

Korea Cement Association

History

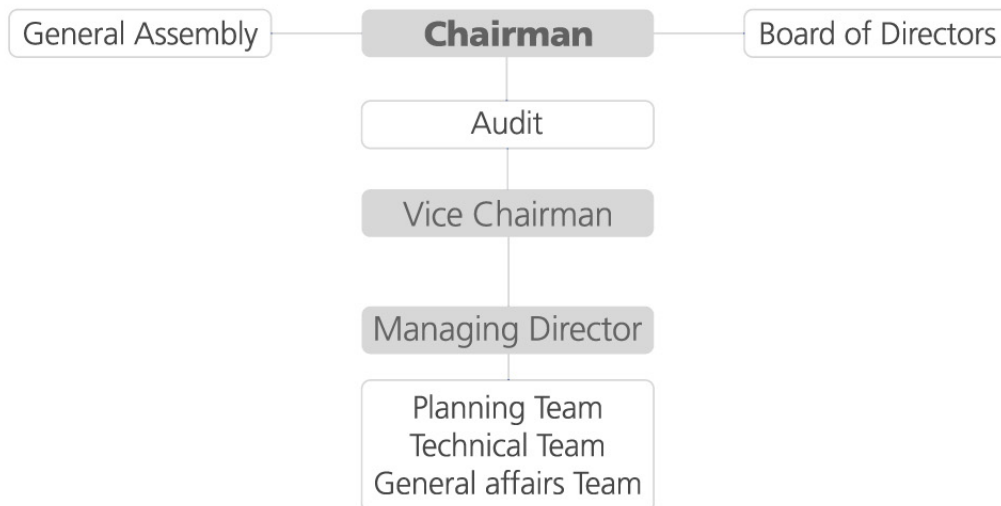
July 1st, 1963, established under Civil Code Section 32

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, 14, Dogok-ro 1-gil, Gangnam-gu, Seoul, Korea

Tel : 82-2-538-8235

Fax : 82-2-538-1720

<http://www.cement.or.kr>



2013
**CEMENT
IN KOREA**

Korea Cement Association



2013

**CEMENT
IN KOREA**

Korea Cement Association

Outline of Industry

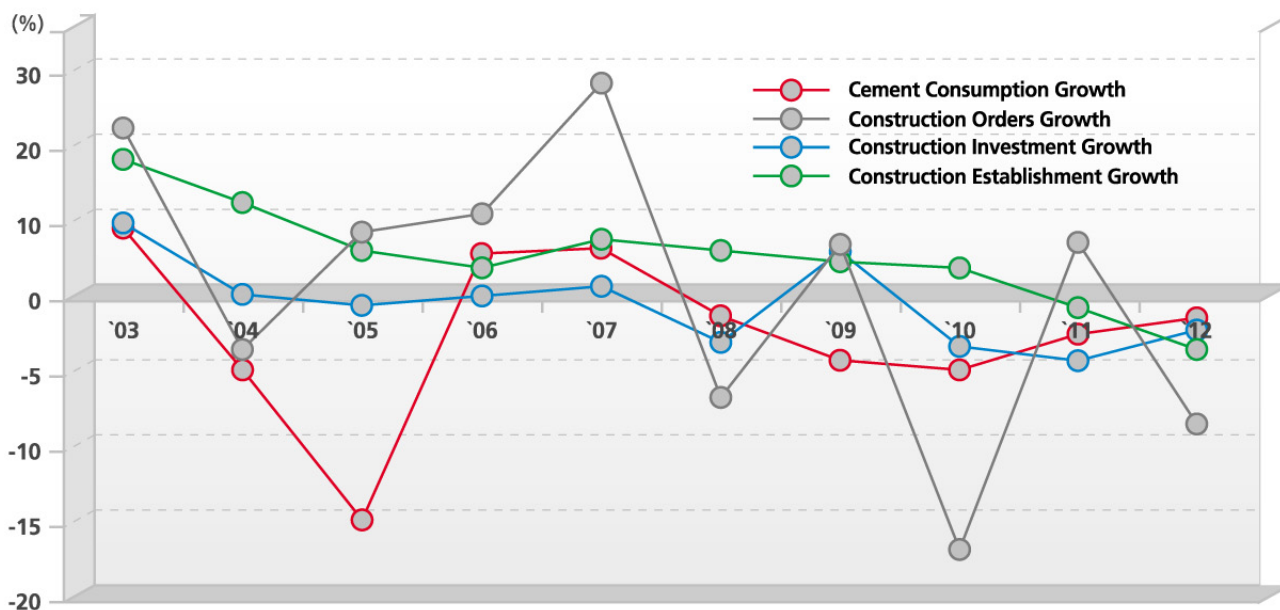
Member of the Companies (2012)

No. of Companies	9
No. of Kiln Plants	12
No. of Grinding Plants	23
No. of Kilns	48
Assets (Billion Won)	9,507
Cement Production (1,000t)* #	46,862
Domestic Consumption (1,000t)* #	43,939
No. Of Employees	4,985
No. of Distribution Terminals(Silos)#	84(151)
Terminal Capacity (1,000t)#	1,078

* White cement not included.

Non-member companies are included.

Cement Consumption Growth & Construction Index Growth



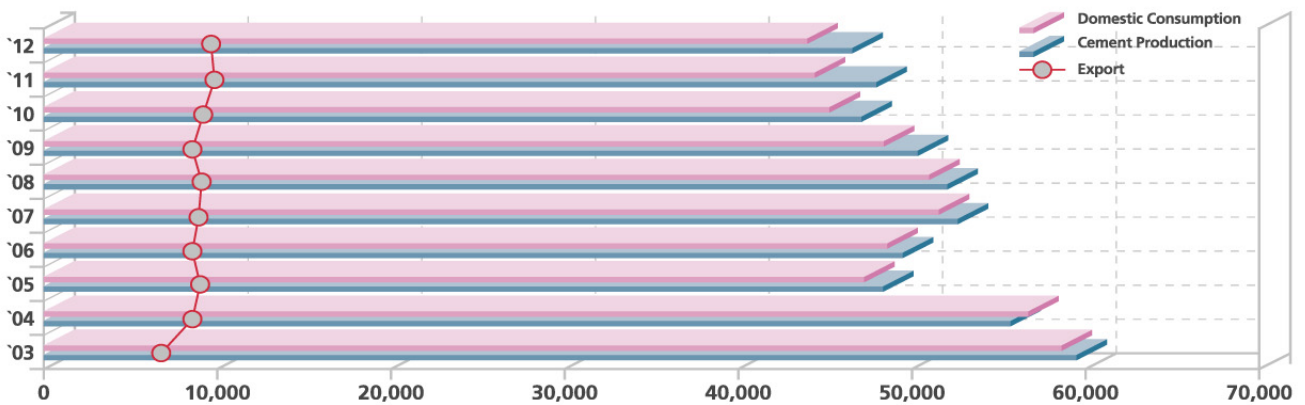
Supply & Demand

Production & Sales & Consumption

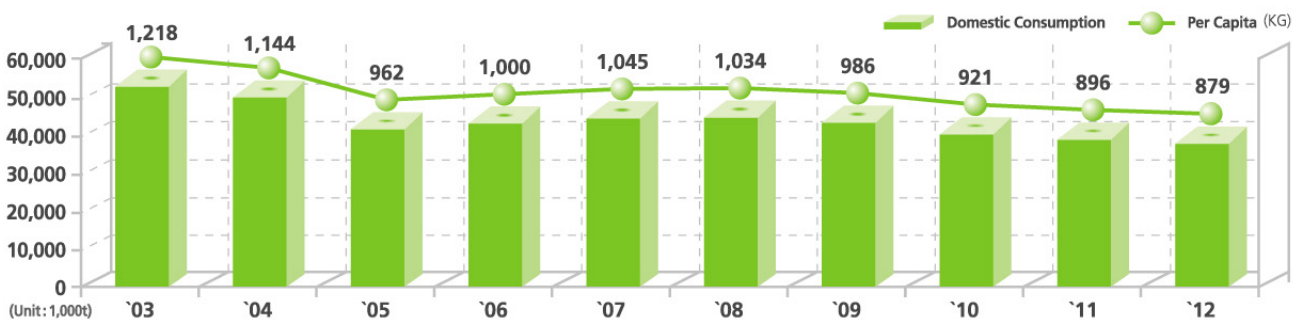
(Unit:1,000t)

Year	Cement Production*		Sales						Import		Domestic Consumption	
		%	Domestic	%	Export	%	Total	%		%		%
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
2004	54,330	91.8	51,522	91.3	4,061	129.0	55,583	93.3	3,420	182.0	54,942	94.2
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
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
2007	52,182	106.1	47,884	106.0	6,341	102.3	54,225	105.5	2,917	91.2	50,801	105.0
2008	51,653	99.0	48,652	101.6	6,500	102.5	55,152	101.7	1,985	68.0	50,637	99.7
2009	50,126	97.0	47,639	97.9	4,572	70.3	52,211	94.7	831	41.9	48,470	95.7
2010	47,420	94.6	44,721	93.9	7,524	164.6	52,245	100.1	772	92.9	45,493	93.9
2011	48,249	101.7	43,915	98.2	9,965	132.4	53,880	103.1	686	88.9	44,601	98.0
2012	46,862	97.1	43,209	98.4	8,883	89.1	52,092	96.7	730	106.4	43,939	98.5

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



Per Capita Consumption of Cement



Cement Production

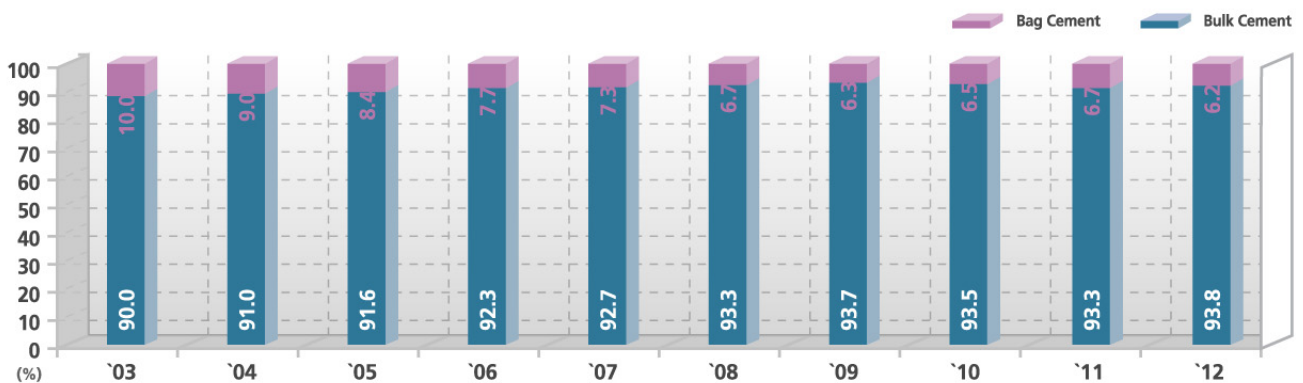
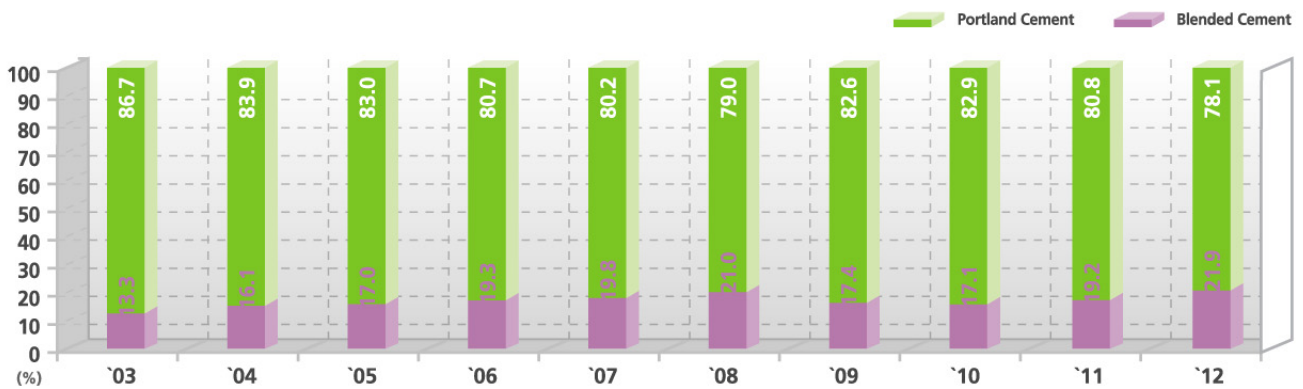
Classified by Type of Cement

(unit:1,000t)

Type		2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Portland Cement	Ordinary	49,465	43,772	36,952	37,597	39,564	39,666	40,225	38,376	37,668	35,597
	Other	1,882	1,822	2,199	2,129	2,292	1,159	1,161	945	1,309	1,006
Blended Cement	Blast Furnace Slag	7,847	8,736	8,046	9,473	10,326	10,828	8,740	8,099	9,272	10,259
TOTAL		59,194	54,330	47,197	49,199	52,182	51,653	50,126	47,420	48,249	46,862

other = Sum of the Moderate Heat, Portland High Early Strength, Cement Sulphate Resisting, etc.

Proportion by Type of Cement



Cement Sales

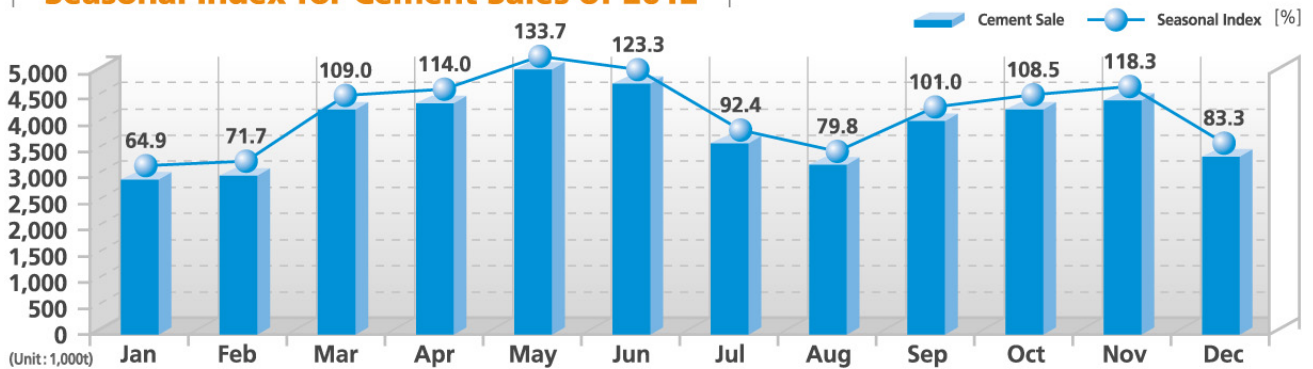
Sales of the Companies

(Unit:1,000t)

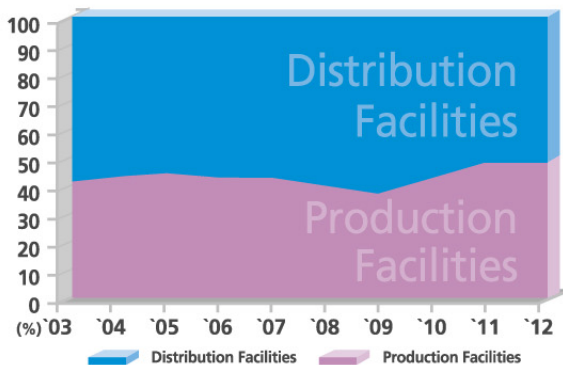
	Tong Yang	Ssang yong	Hanil	Hyundai	Asia	Sung shin	Lafarge Halla	Han kook	Other	TOTAL
2003	9,832	14,378	5,970	6,059	3,548	8,571	6,089	1,868	5,134	61,449
2004	8,949	13,848	5,634	5,546	3,347	7,371	5,925	2,147	6,236	59,003
2005	7,987	12,906	4,424	4,714	2,789	6,047	6,234	1,605	5,549	52,255
2006	8,631	13,632	4,684	4,726	2,811	6,220	7,077	1,490	5,312	54,583
2007	8,897	13,923	5,432	5,170	3,079	6,681	7,242	1,447	5,271	57,142
2008	8,666	14,061	5,743	5,348	3,085	6,807	7,490	1,560	4,377	57,137
2009	7,923	13,611	5,730	4,939	3,086	6,249	7,094	1,466	2,944	53,042
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

Exported clinker and Cement included.

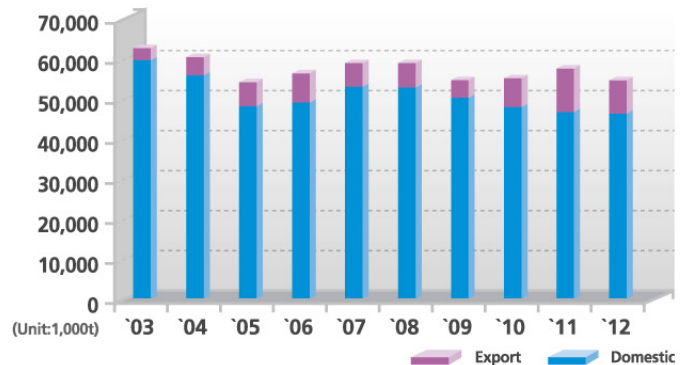
Seasonal Index for Cement Sales of 2012



Sales by Type of Facilities



Sales by Type of Demand



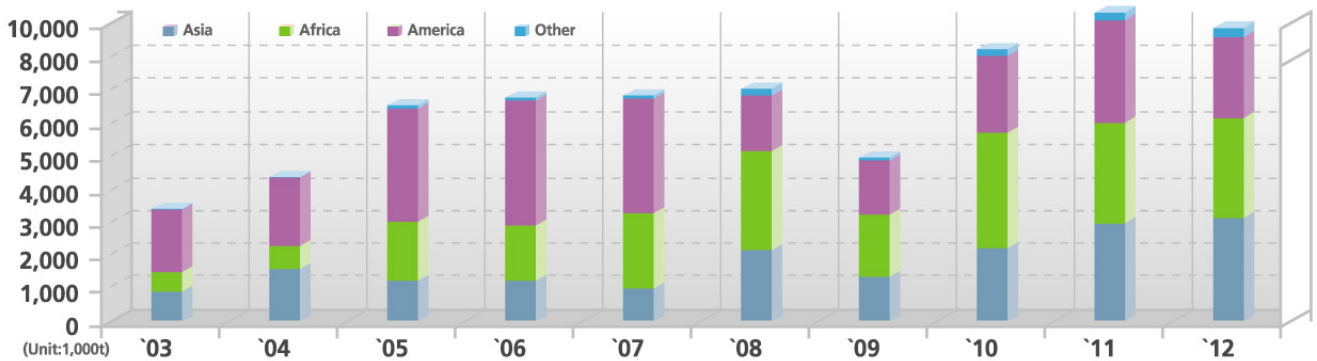


Export & Import

Export

CONTINENT	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
ASIA	953	1,569	1,259	1,301	1,062	2,079	1,401	2,305	3,454	2,824
AFRICA	482	579	1,522	1,336	2,033	2,575	1,665	2,983	3,224	2,383
AMERICA	1,699	1,899	3,136	3,497	3,183	1,692	1,445	2,077	3,045	3,411
OTHER	13	14	53	63	64	154	61	159	242	265
TOTAL	3,147	4,061	5,970	6,197	6,342	6,500	4,572	7,524	9,965	8,883

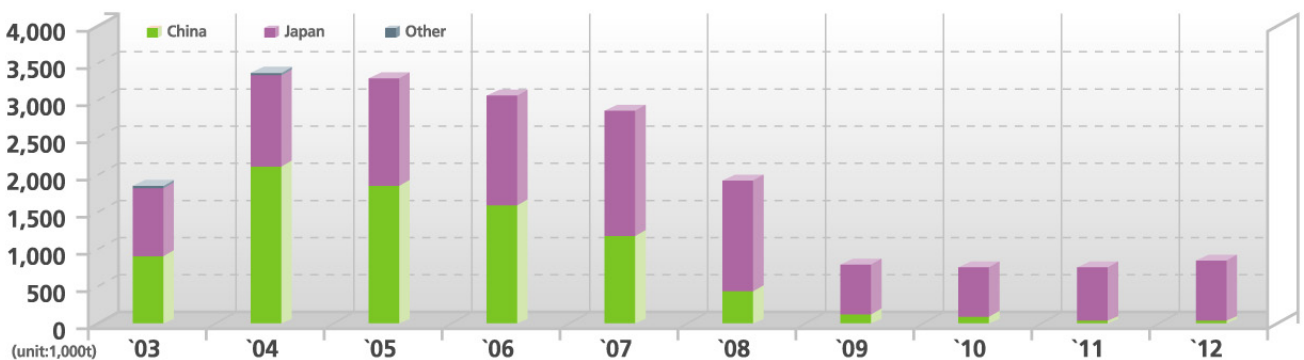
Export include clinker.



Import

Import include clinker.

COUNTRY	YEAR	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
		ASIA	CHINA	983	2,207	1,905	1,659	1,271	522	120	80
	JAPAN	890	1,208	1,498	1,539	1,646	1,463	711	692	684	719
	OTHER	6	5								
TOTAL		1,879	3,420	3,403	3,198	2,917	1,985	831	772	686	730



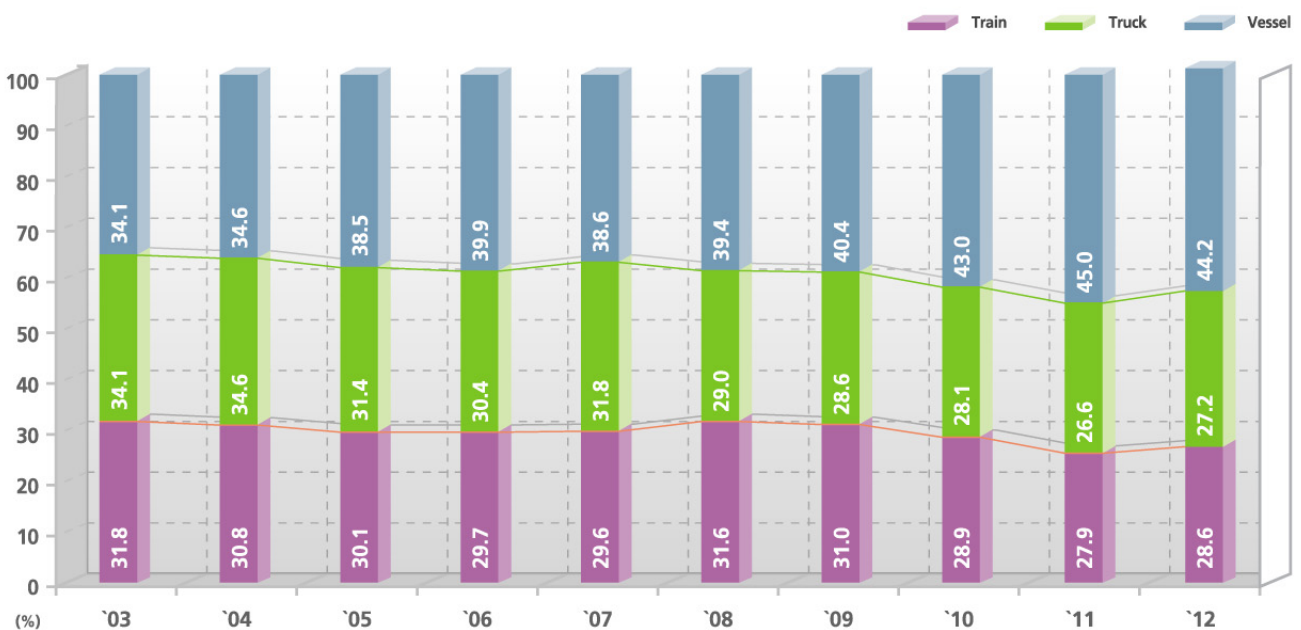


Proportion by Type of Transportation

(Unit:1,000t)

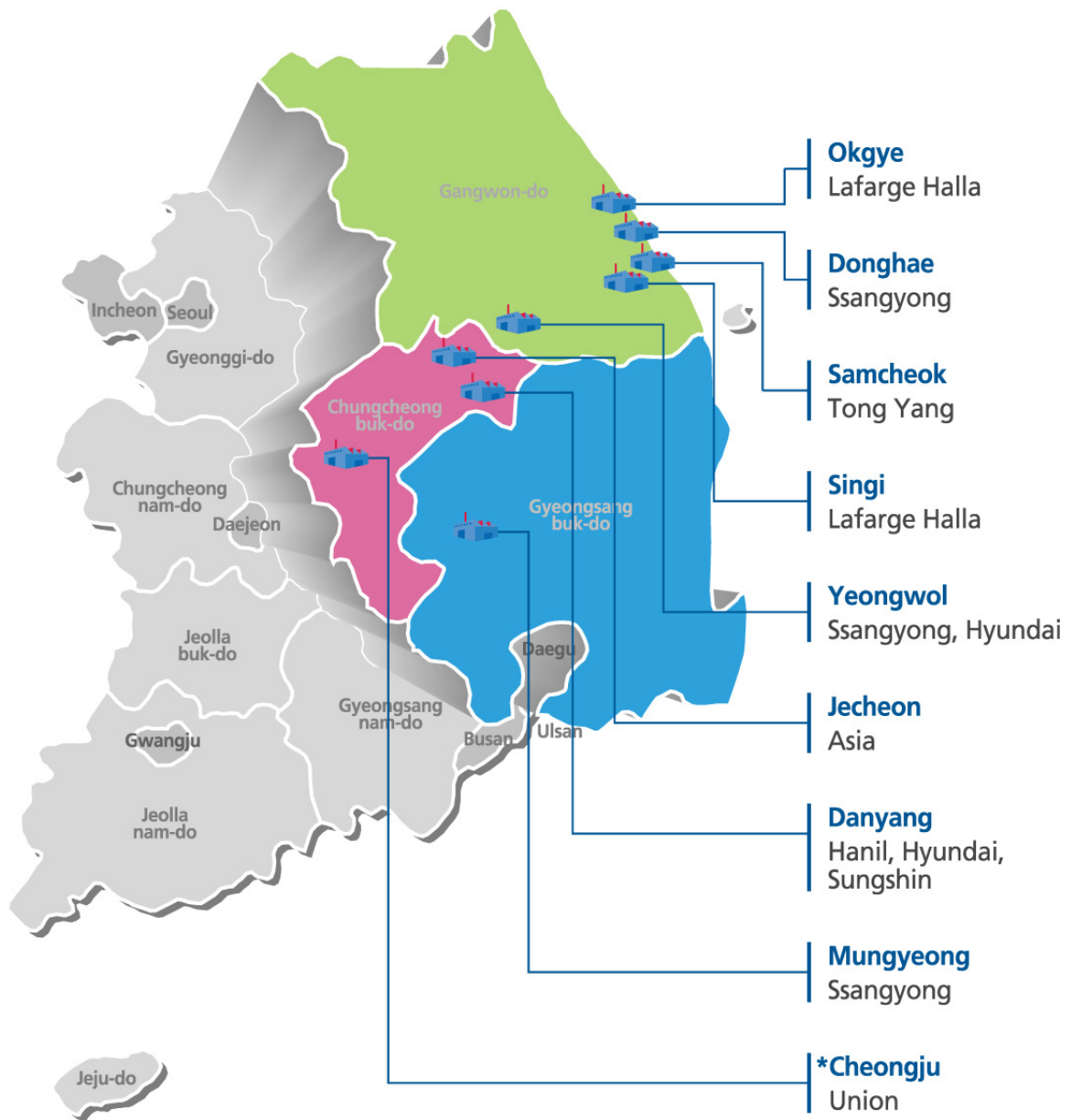
Year	Train		Truck		Vessel		Total
		%		%		%	
2003	19,094	31.8	20,515	34.1	20,489	34.1	60,098
2004	17,465	30.8	19,575	34.6	19,593	34.6	56,633
2005	14,741	30.1	15,361	31.4	18,874	38.5	48,976
2006	15,182	29.7	15,494	30.4	20,361	39.9	51,037
2007	16,048	29.6	17,290	31.8	20,968	38.6	54,306
2008	17,161	31.6	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	28.9	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
2012	14,409	28.6	13,672	27.2	22,282	44.2	50,363

On the primary stage & export included.



Location of Kiln Plants

Kiln Plants



* Kiln for white cement

World Cement Information

10 Leading Countries (2010)

(Unit:1,000t)

Ranking	Production		Consumption		Ranking	Export	
01	China	1,881,912	China	1,872,921	1	Turkey	17,838
02	India	220,000	India	218,746	2	China	16,163
03	U.S.A.	62,800	U.S.A.	69,500	3	Thailand	13,608
04	Turkey	62,737	Brazil	60,008	4	Pakistan	10,365
05	Iran	60,800	Vietnam	55,000	5	Japan	10,265
06	Brazil	59,117	Egypt	53,865	6	Iran	7,600
07	Vietnam	56,400	Iran	53,778	7	Korea	7,524
08	Japan	51,526	Russian Federation	50,863	8	Germany	7,301
09	Russian Federation	50,388	Turkey	47,720	9	Taiwan	7,211
10	Korea	47,420	Korea	45,493	10	India	5,022
	Total	2,254,740	Total	2,210,169		Total	98,498

Source : European Cement Association(CEMBUREAU)


By Regional Groups (2010)


(Unit:1,000t)


	Production	Import	Export	Consumption		Production	Import	Export	Consumption
EUROPE	268,611	25,477	53,489	247,012	AMERICA	240,511	14,713	9,148	244,224
Cembureau	257,720	22,254	50,462	235,815	North America	77,670	7,849	4,606	80,144
Non Cembureau	10,891	3,223	3,027	11,197	Central America	46,268	1,359	1,308	41,200
CIS	83,069	7,279	3,728	87,496	West Indies	9,224	1,111	2,264	13,029
OCEANIA	10,685	3,119	187	12,028	East Coast	77,990	2,790	677	79,753
ASIA	2,596,839	49,204	90,465	2,584,795	South America	29,359	1,604	292	30,098
West Asia	162,795	21,314	12,696	171,722	Total World	3,343,548	132,478	163,246	3,353,297
South West Asia	259,180	11,152	15,751	268,897					
South East Asia	154,429	9,016	20,162	146,856					
East Asia	2,020,435	7,722	41,857	1,997,320					
AFRICA	143,833	32,687	6,229	177,742					
North Africa	91,504	10,931	1,896	108,003					
East Africa	13,196	4,343	1,230	17,004					
Southern Africa	14,130	1,382	1,088	15,000					
West Africa	25,003	16,031	2,015	37,735					


Source : European Cement Association(CEMBUREAU)


Member of the Companies

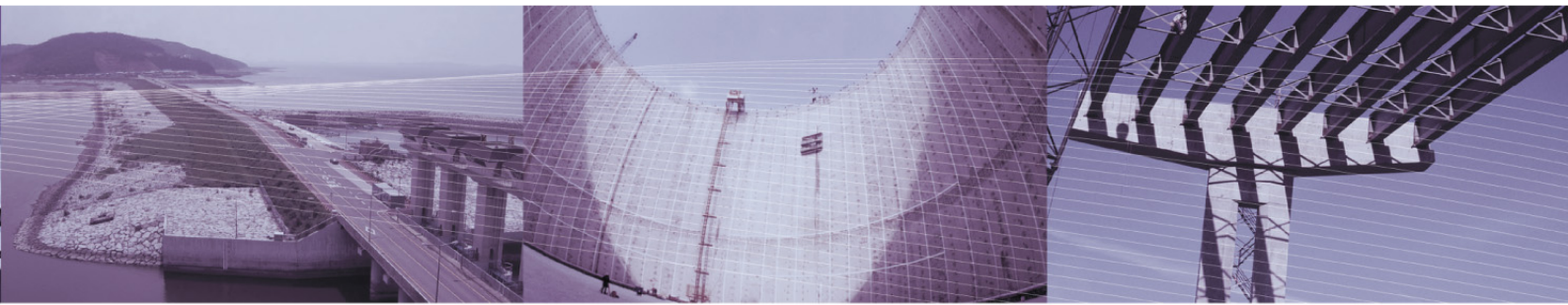
Company name		TONG YANG CEMENT CORPORATION		
Head Office	Tongyangil 20, Samcheok-si, Gangwon-do 245-150			
CEO	Kim, Jong-Ho	No. of Employees	858	
Establishment	June 15, 1957	Clinker Capacity	10,045 (1,000ton)	
Assets	1,384(billion won)	Kiln plants(mill plants)	1(3)	
Contact Information	Tel:82-33-571-7000 Fax:82-33-572-5541 http://www.tycement.com			

Company name		SSANGYONG CEMENT CO., LTD.		
Head Office	Ssangyong Bldg., 34, Supyo-ro, Jung-gu, Seoul 100-192			
CEO	Lee, Yoon-Ho	No. of Employees	1,015	
Establishment	May 14, 1962	Clinker Capacity	15,326 (1,000ton)	
Assets	2,506(billion won)	Kiln plants(mill plants)	3(5)	
Contact Information	Tel:82-2-2270-5114 Fax:82-2-2270-7040 http://www.ssys.co.kr			


Company name		HANIL CEMENT CO., LTD.		
Head Office	Udeok Bldg., 330, Gangnam-daero, Gangnam-gu, Seoul 135-750			
CEO	Won, In-Sang	No. of Employees	634	
Establishment	December 28, 1961	Clinker Capacity	7,131 (1,000ton)	
Assets	1,937(billion won)	Kiln plants(mill plants)	1(3)	
Contact Information	Tel:82-2-531-7000 Fax:82-2-531-7115 http://www.hanil.com			


Company name		HYUNDAI CEMENT CO., LTD.		
Head Office	398, Seocho-daero, Seocho-gu, Seoul 137-857			
CEO	Lee, Joo-Hwan	No. of Employees	396	
Establishment	September 15, 1963	Clinker Capacity	6,864 (1,000ton)	
Assets	534(billion won)	Kiln plants(mill plants)	2(3)	
Contact Information	Tel:82-2-520-2114 Fax:82-2-520-2118 http://www.hdcement.co.kr			


Company name		ASIA CEMENT CO., LTD.		
Head Office	Asia Tower Bldg., 430, Nonhyeon-ro, Gangnam-gu, Seoul 135-719			
CEO	Lee, Hoon-Beom	No. of Employees	469	
Establishment	November 20, 1965	Clinker Capacity	4,146 (1,000ton)	
Assets	907(billion won)	Kiln plants(mill plants)	1(2)	
Contact Information	Tel:82-2-527-6500 Fax:82-2-527-6699 http://www.asiacement.co.kr			



Company name	SUNGSHIN CEMENT CO., LTD.			
Head Office	Taehwa Bldg., 29, Insadong 5-gil, Jongno-gu, Seoul 110-778			
CEO	Kim, Young-Chan	No. of Employees	661	
Establishment	March 16, 1967	Clinker Capacity	9,686 (1,000ton)	
Assets	1,115(billion won)	Kiln plants(mill plants)	1(2)	
Contact Information	Tel:82-2-3782-7000 Fax:82-2-3782-7049 http://www.sungshincement.co.kr			

Company name	LAFARGE HALLA CEMENT CORPORATION			
Head Office	225, San-gye-ri, Okgye-myeon, Gangneung-si, Gangwon-do 210-834			
CEO	Michel Pucheros	No. of Employees	508	
Establishment	January 27, 1978	Clinker Capacity	8,184 (1,000ton)	
Assets	532(billion won)	Kiln plants(mill plants)	2(3)	
Contact Information	Tel:82-33-534-1000 Fax:82-33-534-0716 http://www.lafargehalla.com			

Company name	HANKOOK CEMENT & TEXTILE CO., LTD.			
Head Office	239, Mudeung-ro, Buk-gu, Gwangju 500-724			
CEO	Kim, Hoon-Seok	No. of Employees	187	
Establishment	February 18, 1976	Clinker Capacity	NIX (1,000ton)	
Assets	150(billion won)	Kiln plants(mill plants)	(1)	
Contact Information	Tel:82-62-519-1600 Fax:82-62-527-1734 http://www.hcnc.co.kr			

Company name	UNION CORPORATION			
Head Office	OCI Company Ltd., 94, Sogong-ro, Jung-gu 100-718			
CEO	Kang Byeong-Ho	No. of Employees	257	
Establishment	December 6, 1952	*Clinker Capacity	145 (1,000ton)	
Assets	443(billion won)	Kiln plants(mill plants)	1(1)	
Contact Information	Tel:82-2-757-3801 Fax:82-2-757-3807 ~ 8 http://www.union21.co.kr			

*Clinker for White Cement