

WORLD CEMENT to 2015

**Analysis of Production,
Consumption & Trade
for Individual Countries**

Includes detailed analysis of:

- * Cement Consumption
- * Cement Production
- * Cement & Clinker Trade

for individual countries throughout the world.

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WORLD CEMENT to 2015

Analysis of Production, Consumption & Trade for Individual Countries

The world cement industry has undergone extensive changes in recent years, with varying economic growth and construction sector expansion funding very different patterns of development for individual countries.

Trade volumes and patterns have continued to be largely determined by regional supply/demand imbalances, with the ever-increasing involvement of the multinationals in capacity ownership throughout the world, serving to further complicate the cement and clinker trade profile.

The next decade is set to witness further extensive change in cement supply/demand patterns, as different regions/countries enjoy very different development profiles. This Report examines the current and historical development of cement supply/demand country-by-country throughout the world, and analyses the potential levels of cement supply & demand in those countries throughout the period to 2015.

This Report represents the latest in a series of OSC in-depth Reports on the international cement industry published since the mid-1980s. The detail and range of forecasts in the new Report are even greater than those in the previous publications, and represent the most up to date and comprehensive set of forecasts available on the International cement sector.

The Report includes extensive analysis and forecast for individual countries/regions or-

- Cement consumption
- Cement production
- Cement & clinker imports
- Cement & clinker exports

This Report provides invaluable independent analyses on the development of cement activity throughout the world in the period to 2015 - a period set to witness further large-scale changes. It represents the most up to date and comprehensive examination of cement industry prospects, and is essential reading for all parties with an interest in this sector.

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SECTION 1 INTRODUCTION & EXECUTIVE SUMMARY

Includes an overview of the Report's aims, as well as a summary of the methodology underlying the analyses.

This Section also includes a summary of the most significant points and conclusions drawn from the main body of the Report. They are presented in the order of the corresponding Sections for ease of reference.

SECTION 2 OVERVIEW : WORLD CEMENT 1970-2003

This Section provides detailed analysis of the key developments in world cement supply & demand in past years, with most emphasis on the recent years of extensive cement industry development. Attention is focussed on regional and global cement production, consumption, imports and exports.

SECTION 3 EUROPE

This Section includes full discussion and analysis of cement industry developments in recent years on a country-by-country basis. The Section is sub-divided into:

- 3.1 The European Union (current 15 members)
- 3.2 Other Europe

Europe includes a wide range of market types – from the mature industries of Western Europe to the rapidly changing cement sectors of former Eastern bloc countries and FSU States. Each cement market is unique and subject to different factors, with a wide range of prospects for future sector expansion. For each market in turn, this Section examines recent developments and presents detailed forecasts for cement supply and demand throughout the period to 2015.

A set of alternative forward scenarios is applied to each market, detailing the expected level of cement supply and demand in each case.

SECTION 4 THE AMERICAS

The US cement market has been the world's leading destination for cement & clinker exports in recent years, as cement consumption levels have far exceeded domestic

capacity. Expansion of the latter in conjunction with a slowdown in demand growth has seen the import level fall in recent years – this Section examines what has happened in recent years, and presents detailed forecasts on future cement supply & demand in the US market throughout the period to 2015. Forward development under alternative scenarios is also analysed. This is also undertaken for all of the principal sources of cement activity in

- 4.1 North America
- 4.2 Central & South America.

SECTION 5 AFRICA & THE MIDDLE EAST

The structure of the cement sector in the Middle East has undergone extensive change in recent years, as the commencement of new capacity has radically altered regional cement supply/demand levels. At the same time, the massive disruption associated with conflicts in the region has included marked volatility in annual cement production and consumption volumes, funding a highly dynamic market profile.

Similarly in Africa, the wide range of markets included here – from the total clinker import dependency of some West African countries to the recently emerged large-scale exporter status of the previous large import Egypt – dictates a complex profile of cement supply/demand. Each principal source of cement demand or supply is examined in detail, with market forecasts for each through to 2015.

As with the other Sections, a set of alternative forward scenarios is developed for each market, detailing the expected level of cement supply/demand in each case.

- 5.1 Africa
- 5.2 Middle East

SECTION 6 EAST ASIA

The East Asia region plays a leading role in world cement supply/demand, with China alone currently responsible for approximately 37% of world production. The Chinese cement industry is developing rapidly, with important implications for other Asian and Western markets. Japanese cement activity has contracted in recent years, although the country still plays a key role in world trade. Other East Asian countries also play a significant part in the world cement profile, and detailed projections are presented and discussed for each in turn.

SECTION 7 OTHER ASIA & OCEANIA

SE Asia saw dramatic cement demand contraction at the end of the 1990s, resulting in large volumes of cement and clinker available for export, and essentially redefining the

pattern of world trade. Recent years have seen varying success in terms of market recovery, and in terms of export availability. In SW Asia, India has emerged as a significant regional exporter and has massive potential for domestic demand expansion. This Section also includes the countries of Oceania.

For each country in turn, detailed forecasts of future cement supply and demand are presented for throughout the study period, with the use of a set of alternative scenarios providing a Low/High range for future development.

- 7.1 South-West Asia
- 7.2 South-East Asia
- 7.3 Oceania

SECTION 8 WORLD CEMENT SUPPLY/DEMAND TO 2015

This Section examines the implications of the expected national forward development of national cement supply and demand for regional and global cement activity, throughout the period to 2015. This includes analysis and discussion on the implications of the alternative scenarios.

These discussions help to place the individual country forecasts into a wider regional and global perspective.

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