



2012

**CEMENT  
IN KOREA**

Korea Cement Association

# Outline of Industry

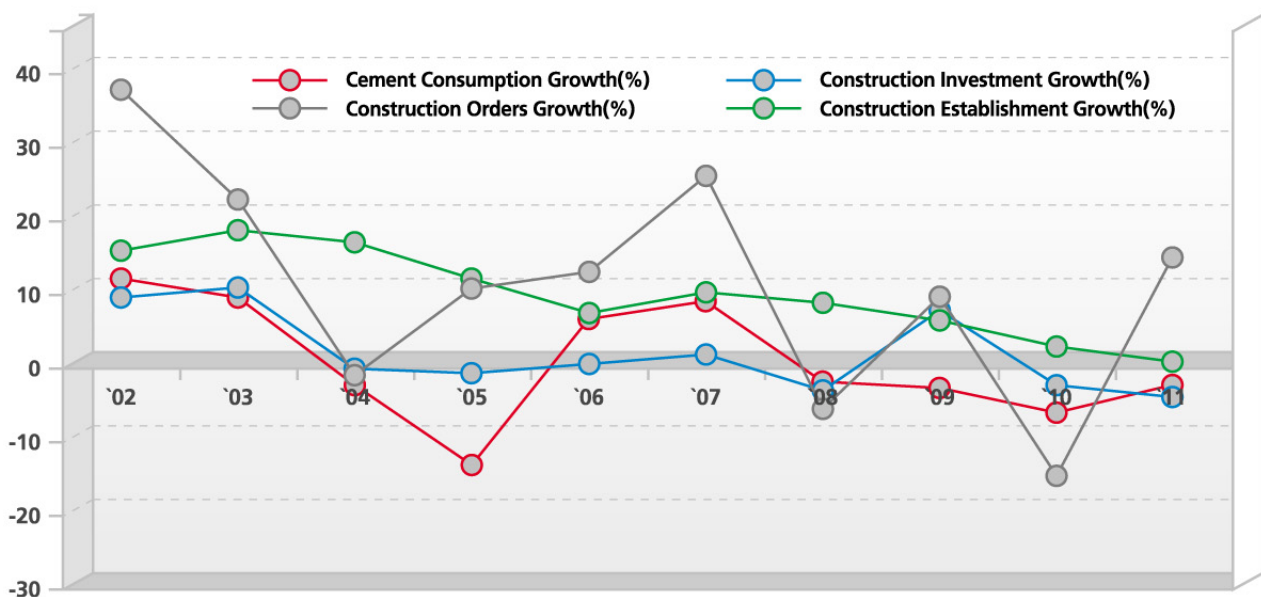
## Scale of Cement Industry (2011)

No. of Companies	11
No. of Kiln Plants	13
No. of Grinding Plants	28
No. of Kilns	51
Assets (billion Won)	11,121
Cement Production (1,000t) * #	48,249
Domestic Consumption (1,000t) *	44,601
No. OF Employees	5,196
No. of Distribution Terminals(Silos)	94(160)
Terminal Capacity (1,000t)	1,104

\* White cement not included.

# Exported clinker not included.

## Cement Consumption Growth & Construction Index Growth





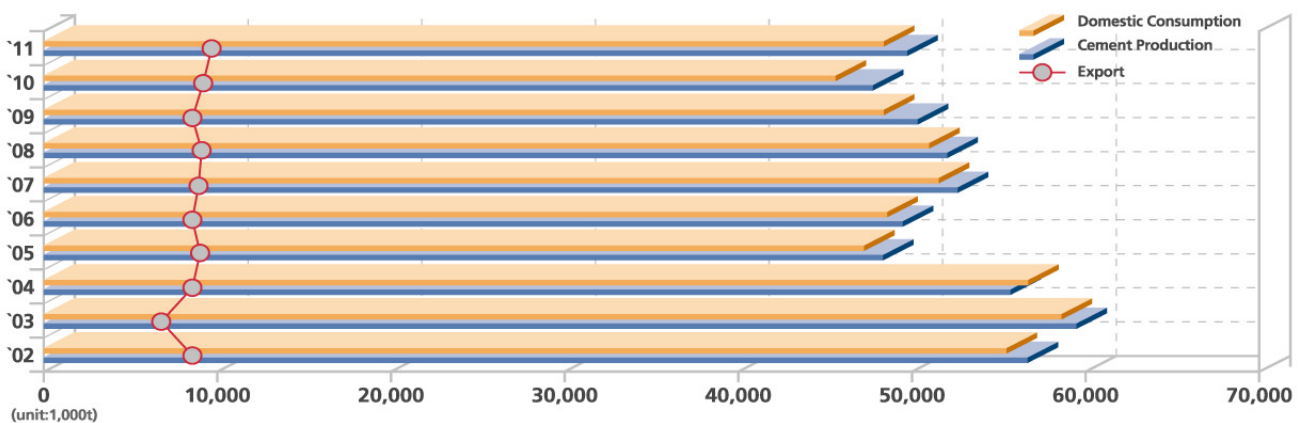
# Supply & Demand

## Production & Sales & Consumption

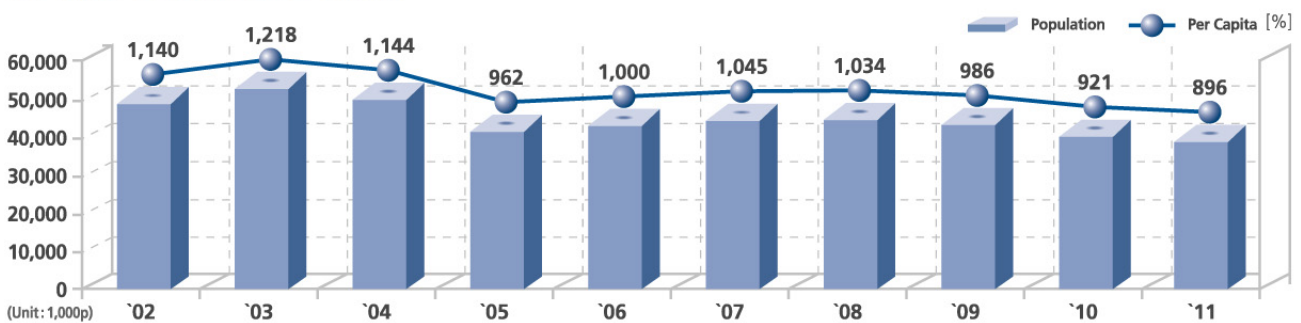
(Unit:1,000p)

Year	Cement Production*		Sales						Import		Domestic Consumption		Per Capita (kg)
		%	Domestic	%	Export	%	Total	%		%		%	
2002	55,514	106.7	53,100	108.4	3,393	73.0	56,493	105.4	1,192	109.9	54,292	108.5	1,140
2003	59,194	106.6	56,423	106.3	3,147	92.7	59,570	105.4	1,879	157.6	58,302	107.4	1,218
2004	54,330	91.8	51,522	91.3	4,061	129.1	55,583	93.3	3,420	182.0	54,942	94.2	1,144
2005	47,197	86.9	42,883	83.2	5,970	147.0	48,853	87.9	3,403	99.5	46,286	84.2	962
2006	49,199	104.2	45,188	105.4	6,197	103.8	51,385	105.2	3,198	94.0	48,386	104.5	1,000
2007	52,182	106.1	47,883	106.0	5,342	102.3	53,225	105.5	2,917	91.2	50,801	105.0	1,045
2008	51,653	99.0	48,652	101.6	6,500	102.5	55,152	101.7	1,985	68.1	50,637	99.7	1,034
2009	50,126	97.0	47,639	97.9	4,572	70.3	52,211	94.7	831	41.9	48,470	95.7	986
2010	47,420	94.6	44,721	93.9	7,524	164.6	52,245	100.1	772	92.9	45,493	93.9	921
2011	48,249	101.7	43,915	98.2	9,965	132.4	53,880	103.1	686	88.5	44,601	98.0	896

\* Exported clinker not included. Export and Import include clinker. Percentage denotes comparative changes with the previous year.



## Per Capita Consumption of Cement





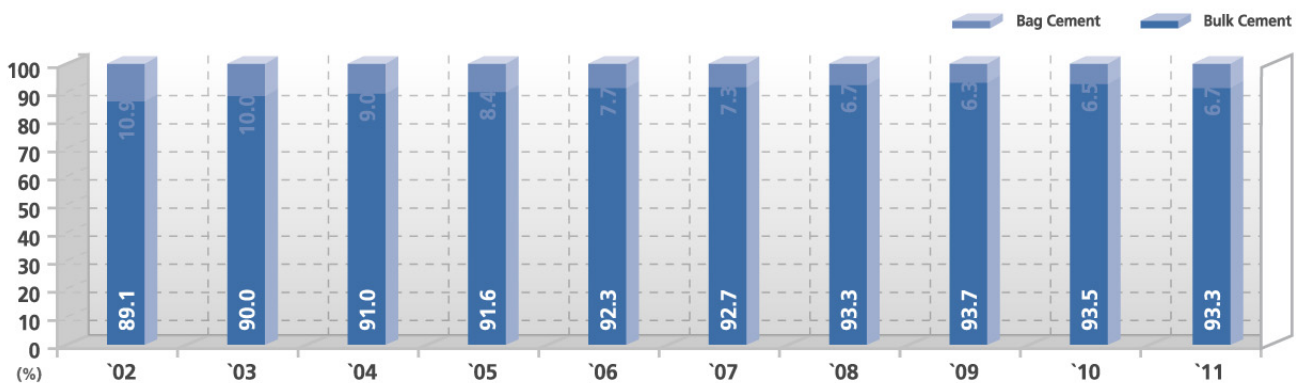
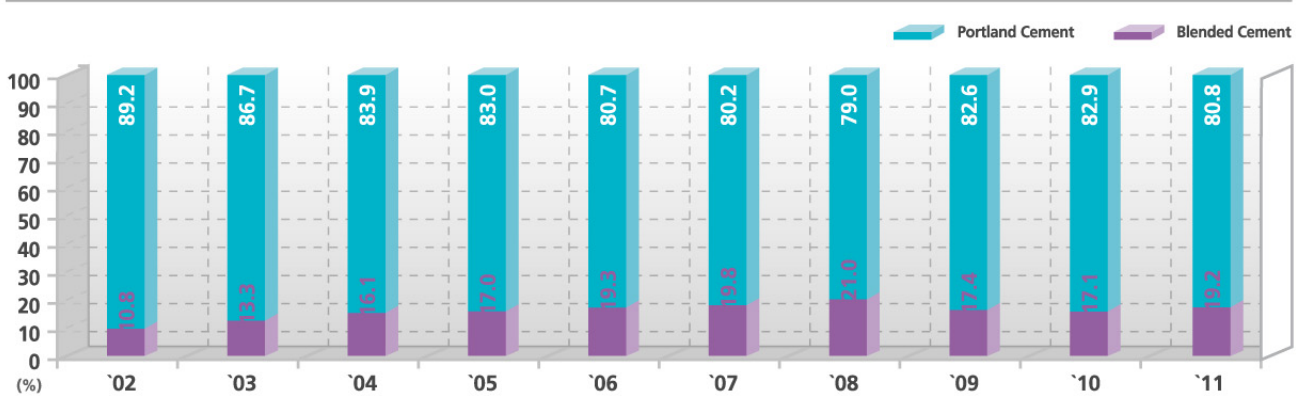
# Cement Production

## Classified by Type of Cement

(unit:1,000t)

Type		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Portland Cement	Ordinary	47,077	49,465	43,772	36,952	37,597	39,564	39,666	40,225	38,376	37,668
	Moderate Heat	2,279	1,745	1,710	1,991	1,862	2,157	1,092	904	646	968
	Portland High Early Strength	26	59	39	47	40	49	50	57	46	40
	Cement Sulphate Resisting	71	24	6	6	1	1		1		
	other	82	54	67	155	226	85	17	199	253	283
	<b>Total</b>	<b>49,535</b>	<b>51,347</b>	<b>45,594</b>	<b>39,151</b>	<b>39,726</b>	<b>41,856</b>	<b>40,825</b>	<b>41,386</b>	<b>39,321</b>	<b>38,977</b>
Blended Cement	Blast Furnace Slag	5,979	7,847	8,736	8,046	9,473	10,326	10,828	8,740	8,099	9,272
<b>TOTAL</b>		<b>55,514</b>	<b>59,194</b>	<b>54,330</b>	<b>47,197</b>	<b>49,199</b>	<b>52,182</b>	<b>51,653</b>	<b>50,126</b>	<b>47,420</b>	<b>48,249</b>

## Proportion by Type of Cement



# Cement Sales

## Sales of the Companies

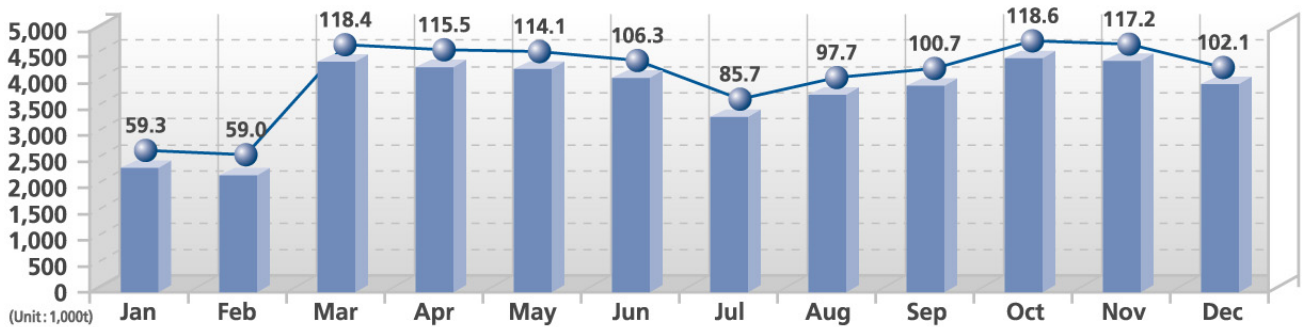
(Unit:1,000t)

	Tong Yang	Ssang yong	Hanil	Hyundai	Asia	Sung shin	Eugene Korea	Lafarge Halla	Han kook	Daehan	Other	TOTAL
2002	9,292	13,477	5,607	5,940	3,476	8,021	2,199	5,766	1,731	1,760	416	57,685
2003	9,832	14,378	5,970	6,059	3,548	8,571	2,249	6,089	1,868	1,952	933	61,449
2004	8,949	13,848	5,634	5,546	3,347	7,371	2,351	5,925	2,147	1,865	2,020	59,003
2005	7,987	12,906	4,424	4,714	2,789	6,047	2,035	6,234	1,605	1,485	2,029	52,255
2006	8,631	13,632	4,684	4,726	2,811	6,220	2,117	7,077	1,490	1,451	1,744	54,583
2007	8,897	13,923	5,432	5,170	3,079	6,681	2,109	7,242	1,447	1,622	1,540	57,142
2008	8,666	14,061	5,743	5,348	3,085	6,807	2,216	7,490	1,560	1,266	895	57,137
2009	7,923	13,611	5,730	4,939	3,086	6,249	1,930	7,094	1,466	755	259	53,042
2010	8,245	13,847	6,372	4,459	3,255	5,764	1,899	7,178	1,122	639	237	53,017
2011	9,422	14,386	5,912	4,364	3,072	5,131	2,285	7,708	1,402	834	50	54,566

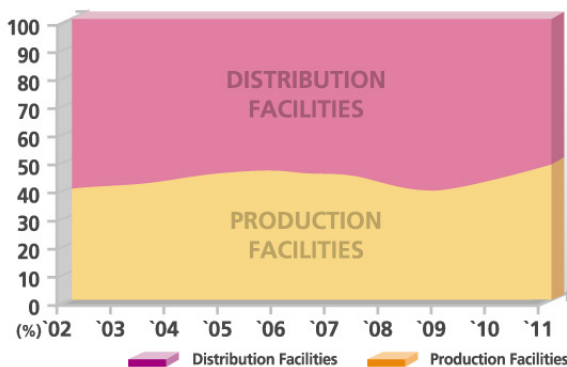
Exported clinker and Cement included.

## Seasonal Index for Cement Sales of 2011

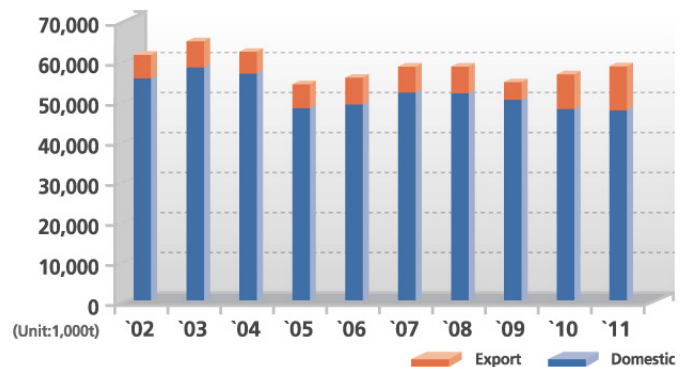
Cement Sale Seasonal Index [%]



## Sales by Type of Facilities



## Sales by Type of Demand



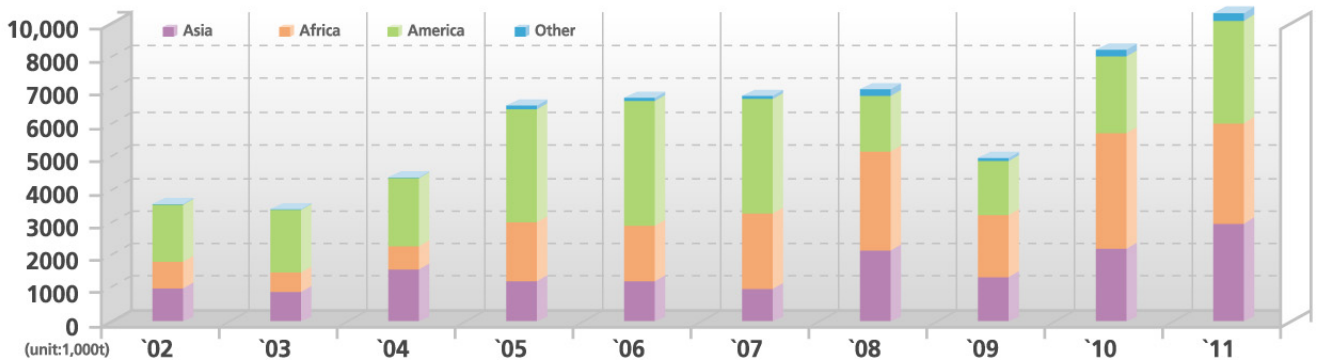


# Export & Import

## Export

Export include clinker.

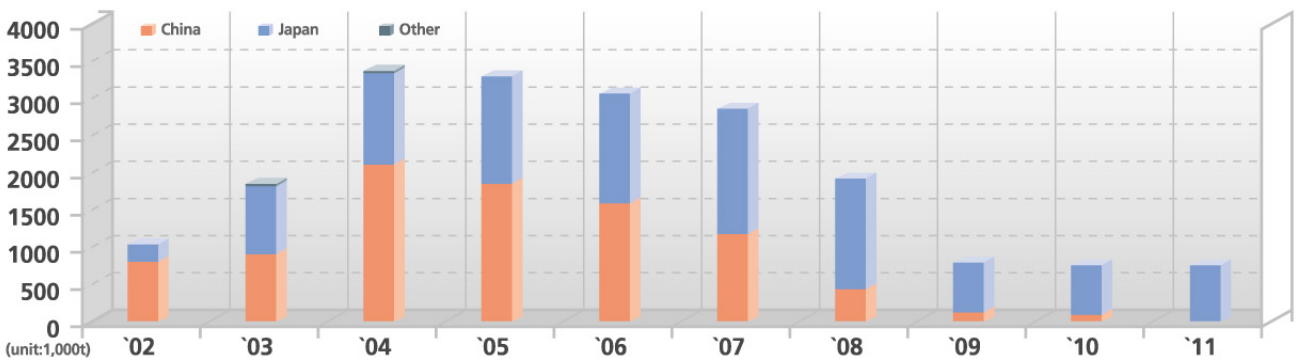
CONTINENT	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
ASIA	1,072	953	1,569	1,259	1,301	1,062	2,079	1,401	2,305	3,454
AFRICA	637	482	579	1,522	1,336	2,033	2,575	1,665	2,983	3,224
AMERICA	1,671	1,699	1,899	3,136	3,497	3,183	1,692	1,445	2,077	3,045
OTHER	13	13	14	53	63	64	154	61	159	242
<b>TOTAL</b>	<b>3,393</b>	<b>3,147</b>	<b>4,061</b>	<b>5,970</b>	<b>6,197</b>	<b>6,342</b>	<b>6,500</b>	<b>4,572</b>	<b>7,524</b>	<b>9,965</b>



## Import

Import include clinker.

COUNTRY	YEAR	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
ASIA	CHINA	860	983	2,207	1,905	1,659	1,271	522	120	80	2
	JAPAN	332	890	1,208	1,498	1,539	1,646	1,463	711	692	684
	OTHER		6	5							
<b>TOTAL</b>		<b>1,192</b>	<b>1,879</b>	<b>3,420</b>	<b>3,403</b>	<b>3,198</b>	<b>2,917</b>	<b>1,985</b>	<b>831</b>	<b>772</b>	<b>686</b>



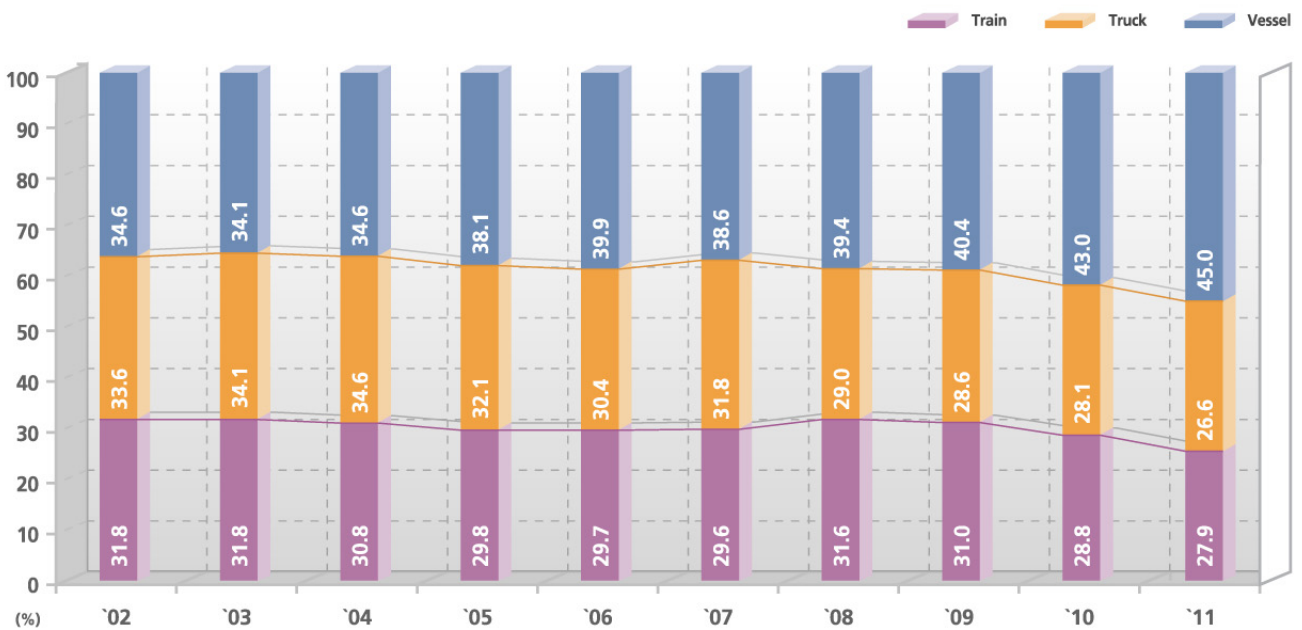


### Proportion by Type of Transportation

(unit:1,000t)

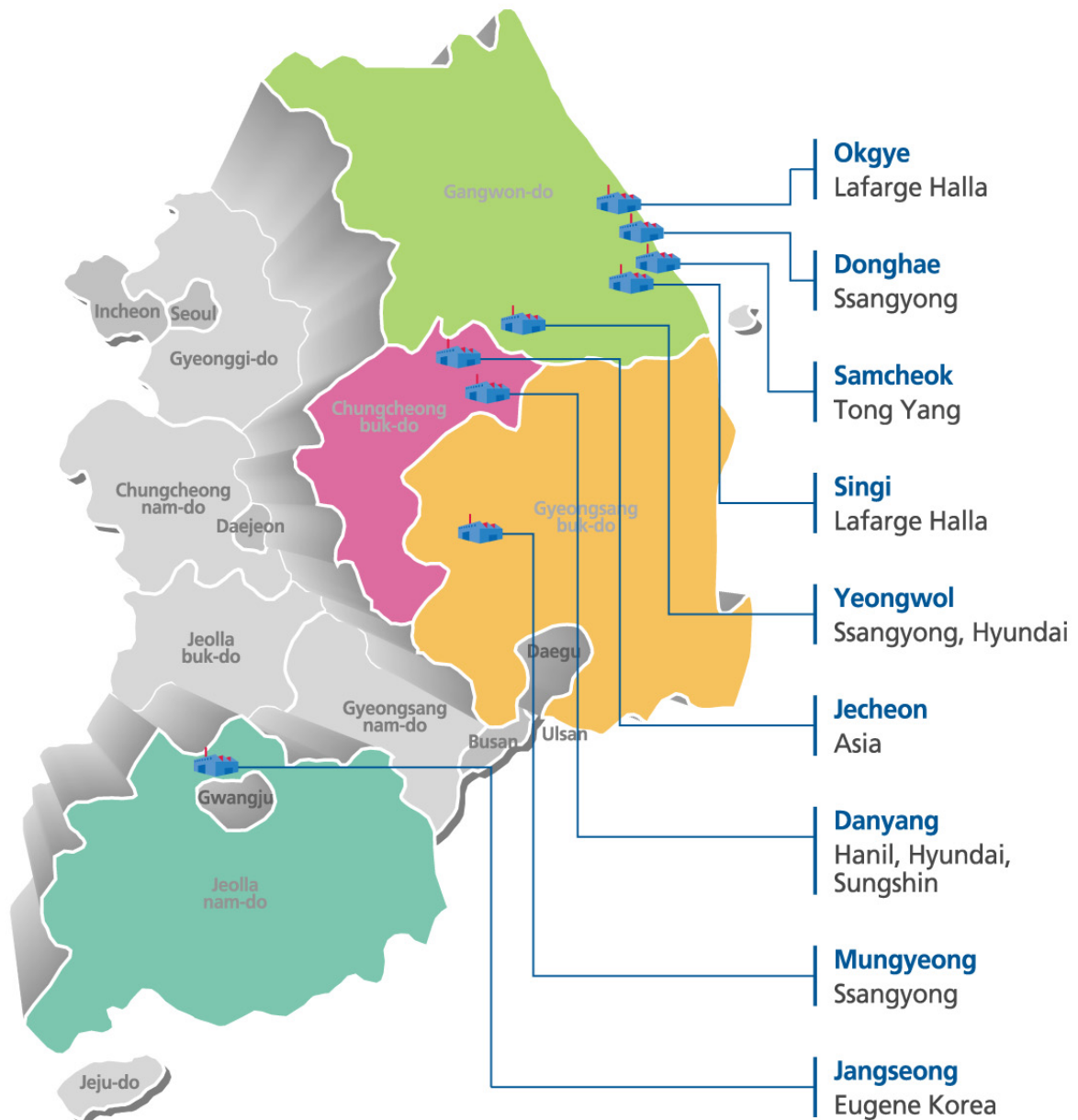
Year	Train		Truck		Vessel		Total
		%		%		%	
2002	18,398	31.8	19,605	33.6	20,393	34.6	58,396
2003	19,094	31.8	20,515	34.1	20,488	34.1	60,097
2004	17,465	30.8	19,575	34.6	19,593	34.6	56,633
2005	14,739	29.8	15,877	32.1	18,840	38.1	49,456
2006	15,182	29.7	15,494	30.4	20,361	39.9	51,037
2007	16,048	29.6	17,290	31.8	20,968	38.6	54,306
2008	17,161	31.6	15,699	29.0	21,366	39.4	54,226
2009	15,807	31.0	14,616	28.6	20,587	40.4	51,010
2010	14,596	28.8	14,240	28.1	21,766	43.0	50,602
2011	14,487	27.9	13,809	26.6	23,596	45.5	51,892

On the primary stage & export included.



# Location of Kiln Plants

## Kiln Plants





# World Cement Information

## 10 Leading Countries (2009)

(unit:1,000t)

Ranking	Production		Consumption		Ranking	Export	
01	China	1,650,000	China	1,622,216	01	Turkey	17,622
02	India	186,930	India	185,072	02	China	15,611
03	USA	63,929	USA	70,530	03	Thailand	14,406
04	Japan	54,927	Brazil	51,892	04	Japan	10,720
05	Turkey	53,973	<b>Korea</b>	<b>48,470</b>	05	Pakistan	10,261
06	Brazil	51,414	Egypt	47,949	06	Taiwan	8,174
<b>07</b>	<b>Korea</b>	<b>50,126</b>	Vietnam	47,879	07	Germany	7,015
08	Iran	48,800	Iran	47,811	08	India	5,670
09	Vietnam	47,700	Japan	44,308	<b>09</b>	<b>Korea</b>	<b>4,572</b>
10	Egypt	46,941	Russian Federation	44,042	10	Indonesia	4,447
	<b>Total</b>	<b>2,254,740</b>	<b>Total</b>	<b>2,210,169</b>		<b>Total</b>	<b>98,498</b>

Source : European Cement Association(CEMBUREAU)


## By Regional Groups (2009)

(unit:1,000t)

	Production	Import	Export	Consumtion		Production	Import	Export	Consumtion
<b>AFRICA</b>	<b>145,884</b>	<b>26,787</b>	<b>6,907</b>	<b>160,944</b>	<b>EUROPE</b>	<b>269,365</b>	<b>26,867</b>	<b>49,448</b>	<b>255,283</b>
North Africa	93,966	3,577	3,468	95,512	<b>CIS</b>	<b>76,232</b>	<b>7,958</b>	<b>4,872</b>	<b>78,707</b>
East Africa	11,571	5,922	1,169	15,568	<b>OCEANIA</b>	<b>10,321</b>	<b>2,610</b>	<b>170</b>	<b>11,242</b>
Southern Africa	14,790	2,264	711	16,036	<b>ASIA</b>	<b>2,303,046</b>	<b>50,297</b>	<b>82,790</b>	<b>2,266,547</b>
West Africa	25,558	15,024	1,559	33,828	West Asia	144,937	21,415	3,851	156,869
<b>AMERICA</b>	<b>228,266</b>	<b>13,682</b>	<b>9,296</b>	<b>232,014</b>	South West Asia	229,577	8,447	16,361	225,777
North America	74,914	7,721	4,442	79,517	South East Asia	134,805	13,047	22,894	134,341
Central America	44,994	1,795	1,562	44,443	East Asia	1,793,727	7,388	39,685	1,749,561
West Indies	9,097	1,106	1,569	8,291	<b>Total World</b>	<b>3,033,115</b>	<b>128,201</b>	<b>153,483</b>	<b>3,004,738</b>
East Coast South America	70,562	1,420	938	71,314					
West Coast South America	28,699	1,640	784	28,449					

Source : European Cement Association(CEMBUREAU)

# Member of the Companies

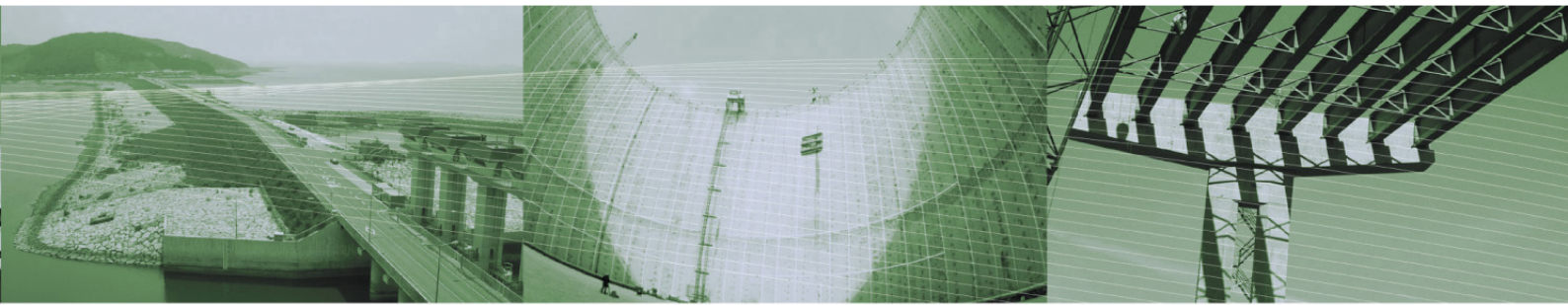
Company name		TONG YANG CEMENT CORPORATION		
Head Office	Tongyanggil 20, Samcheok-si, Gangwon-do 245-150			
CEO	Lee, Chang-Ki	No. of Employees	8004	
Establishment	June 15, 1957	Clinker Capacity	10,045 (1000ton)	
Assets	1,445(billion won)	Kiln plants(mill plants)	1(3)	
Contact Information	Tel:82-2-3770-3000 Fax:82-2-3770-3305 <a href="http://www.tycement.com">http://www.tycement.com</a>			

Company name		SSANGYONG CEMENT CO., LTD.		
Head Office	24-1, 2Ga, Jeo-Dong, Jung-Gu, Seoul 100-748			
CEO	Kim, Yong-Sik	No. of Employees	1,018	
Establishment	May 14, 1962	Clinker Capacity	15,326 (1000ton)	
Assets	2,409(billion won)	Kiln plants(mill plants)	3(6)	
Contact Information	Tel:82-2-2270-5114 Fax:82-2-2275-7040 <a href="http://www.ssy.co.kr">http://www.ssy.co.kr</a>			

Company name		HANIL CEMENT CO., LTD.		
Head Office	832-2, Yeoksam-Dong, Gangnam-Gu, Seoul 135-750			
CEO	Won, In-Sang	No. of Employees	651	
Establishment	December 28, 1961	Clinker Capacity	7,131 (1000ton)	
Assets	1,981(billion won)	Kiln plants(mill plants)	1(5)	
Contact Information	Tel:82-2-531-7000 Fax:82-2-531-7115 <a href="http://www.hanil.com">http://www.hanil.com</a>			

Company name		HYUNDAI CEMENT CO., LTD.		
Head Office	1321-11, sucho-Dong, Sucho-Gu, Seoul 135-070			
CEO	Lee, Joo-Hwan	No. of Employees	414	
Establishment	September 15, 1963	Clinker Capacity	6,864 (1000ton)	
Assets	604(billion won)	Kiln plants(mill plants)	2(3)	
Contact Information	Tel:82-2-520-2114 Fax:82-2-520-2118 <a href="http://www.hdcement.co.kr">http://www.hdcement.co.kr</a>			

Company name		ASIA CEMENT CO., LTD.		
Head Office	726, Yeoksam-Dong, Gangnam-Gu, Seoul 135-719			
CEO	Ko, Kyu-Hwan	No. of Employees	471	
Establishment	April 26, 1957	Clinker Capacity	4,146 (1000ton)	
Assets	929(billion won)	Kiln plants(mill plants)	1(2)	
Contact Information	Tel:82-2-527-6400 Fax:82-2-527-6532 <a href="http://www.asiacement.co.kr">http://www.asiacement.co.kr</a>			



Company name		SUNGSHIN CEMENT CO., LTD.	
Head Office	194-27, Insa-Dong, Jongro-Gu, Seoul 110-778		
CEO	Kim, Young-Chan	No. of Employees	686
Establishment	March, 16 1967	Clinker Capacity	9,686 (1000ton)
Assets	1,143(billion won)	Kiln plants(mill plants)	1(2)
Contact Information	Tel:82-2-3782-7000 Fax:82-2-3782-7049 <a href="http://www.sungshincement.co.kr">http://www.sungshincement.co.kr</a>		



Company name		LAFARGE HALLA CEMENT CORPORATION	
Head Office	280-1, Sangye-Ri, Okgye-Myeon, Gangneung-Si, Gangwon-Do 210-834		
CEO	Michel Pucheros	No. of Employees	508
Establishment	December 27, 1998	Clinker Capacity	8,184 (1000ton)
Assets	501(billion won)	Kiln plants(mill plants)	2(3)
Contact Information	Tel:82-33-534-1000 Fax:82-33-534-0716 <a href="http://www.lafargehalla.com">http://www.lafargehalla.com</a>		



Company name		EUGENE KOREA CEMENT CO., LTD.	
Head Office	497 Gongdeok-dong, Mapo-gu, Seoul 121-805		
CEO	Chung, Jin-Hak	No. of Employees	176
Establishment	December 28, 1962	Clinker Capacity	660 (1000ton)
Assets	1,633(billion won)	Kiln plants(mill plants)	1(2)
Contact Information	Tel:82-2-3704-3300 Fax:82-2-3704-3388 <a href="http://www.eugenes.co.kr">http://www.eugenes.co.kr</a>		



Company name		HANKOOK CEMENT & TEXTILE CO., LTD.	
Head Office	699-2, Jungheung-Dong, Buk-Gu, Gwangju-Si 500-724		
CEO	Kim, Hoon-Seok	No. of Employees	202
Establishment	February 18, 1976	Clinker Capacity	NIX (1,000ton)
Assets	118(billion won)	Kiln plants(mill plants)	(1)
Contact Information	Tel:82-62-519-1600 Fax:82-62-527-1734 <a href="http://www.hcnt.co.kr">http://www.hcnt.co.kr</a>		



Company name		UNION CORPORATION	
Head Office	50, Sogong-Dong, Jung-Gu, Seoul 100-718		
CEO	Kang, Byeong-Ho	No. of Employees	257
Establishment	December 6, 1952	*Clinker Capacity	145 (1000ton)
Assets	324(billion won)	Kiln plants(mill plants)	1(1)
Contact Information	Tel:82-2-757-3801 Fax:82-2-757-3807 ~ 8 <a href="http://www.union21.co.kr">http://www.union21.co.kr</a>		



\*Clinker for White Cement

## Introduction to the Korea Cement Association

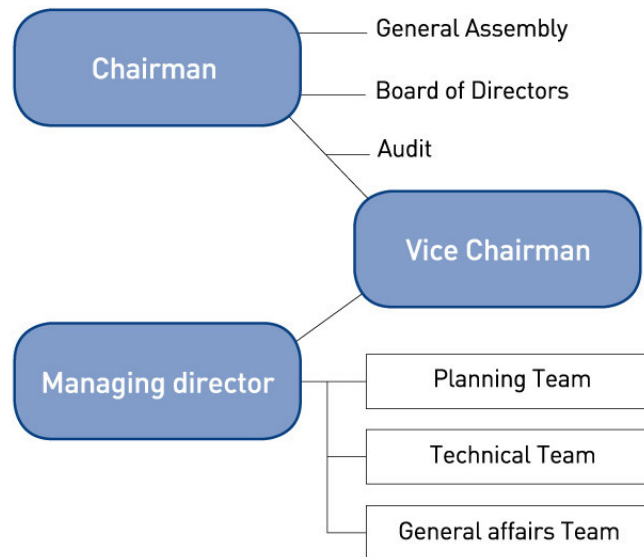
### History

July 1st, 1963, established under Civil Code Section 32  
January 1st, 2011, Korea Cement Industrial Association changed the company name to Korea Cement Association

### Objective

Promoting the welfare of members and developing cement industry

### Organization Chart



KOREA CEMENT ASSOCIATION

16th Fl. Samil Plaza BLDG, 837-26, Yeoksam-1Dong, Gangnam-Gu, Seoul, Korea 135-768

Tel: 82.2.538.8235 Fax: 82.2.538.1720 <http://www.cement.or.kr>