

2019 CEMENT IN KOREA





Build your future with

Cement



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President Message



President
HyunJoon Lee 이 현준

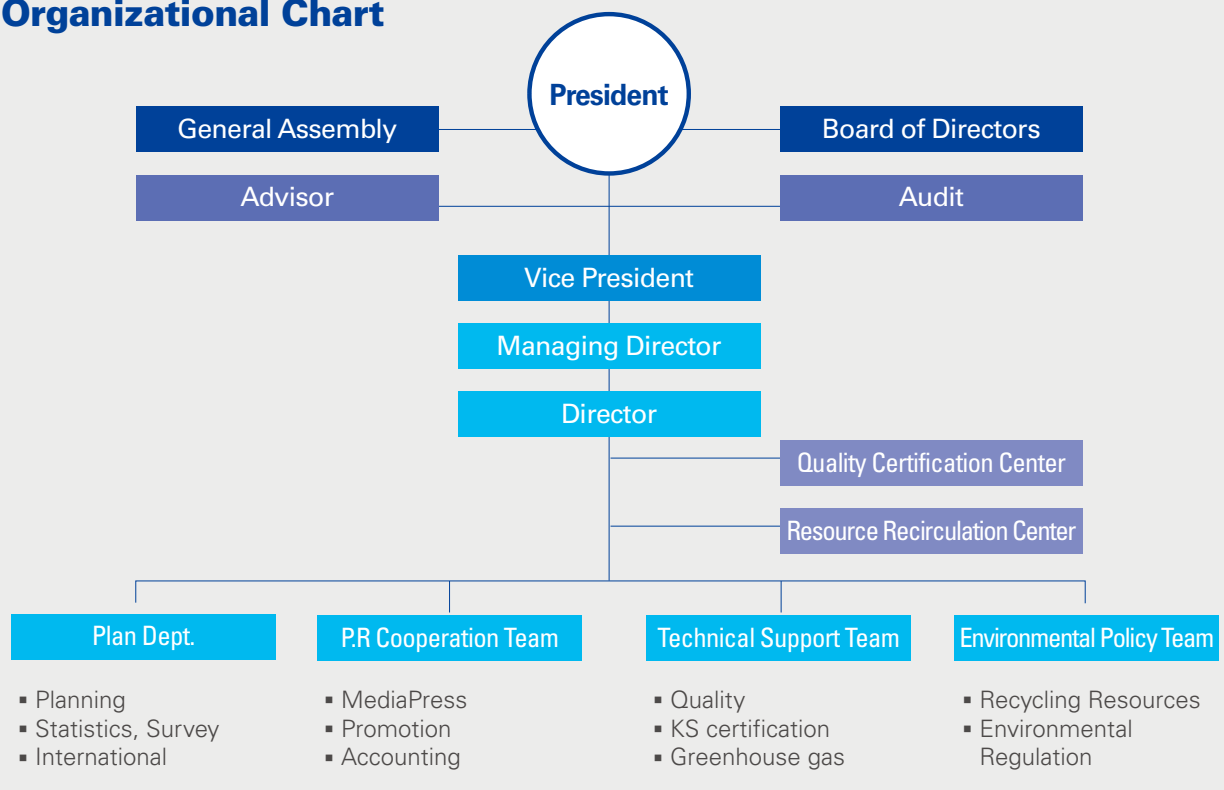
The cement industry is one of the core industries in Korea. It has grown with Korea's economic development as a foundation of national economic development supporting the construction industry. The cement industry is now evolving into the future-oriented, 21st century's leading industry through the production of low cost, high quality, trust-worthy and environmentally friendly cement for coexistence with our community.

KCA, Korea Cement Association is endeavoring to contribute to the continuous development of the cement industry and prosperity of our people in the face of rapidly changing industrial surroundings and fierce worldwide competition.

KCA provides useful cement related information that can benefit the industry and its concerned parties such as major statistics, latest movements of member companies, recycling resources, CSR and etc. We will keep paying a keen attention to the opinions related to the cement industry to serve as a place of global exchange in the cement industry. We look forward to your generous support.

Thank you.

Organizational Chart



About the Korea Cement Industry

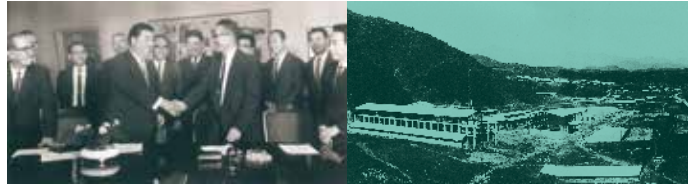
■ History of the Korea Cement Industry

1960's



The beginning of industrial modernization

Before and after the liberation period



- Restoration after Korean War
- Established the first plant in South Korea (Samcheok plant)

1960~1979's



Leading economic development

Take off stage



- Expansion of cement production capacity and up-to-date production facilities
- Transportation development such as subways and highways, and expansion of ports and railway facilities

1980~1999's



Modernization of the cement industry

Growth period



- Upgrade cement production facilities (NSP) and export expansion
- Hosting international events such as Seoul 88 Olympics
- New city and Housing Project

2000~2019's



Environment and energy saving

Maturity



- Completion of skyscrapers through new product development
- Fostering the environmental industry using recycling resources
- Establishment of Energy Efficiency-Oriented Production System

Map of Cement Production Plant

■ Location of Kiln Plants



Scale of Korea Cement Industry (2019)

■ Industry Status



No. of Kiln Plants(kiln) 11(46)
Kiln Capacity (1,000t) 61,475



Member Companies 9
No. of Grinding Plants 26



Cement Clinker Export (1,000t) 6,581



Cement Production (1,000t) 50,635
Domestic Consumption (1,000t) 49,483



No. of Employees 5,093



No. of Distribution Terminals(Silos) 76(149)
Terminal Capacity (1,000t) 1,064

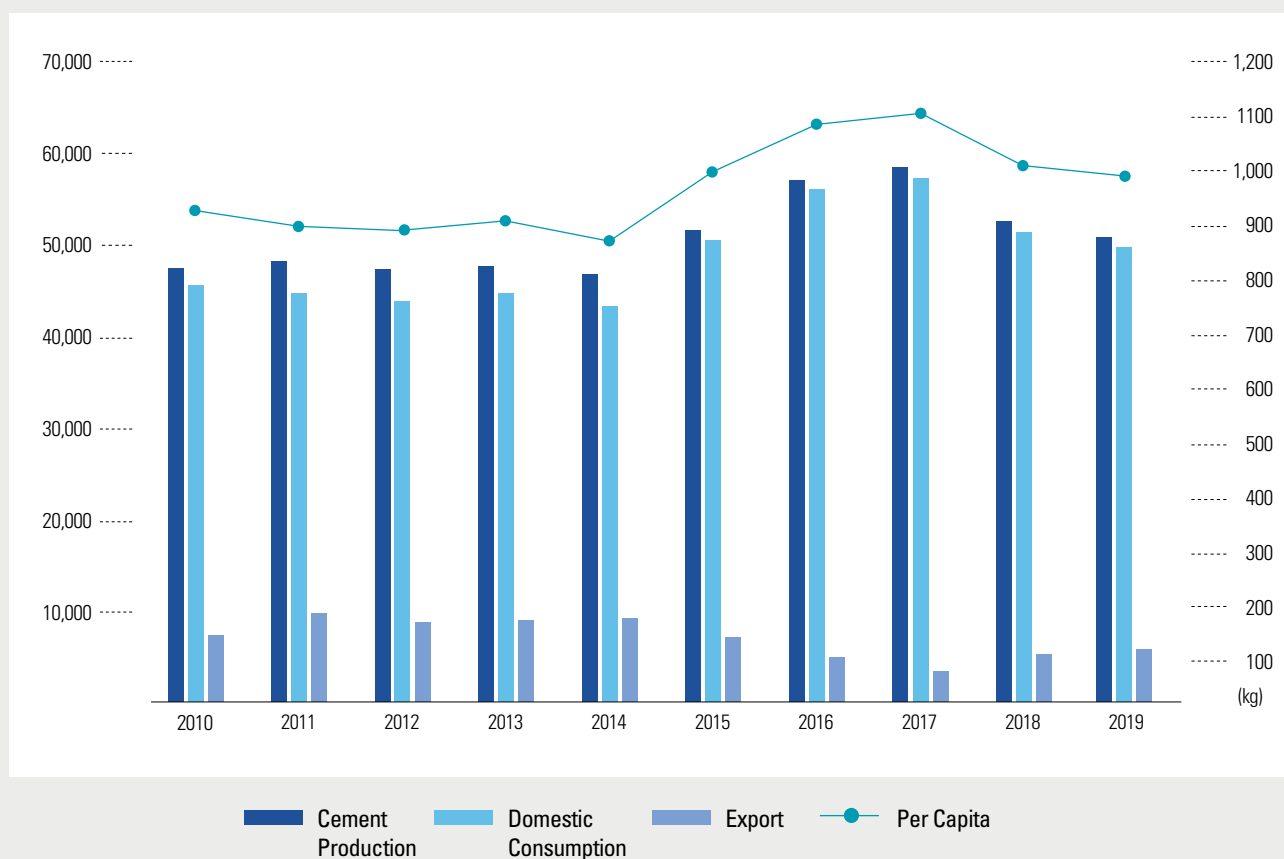
Supply & Demand

■ Production · Sales · Consumption

(1,000 T)

Year	Cement Production		Sales						Import		Domestic Consumption		Per Capita (kg)
		%	Domestic	%	Export	%	Total	%		%		%	
2010	47,420	94.6	44,721	93.9	7,524	164.6	52,245	100.1	772	92.9	45,493	93.9	918
2011	48,249	101.7	43,918	98.2	9,965	132.4	53,883	103.1	686	88.9	44,601	98.0	893
2012	46,862	97.1	43,210	98.4	8,883	89.1	52,093	96.7	730	106.4	43,939	98.5	875
2013	47,291	100.9	44,413	102.8	9,049	101.9	53,462	102.6	798	109.3	45,174	102.8	896
2014	47,048	99.5	42,809	96.4	9,525	105.3	52,334	97.9	897	112.4	43,707	96.8	861
2015	52,044	110.6	49,579	115.8	7,348	77.1	56,927	108.8	1,158	129.1	50,737	116.1	995
2016	56,507	108.6	54,605	110.1	5,043	5.0	59,648	104.8	1,213	104.7	55,756	109.9	1,089
2017	57,400	101.6	55,857	102.3	3,389	67.2	59,246	99.3	891	73.5	56,711	101.7	1,104
2018	52,093	90.8	50,575	90.5	5,444	160.6	56,019	94.6	662	74.3	51,237	90.3	993
2019	50,635	97.2	48,884	96.7	6,581	120.9	55,465	99.0	599	90.5	49,483	96.6	957

Clinker Included in export and import

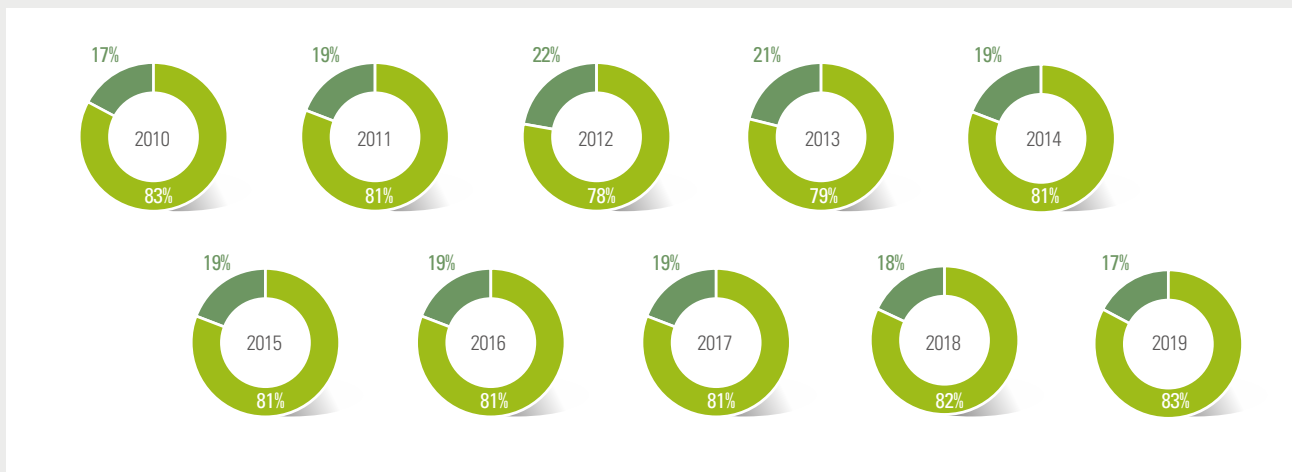


Cement Production

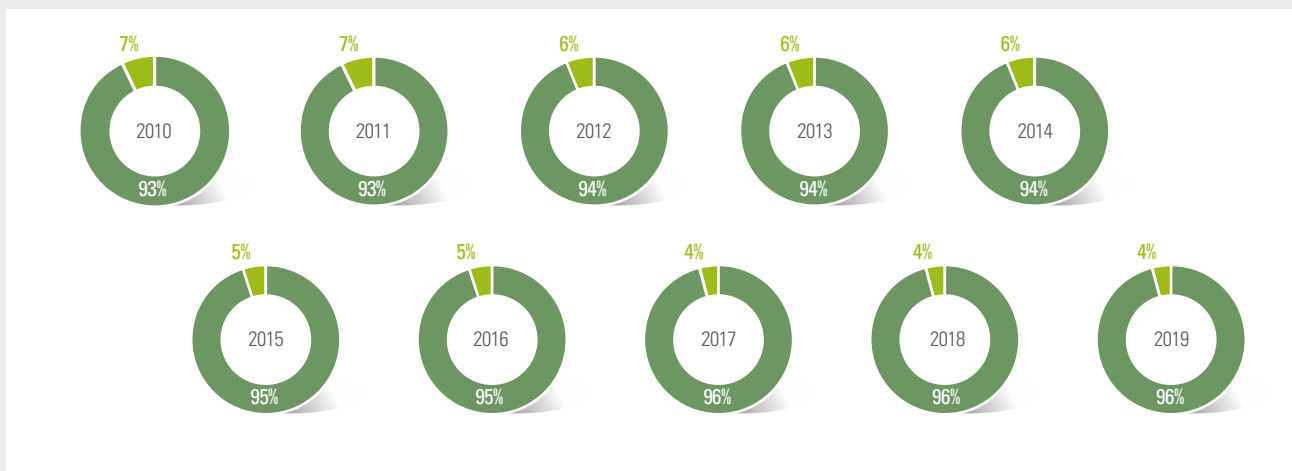
■ Production by type of cement

(1,000 T)

TYPE	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Portland Cement	39,321	38,977	36,603	37,391	38,129	42,294	45,887	46,570	42,702	41,914
Blended Cement	8,099	9,272	10,259	9,900	8,919	9,750	10,620	10,830	9,391	8,721
TOTAL	47,420	48,249	46,862	47,291	47,048	52,044	56,507	57,400	52,093	50,635



Portland Cement Blended Cement



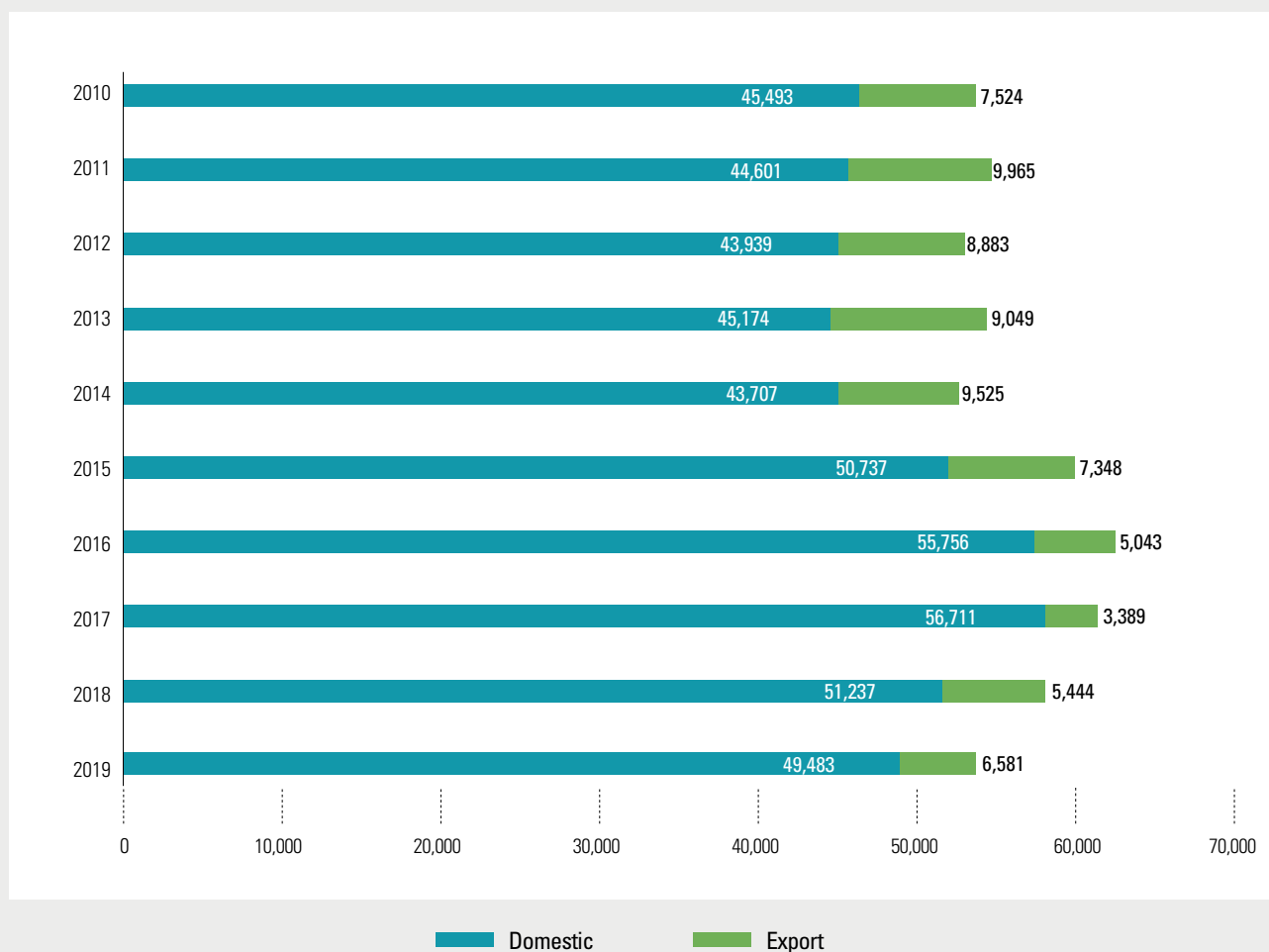
Bulk Cement Bag Cement

Sales Volume

■ Sales volume of the member companies

(1,000 T)

Year	Sampyo	SsangYong	Hanil	Hanil Hyundai	Asia	Sungshin	Halla	Hankook	Others	TOTAL
2010	8,245	13,847	6,372	4,459	3,255	5,764	7,178	1,122	2,775	53,017
2011	9,422	14,386	5,912	4,364	3,072	5,131	7,708	1,402	3,169	54,566
2012	9,087	13,428	5,699	4,428	3,000	5,923	6,476	1,520	3,261	52,822
2013	8,910	13,671	5,986	4,526	3,107	6,003	6,578	1,560	3,881	54,223
2014	8,301	13,370	5,941	4,371	3,191	5,775	7,250	1,508	3,525	53,232
2015	8,156	14,076	6,256	4,936	3,712	7,694	7,094	1,851	4,310	58,085
2016	9,088	14,045	7,140	5,287	4,039	7,795	7,125	1,686	4,593	60,798
2017	9,706	13,472	6,943	4,773	4,190	7,171	7,781	1,949	4,114	60,099
2018	8,700	13,597	6,336	4,846	3,593	7,257	7,178	1,582	3,592	56,681
2019	8,935	13,106	5,791	5,395	3,451	7,114	7,189	1,707	3,376	56,064



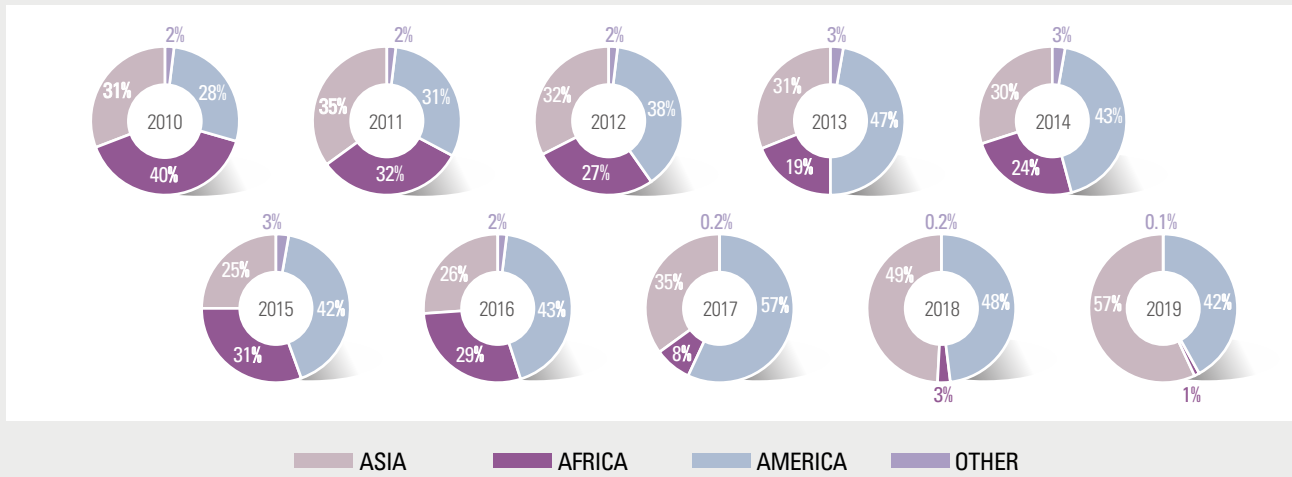
Export & Import

Export

(1,000 T)

CONTINENT	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
ASIA	2,305	3,454	2,824	2,828	2,819	1,817	1,329	1,195	2,678	3,761
AFRICA	2,983	3,224	2,383	1,702	2,285	2,261	1,460	263	159	79
AMERICA	2,077	3,045	3,411	4,209	4,139	3,068	2,176	1,924	2,596	2,734
OTHER	159	242	265	310	282	202	78	7	11	7
TOTAL	7,524	9,965	8,883	9,049	9,525	7,348	5,043	3,389	5,444	6,581

Clinker Included

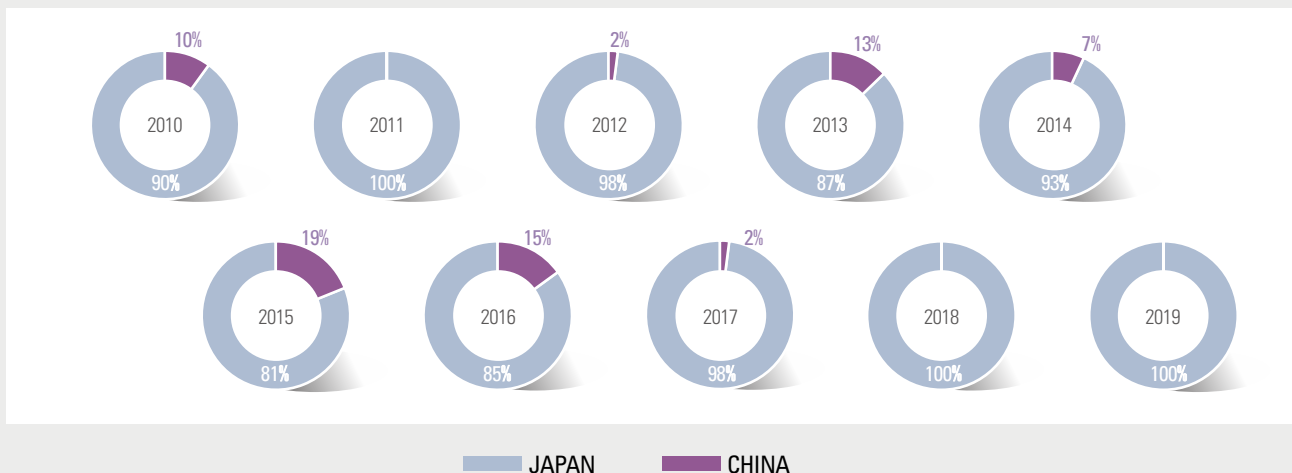


Import

(1,000 T)

CONTINENT	COUNTRY	YEAR	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
ASIA	JAPAN		692	684	719	697	837	942	1,030	871	662	599
	CHINA		80	2	11	101	60	216	183	20	-	-
TOTAL			772	686	730	798	897	1,158	1,213	891	662	599

Clinker Included



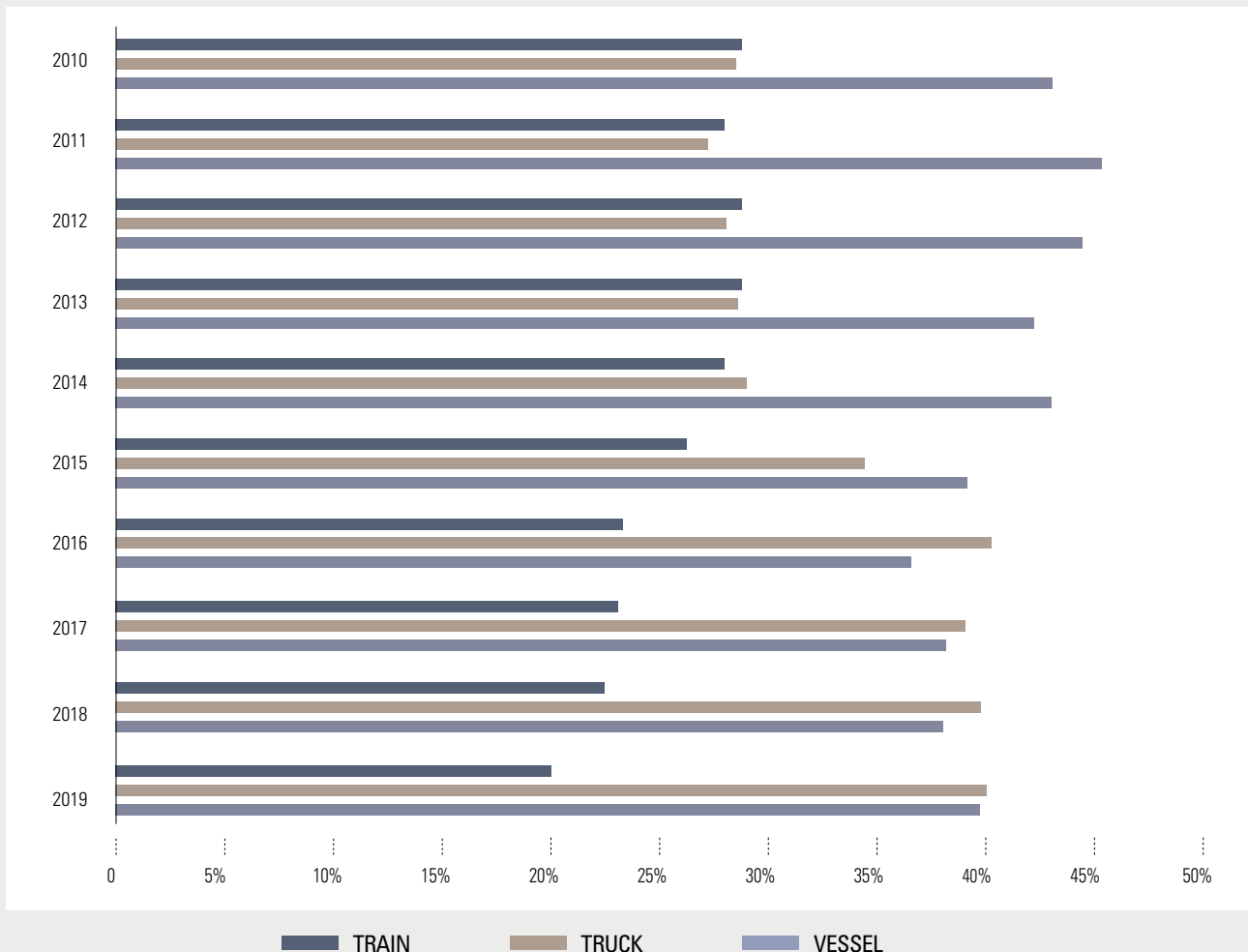
Transport Volume

■ Proportion by type of transport

(1,000 T)

Year	TRAIN		TRUCK		VESSEL		TOTAL
		%		%		%	
2010	14,596	28.8	14,240	28.2	21,766	43.0	50,602
2011	14,487	27.9	13,809	26.6	23,596	45.5	51,892
2012	14,409	28.6	13,672	27.2	22,282	44.2	50,363
2013	14,754	28.9	14,534	28.5	21,726	42.6	51,014
2014	14,039	27.5	14,788	28.9	22,268	43.6	51,095
2015	14,747	26.8	18,968	34.4	21,344	38.8	55,059
2016	13,474	23.4	23,159	40.2	20,964	36.4	57,597
2017	13,238	22.9	22,563	39.1	21,910	38.0	57,711
2018	12,346	22.5	21,758	39.7	20,705	37.8	54,809
2019	11,002	20.1	21,960	40.1	21,780	39.8	54,742

Export Included



KCA Member



Head Office	20, Dongyang-gil, Samcheok-si, Gangwon-do, Republic of Korea (25930)		
Contact	82-33-571-7000	Website	http://www.sampyocement.co.kr
Establishment	June 15, 1957	Assets	1,112(billion won)

Production Scale

Clinker Capacity(1,000t)	10,045 / year	Kiln Plants	1(Dry Type)
Cement Capacity(t)	33,100 / day	Mill Plant	5

Production List

Cement Product	Ordinary portland cement / Moderate heat cement High early strength cement / Low-heat cement Sulfate resisting cement / Slag cement
Other Product	Dry mortar(For wall plastering) / Dry mortar(For masonry wall) Dry mortar(For Floor Plaster) / Dry mortar(For tile)



KCA Member



SsangYong Cement

Head Office	34, Supyo-ro, Jung-gu, Seoul, Republic of Korea (04555)		
Contact	82-2-2270-5114	Website	http://www.ssangyongcement.co.kr
Establishment	May 14, 1962	Assets	2,923(billion won)

Production Scale

Clinker Capacity(1,000t)	14,758 / year	Kiln Plants	2(Dry Type)
Cement Capacity(t)	43,220 / day	Mill Plant	4

Production List

Cement Product	Ordinary portland cement / Moderate heat cement High early strength cement / Low-heat cement Sulfate resisting cement / Slag cement / Ternary blended cement Ultra super early strength cement / Super high-early strength cement Micro-cement / Geocrete / Non-crack cement
Other Product	Non-shrinkage mortar(Plus) / Non-shrinkage mortar(Basic) Non-shrinkage mortar(SR) / Non-shrinkage mortar(AD) Resistance acid mortar / Expansion agent (CSA)





HANIL CEMENT

Head Office	275, Hyoryeong-ro, Seocho-gu, Seoul, Republic of Korea (06654)		
Contact	82-2-531-7000	Website	http://www.hanilcement.com
Establishment	December 28, 1961	Assets	2,670(billion won)

Production Scale

Clinker Capacity(1,000t)	7,131 / year	Kiln Plants	1(Dry Type)
Cement Capacity(t)	26,700 / day	Mill Plant	3

Production List

Cement Product	Ordinary portland cement / Slag cement Special & Pre-Mixed Cement
Other Product	Dry mortar(For plastering) / Dry mortar(For masonry) Dry mortar(For Floor screed) / Dry mortar(For tile) Dry mortar(For maintenance & reinforcement) Dry mortar(For grout) / Ready Mixed Concret / Slag Powder

KCA Member

HANIL HYUNDAI CEMENT

Head Office	275, Hyoryeong-ro, Seocho-gu, Seoul, Republic of Korea (06654)		
Contact	82-2-520-2114	Website	http://www.hanilhdcement.com
Establishment	September 15, 1963	Assets	560(billion won)

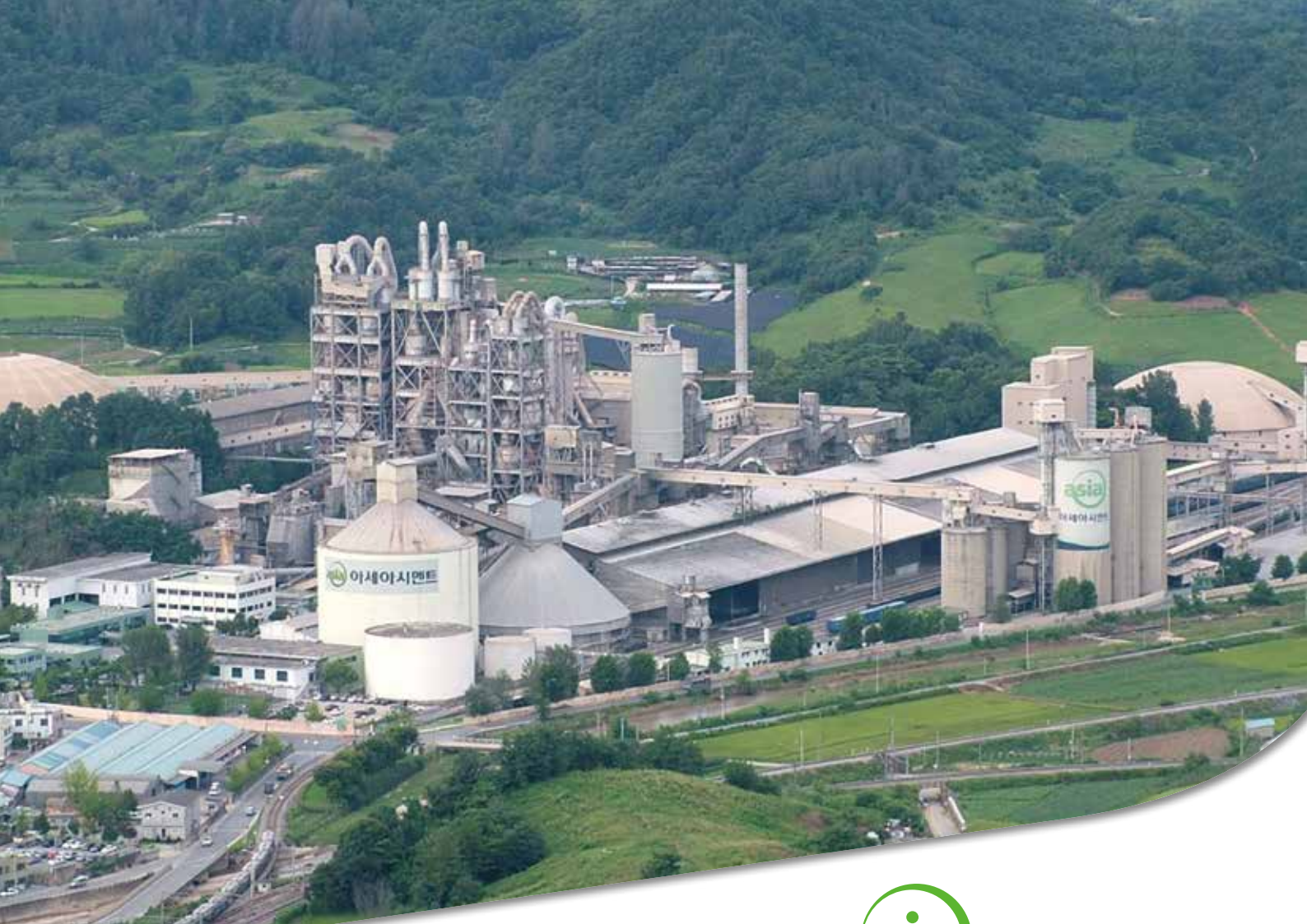
Production Scale

Clinker Capacity(1,000t)	6,864 / year	Kiln Plants	2(Dry Type)
Cement Capacity(t)	24,624 / day	Mill Plant	3

Production List

Cement Product	Ordinary portland cement / Moderate heat cement High early strength cement / Low-heat cement Sulfate resisting cement / Slag cement
Other Product	Slag Powder





Head Office	430, Nonhyeon-ro, Gangnam-gu, Seoul, Republic of Korea (06223)		
Contact	82-2-527-6500	Website	http://www.asiacement.co.kr
Establishment	April 15, 1963	Assets	1,143(billion won)

Production Scale

Clinker Capacity(1,000t)	4,146 / year	Kiln Plants	1(Dry Type)
Cement Capacity(t)	12,000 / day	Mill Plant	2

Production List

Cement Product	<p>Ordinary portland cement / Moderate heat cement High early strength cement / Low-heat cement Sulfate resisting cement / Slag cement / Super Low-heat cement Super high-early strength cement / Geocrete Foamed concrete cement</p>
Other Product	<p>Dry mortar(For wall plastering) / Dry mortar(For masonry wall) Dry mortar(For Floor Plaster) / Dry mortar(For tile) Dry mortar(For grout) / Dry mortar(For reinforcement)</p>

KCA Member

SUNGSHIN

Head Office	29, Insadong 5-gil, Jongno-gu, Seoul, Republic of Korea (03162)		
Contact	82-2-3782-7000	Website	http://www.sungshincement.co.kr
Establishment	March 16, 1967	Assets	946(billion won)

Production Scale

Clinker Capacity(1,000t)	9,686 / year	Kiln Plants	1(Dry Type)
Cement Capacity(t)	30,000 / day	Mill Plant	2

Production List

Cement Product	Ordinary portland cement / Moderate heat cement High early strength cement / Low-heat cement Sulfate resisting cement / Slag cement
Other Product	Ordinary concrete / Light weight concrete Concrete for pavement / High strength concrete Anti washout underwater concrete





Head Office	225, Sangye-gil, Okgye-myeon, Gangneung-si, Gangwon-do, Republic of Korea (25645)		
Contact	82-33-534-1000	Website	http://www.hallacement.co.kr
Establishment	January 27, 1978	Assets	909(billion won)

Production Scale

Clinker Capacity(1,000t)	8,184 / year	Kiln Plants	2(Dry Type)
Cement Capacity(t)	37,575 / day	Mill Plant	5

Production List

Cement Product	<p>Ordinary portland cement High early strength cement / Blast-furnace slag cement SUPERMENT PRO (High early strength) CEM PRO & CEM FILE (For steam curing concrete) CEM PILL PRO (For grouting & soil stabilization) CEM LOW HEAT (For mass concrete) CEM WATERLOCK (For less shrinkage & crack) CEM FERRO (For sludge solidification)</p>
Other Product	CEM PHALT (Mortar for pavement)

KCA Member



Head Office	239, Mudeung-ro, Buk-gu, Gwangju, Republic of Korea (61228)		
Contact	82-62-519-1600	Website	http://www.hcnt.co.kr
Establishment	February 18, 1976	Assets	178(billion won)

Production Scale

Cement Capacity(t)	8,000 / day	Mill Plant	1
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Production List

Cement Product	Other Product
Slag cement / Low-heat mixed cement	Slag powder



Head Office	94, Sogong-ro, Jung-gu, Seoul, Republic of Korea (04532)		
Contact	82-2-757-3801	Website	http://www.unioncement.com
Establishment	January 11, 1964	Assets	184(billion won)

Production Scale

Clinker Capacity(1,000t)	145 / year	Kiln Plants	1
Cement Capacity(t)	550 / day	Mill Plant	1

Production List

Cement Product	Other Product
White portland cement / Alumina cement Calcium aluminat cement / Unizet cement	DRY MORTAR / ALC MORTAR POWER FLEX / UN RCRETE

2019 KCA Activities (External)

1. The 2019 Korea Environmental Awards



❖ Awarded Grand Prize in the resource circulation sector for 4 consecutive years

At the 2019 Korea Environmental Awards Ceremony, the KCA was recognized for the contribution of activities to promote resource circulation, such as establishing the conditions for recycling waste synthetic resin necessary for solving the waste plastic disposal crisis and holding a resource circulation promotion forum. The Environment Grand Prize is a prestigious award of the highest authority awarded to organizations and companies that have been striving for environmental conservation and sustainable social development.

The KCA is actively promoting the safety and excellence of resource circulation in the cement industry by operating the Resource Circulation Center and leading the way in recycling and nature conservation.

2. The 2019 seminar on the greenhouse gas reduction research conference for the cement industry



❖ Enhancement of ability to respond to current issues related to greenhouse gas and commitment to reduce greenhouse gas.

The KCA held the cement Industry Greenhouse Gas Reduction Research Society seminar to conduct a technical briefing session and an interim report on strategic tasks. At the meeting, the global cement industry's greenhouse gas reduction targets and domestic greenhouse gas policies in 2050 were explained. Discussions were made between industry practitioners and experts on greenhouse gas policies reflecting the characteristics of the cement industry. This seminar was designed to improve the ability of the cement industry to respond to current issues related to greenhouse gases and to commit to efforts to reduce greenhouse gases.

2019 KCA Activities (Internal)

3. The 46th Cement Symposium & 56th Anniversary Ceremony



The KCA held the 46th Cement Symposium and 56th-anniversary event. The cement symposium shares the research results in various fields such as cement production technology, quality improvement, and energy saving. It holds every year to enhance the competitiveness of the cement industry by sharing recent advanced technologies.

4. Enhance customer satisfaction by securing quality excellence.



❖ Signboard ceremony to mark the designation of quality control organizations by item

The KCA plans to establish a new quality certification center to handle the certification review and systematic quality control of cement and related products to focus on cement quality stabilization projects.

In commemoration of the KCA designated as an item-specific quality control organization, the KCA president and industry representatives held a signboard hanging ceremony and began full-fledged activities.

The power that sustains the world It is Cement

SAMPYO
Cement

S
SsangYong Cement

S HANIL CEMENT

S HANIL HYUNDAI CEMENT

asia CEMENT
asia
HALLA
CEMENT

SUNGSHIN

HCT

union

KCA
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