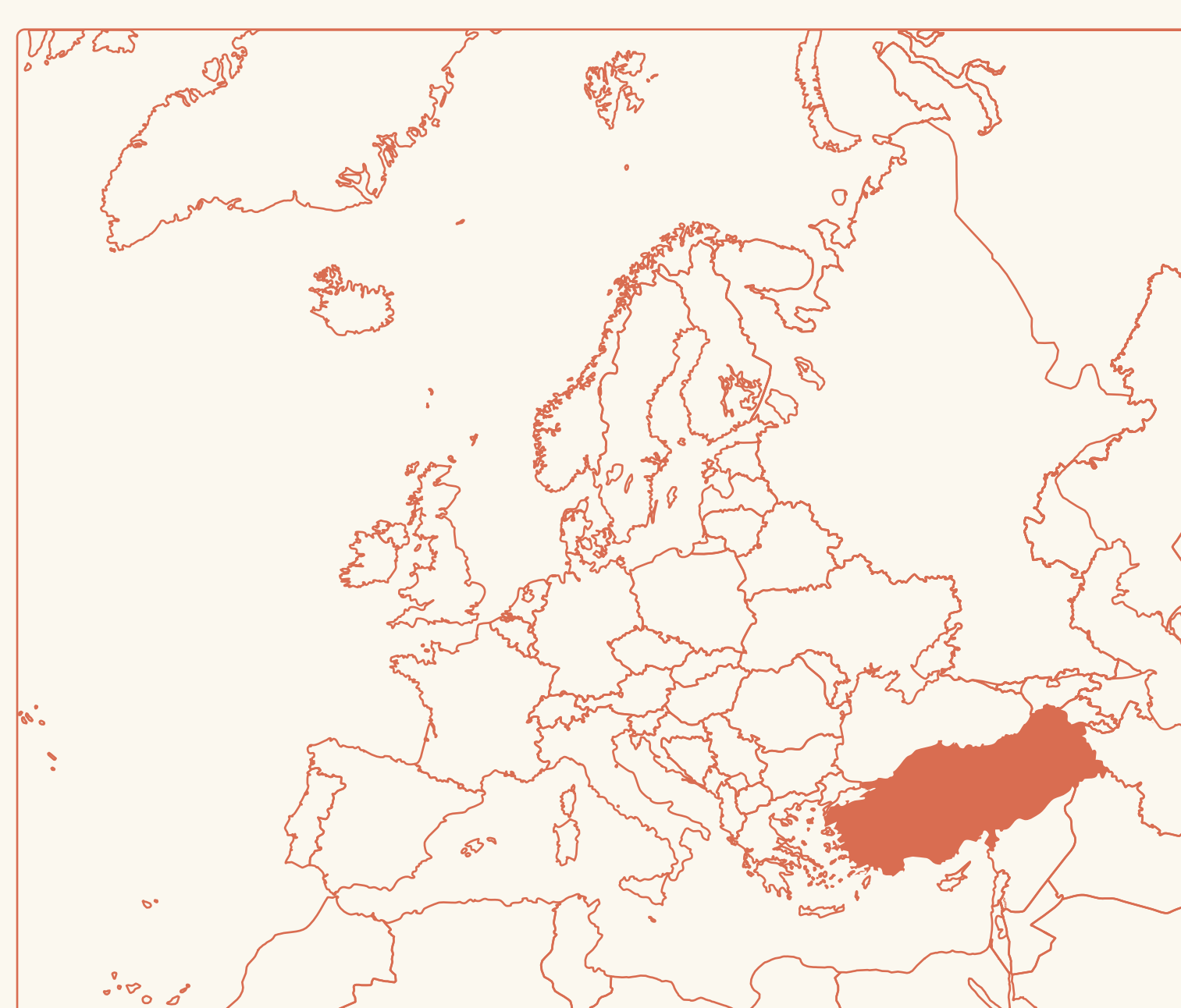
Australia leads among the 15 biggest oil and gas producers with the highest increase in production rate since 2015: its gas and oil output rose by 77%. On coal mining, Australia dominates global expansion and accounts for 56% of the global coal mine project pipeline, an approval pipeline which would produce 1.8 billion tonnes of thermal coal alone from 2025-2050.



Australia, whose COP31 presidency bid relied heavily on support from Pacific nations, has consistently **blocked calls for a region-wide fossil fuel transition** in the interest of protecting its growing coal and gas exports.

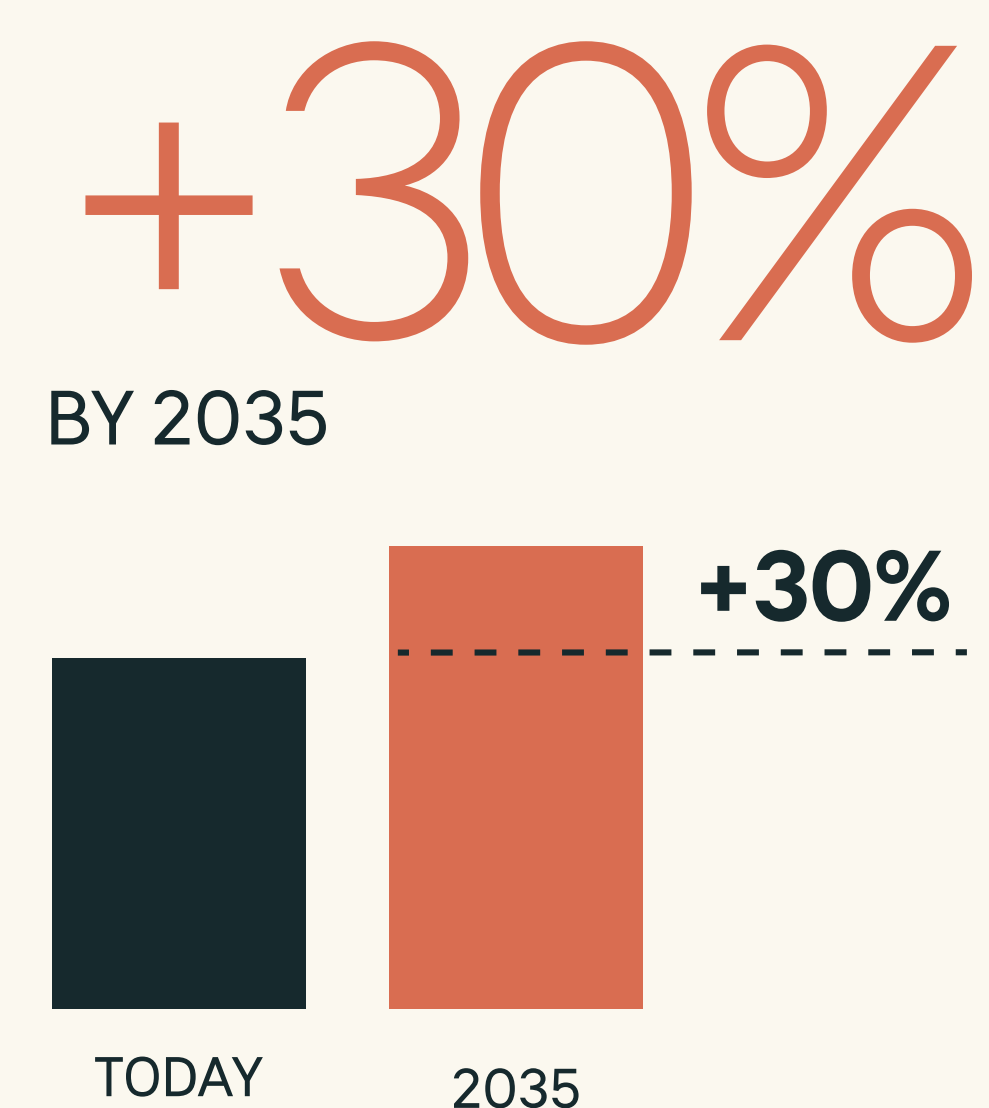
The Australian Government has approved 36 new or expanded fossil fuel projects since Prime Minister Anthony Albanese was elected in 2022.

Türkiye is already Europe's biggest coal-power generator, but its energy plan envisages roughly 30% more coal and gas power capacity by 2035, and explicitly leaves room for around 10GW of new gas power by 2035.



Türkiye
#1
COAL-POWER
GENERATOR
IN EUROPE

COAL AND GAS
POWER CAPACITY



The **CENAL coal plant at Karabiga, Çanakkale** is pursuing what is formally presented as a “capacity increase” but is in reality a major new coal expansion. The proposal would add a **new 1,050 MW imported-coal unit** to the existing 1,320 MW plant, lifting total capacity to **2,370 MW, an increase of almost 80%**. With its own new boiler, turbine and stack, the project amounts in practical terms to the construction of an additional large coal-fired power plant, despite being classified administratively as an expansion of the existing facility.

From Energy Crisis to Transition: The test for COP31

A UN climate summit taking place in the shadow of what the IEA has called the “biggest energy crisis in history” cannot afford to sidestep the underlying problem: continued dependence on fossil fuels. If COP31 fails to confront that dependency and its consequences for energy prices, affordability and access, it will fall short not only as a climate summit, but as a political, economic and social response to the defining energy challenge of the moment.

At COP28 in 2023, governments agreed to **transition away from fossil fuels in energy systems in a just, orderly and equitable manner, in line with keeping 1.5°C within reach**. COP30 began the next phase by advancing national **transition-away-from-fossil-fuels (TAFF) roadmaps**.

In fact, the last COP in Belém created several important building blocks: a Global Implementation Accelerator, a Just Transition Mechanism, the climate finance work programme, an expanded Action Agenda linked to the first Global Stocktake (GST1), and the Presidency-led Belém Roadmaps on forests and transitioning away from fossil fuels (TAFF). But COP31 will need to move from frameworks to delivery. The historic first international conference on the transition away from fossil fuels in Santa Marta, Colombia, in April added further momentum to this agenda.



© Tom Arran

The three formal COP31 Presidency letters to country delegations setting out the mission and expectations for COP31 published so far not even once containing the phrase “fossil fuels”.

The second letter explicitly sets out the COP31 mandate and the third devotes considerable detail to the Presidency's ten priorities, says these are aligned with the first Global Stocktake yet neither document repeats the Global Stocktake's explicit calls to transition away from fossil fuels or accelerate the phase-down of unabated coal.

Responsibility is not evenly shared. Wealthy fossil-fuel-producing countries like Australia must move fastest: **ending new expansion, establishing clear timelines to phase out existing production, and providing their fair share of climate finance** so that lower-income countries can pursue a just and equitable transition. For Türkiye and Australia, leadership at COP31 must therefore begin at home.



In Türkiye, communities call for more ambitious climate policies and coal phase out. © Caner Özkan / 350.org

350.org calls for COP31 to:

- ✧ **Build equitable transition roadmaps:** Building on Brazil's global TAFF roadmap, governments should commit to and develop national and regional TAFF roadmaps.
- ✧ **Make the just, orderly, and equitable transition away from fossil fuels real and protect the political mandate:** COP31 should shift from commitment to implementation, with equity, energy security, affordability and access at the center. In a difficult negotiating environment, reinforce existing commitments, strengthen accountability and prevent backsliding while building for a strong energy transition negotiated outcome in the second Global Stocktake at COP33.
- ✧ **Put finance at the center:** Fair implementation requires affordable finance, technology transfer and capacity building, especially for countries constrained by debt, high capital costs and limited fiscal space.
- ✧ Both presidencies, **Türkiye and Australia, should announce national just, orderly, and equitable TAFF roadmaps including fossil fuel exports**, including timed pathways for the transition away from fossil fuels and in particular include **coal phase out dates**.



Communities demand coal phase out in Türkiye © Mahmut Koyaş / Change.org



Activists call on Australia to protect people, not profit © Photox - Canberra Photography Service

Data Sources and Methodology

This analysis of Australia's and Türkiye's coal trade combines bilateral coal trade data from the **UN Comtrade** data base with historical coal statistics published by the **OECD/International Energy Agency (IEA)**. For the years 2017-2025 UN Comtrade data under the Harmonized System was used, this data was complimented with joint OECD/IEA data for the years 2015-2016⁴.

Trade flows were quantified via the Harmonized System code **HS 270112** which covers bituminous coal - this includes **metallurgical/coking coal** as well as **thermal coal**⁵. Notably, for emissions calculations, carbon and energy content of coking and thermal coal vary slightly⁶. For years in which the available data identify total coal trade but do not provide a reliable breakdown by coal type, the analysis applies the **average observed composition of Australian coal exports to Türkiye in years for which this distinction is available**⁷.

CO₂ estimates represent emissions from the eventual combustion or use of the traded coal. They are therefore estimates rather than direct measurements and do not include upstream emissions from mining, processing or transport - the lifecycle emissions are hence even larger.

⁴2015 data see page 336ff published under: https://www.oecd.org/content/dam/oecd/en/publications/reports/2016/09/coal-information-2016_g1g69815/coal-2016-en.pdf

2016 data see page 323ff published under: https://www.oecd.org/content/dam/oecd/en/publications/reports/2017/08/coal-information-2017_g1g7c9e7/coal-2017-en.pdf

⁵Other forms of coal such as lignite are not part of Australian-Turkish supply chain.

⁶**Coking coal**: 2.668 tCO₂/t coal; **thermal coal**: 2.441 tCO₂/t coal.

⁷This produces an approximate ratio of **five tonnes of coking coal for every tonne of other coal** and was crosschecked with further coal categories under the Harmonized System of the UN Comtrade Data base:

HS 270111 (anthracite), **270119** (other coal), **270120** (coal briquettes and similar solid fuels), **270210** (lignite), **270220** (agglomerated lignite) and **270400** (coke and semi-coke).



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