

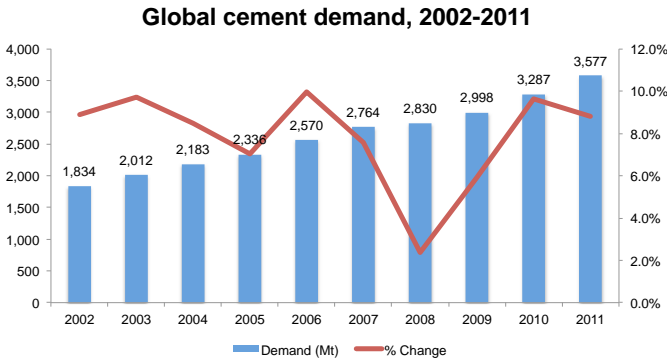
# The cement industry in figures

An overview of global cement sector trends

Thomas Armstrong  
International Cement Review



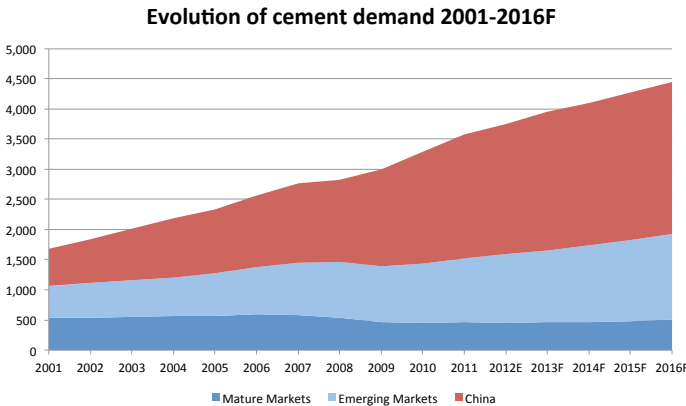
## Global cement demand



Global cement industry trends



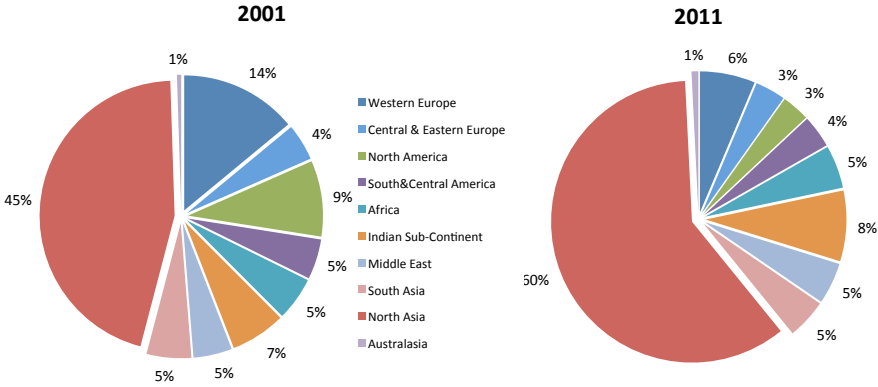
# Global cement consumption



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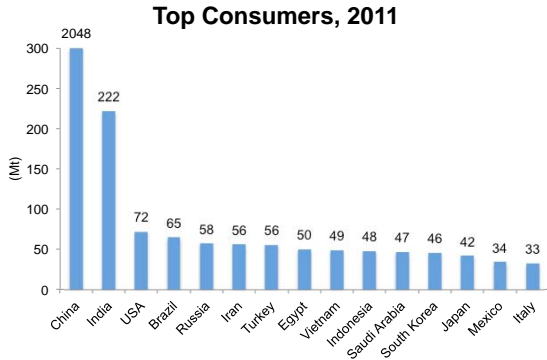
# Regional consumption



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# Top 15 cement consumers

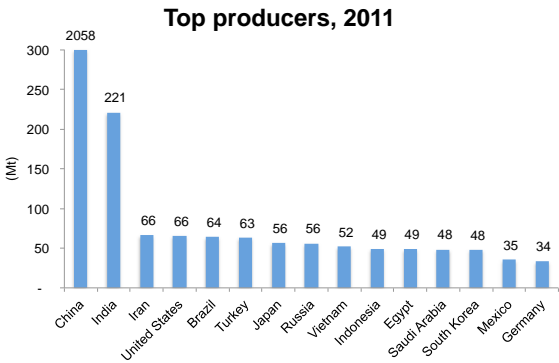


Rank by volume	2001	2011
China	1	1
India	3	2
USA	2	3
Brazil	8	4
Russia	9	5
Iran	15	6
Turkey	14	7
Egypt	12	8
Vietnam	19	9
Indonesia	13	10
Saudi Arabia	18	11
South Korea	5	12
Japan	4	13
Mexico	11	14
Italy	7	15

Global cement industry trends



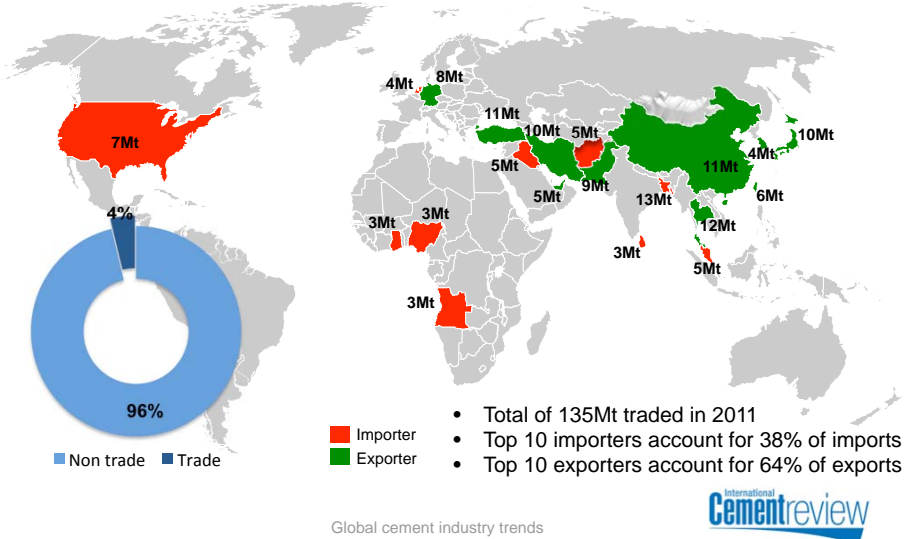
# Top 15 cement producers



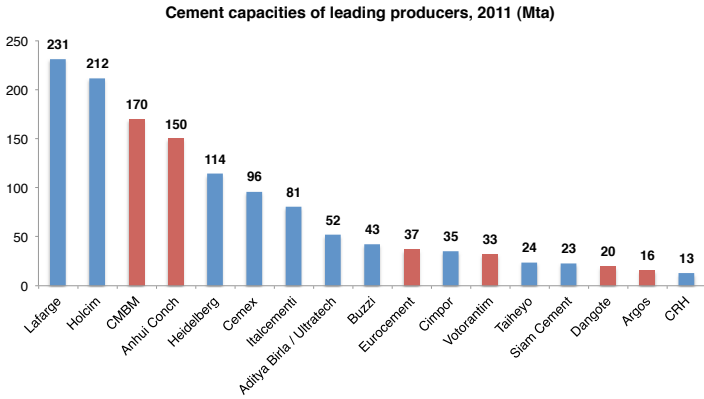
Global cement industry trends



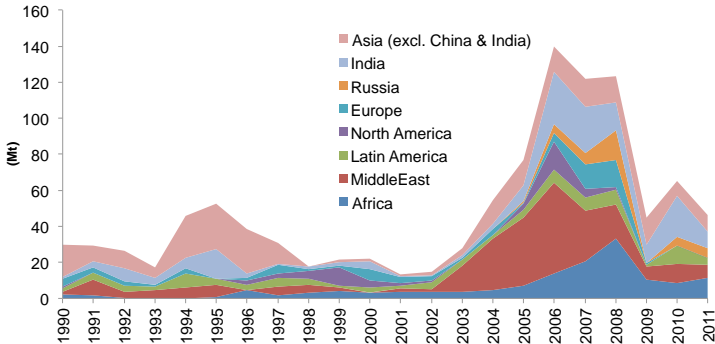
## Top 10 importers & exporters, 2011



## Leading companies



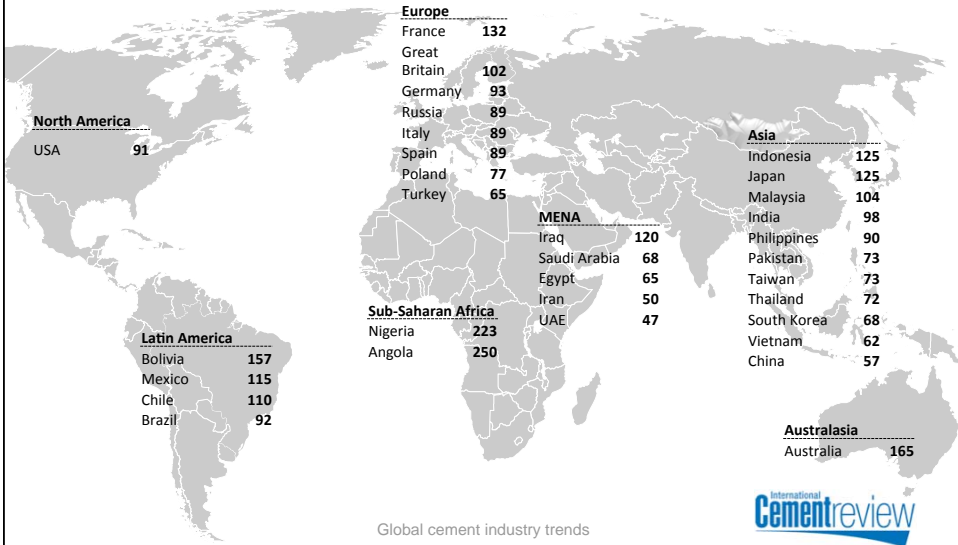
# Contracted capacity, 1990-2011



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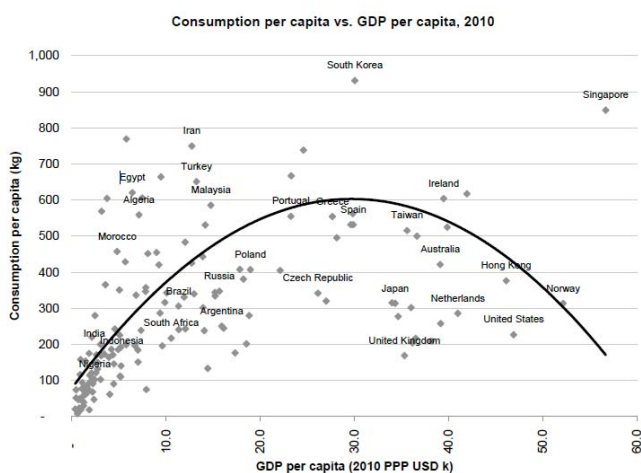
# Spot prices, 2011 (USD/t)



Global cement industry trends



# Per capita consumption



Global cement industry trends



# Growth outlook

## Top cement consumers, growth forecasts

	2011	2012E	2013F
<b>China</b>	2,048.0	2,160.0	2,290.0
<i>y/y change</i>	10.6%	5.5%	6.0%
<b>India</b>	222.0	232.2	248.0
<i>y/y change</i>	7.6%	4.6%	6.8%
<b>USA</b>	72.2	78.0	79.8
<i>y/y change</i>	3.1%	8.0%	2.3%
<b>Brazil</b>	65.0	69.7	73.2
<i>y/y change</i>	8.3%	7.3%	5.0%
<b>Russia</b>	57.4	64.0	67.8
<i>y/y change</i>	16.2%	11.5%	6.0%
<b>Iran</b>	56.4	58.5	60.0
<i>y/y change</i>	2.9%	3.7%	2.6%
<b>Turkey</b>	55.7	57.8	60.1
<i>y/y change</i>	11.4%	3.8%	4.0%
<b>Egypt</b>	50.0	51.0	52.5
<i>y/y change</i>	0.7%	1.9%	3.0%
<b>Vietnam</b>	49.2	48.0	52.0
<i>y/y change</i>	-2.0%	-2.4%	8.3%
<b>Indonesia</b>	48.0	53.3	57.3
<i>y/y change</i>	17.7%	11.0%	7.5%

Global cement industry trends



## Global growth outlook

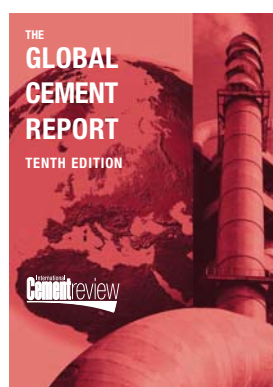
	2011	2012E	2013F	2014F	2015F	2016F	5-yr CAGR
<b>Mature Markets</b>	464	461	461	471	485	502	
% Change	4.6%	-0.7%	0.2%	2.1%	2.9%	3.7%	<b>1.6%</b>
<b>Emerging Markets</b>	1,064	1,130	1,198	1,269	1,341	1,420	
% Change	7.3%	6.2%	5.9%	5.9%	5.7%	5.9%	<b>5.9%</b>
<b>China</b>	2,048	2,160	2,290	2,360	2,450	2,520	
% Change	10.6%	5.5%	6.0%	3.1%	3.8%	2.9%	<b>4.2%</b>
<b>World</b>	3,577	3,751	3,949	4,099	4,276	4,442	
% Change	8.8%	4.9%	5.3%	3.8%	4.3%	3.9%	<b>4.4%</b>

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# Thank you



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