

# CEMENT IN KOREA

2014 Korea Cement Association





# Outline of Industry

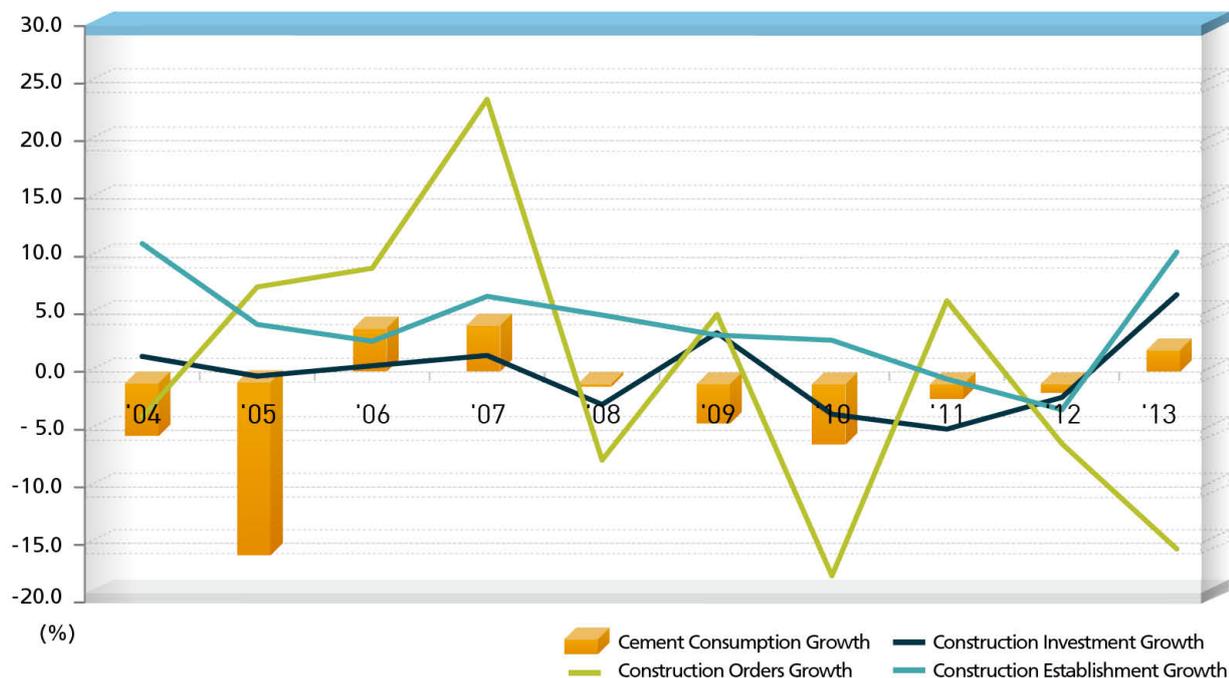
## Scale of Cement Industry (2013)

No. of Companies	9
No. of Kiln Plants	12
No. of Grinding Plants	23
No. of Kilns	49
Assets (Billion Won)	9,017
Cement Production (1,000t) * #	47,291
Domestic Consumption (1,000t) * #	45,174
No. of Employees	4,897
No. of Distribution Terminals(Silos)	79(165)
Terminal Capacity (1,000t)	1,110

\* White cement not included.

# Non-member Companies are included.

## Cement Consumption Growth & Construction Index Growth



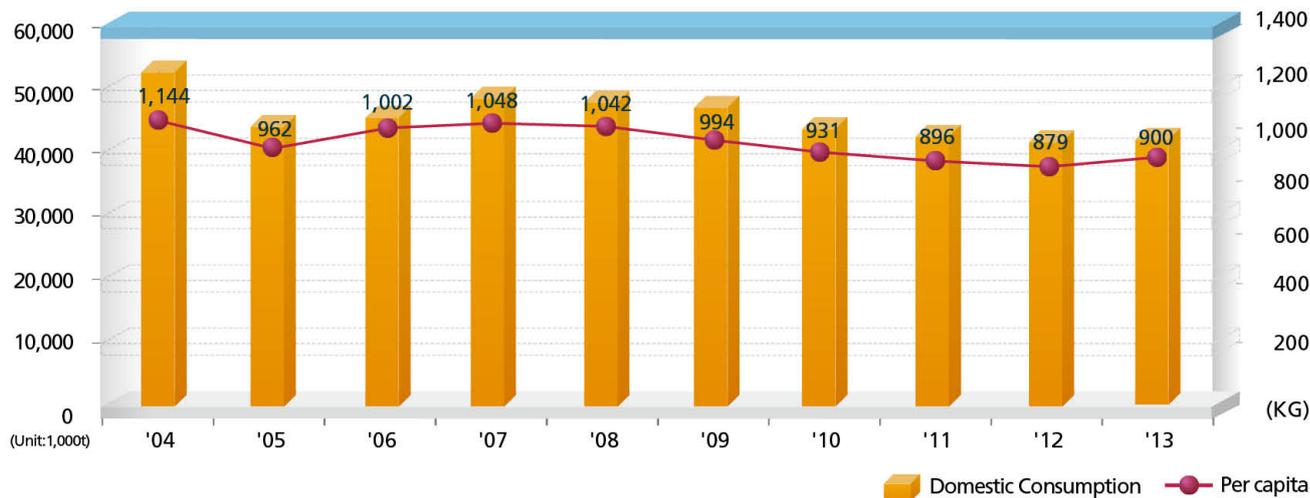
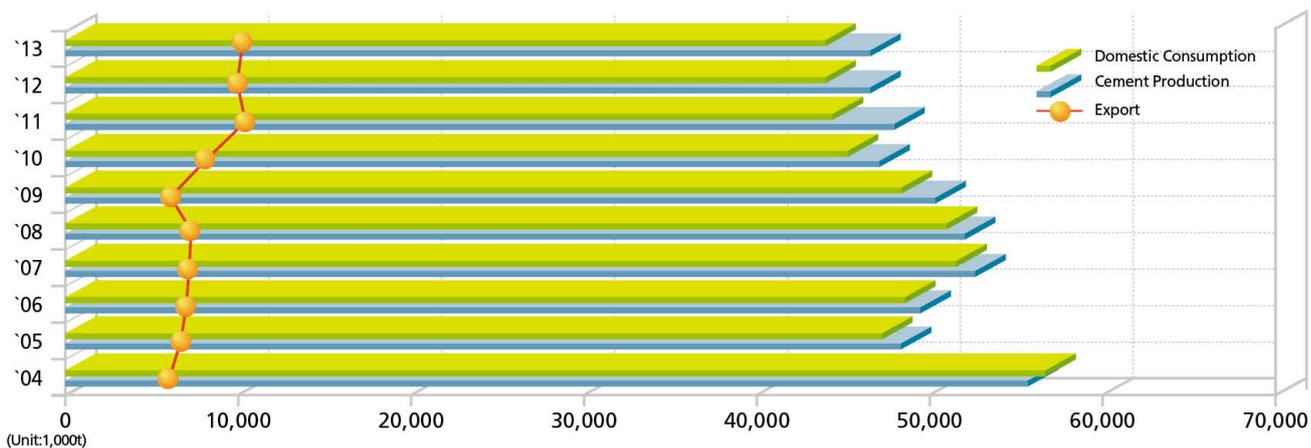


# Supply & Demand

## Production & Sales & Consumption

Year	Cement Production*		Sales						Import		Domestic Consumption		Per Capita (kg)
	(Unit:1,000t)	%	Domestic	%	Export	%	Total	%	(Unit:1,000t)	%	(Unit:1,000t)	%	
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	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	1,002
2007	52,182	106.1	47,883	106.0	6,342	102.3	53,225	105.5	2,917	91.2	50,801	105.0	1,048
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	1,042
2009	50,126	97.0	47,639	97.9	4,572	70.3	52,211	94.7	831	41.9	48,470	95.7	994
2010	47,420	94.6	44,721	93.9	7,524	164.6	52,245	100.1	772	92.9	45,493	93.9	931
2011	48,249	101.7	43,915	98.2	9,965	132.4	53,880	103.1	686	88.9	44,601	98.0	896
2012	46,862	97.1	43,209	98.4	8,883	89.1	52,092	96.7	730	106.4	43,939	98.5	879
2013	47,291	100.9	44,376	102.7	9,049	101.9	53,425	102.6	798	109.3	45,174	102.8	900

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





# Cement Production

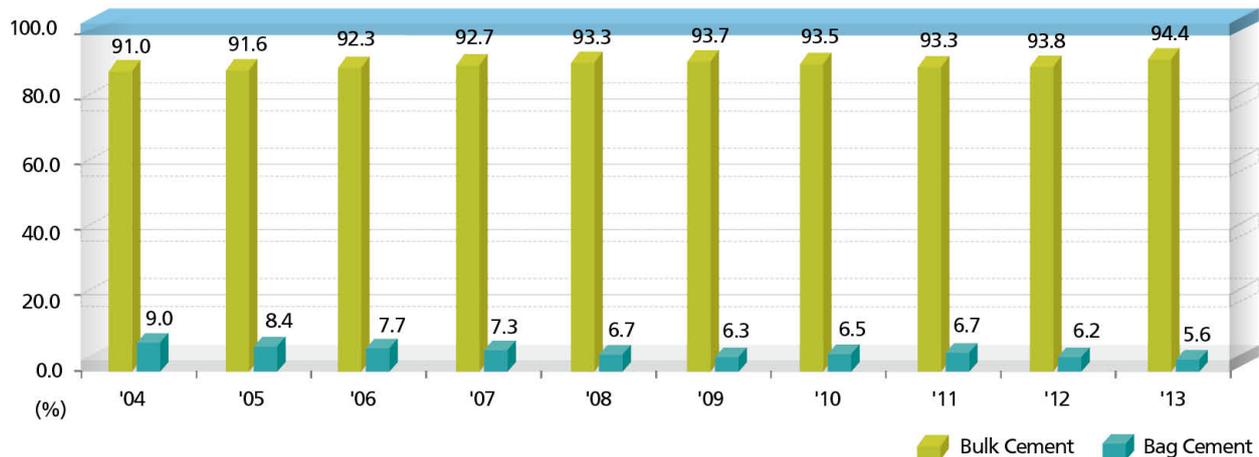
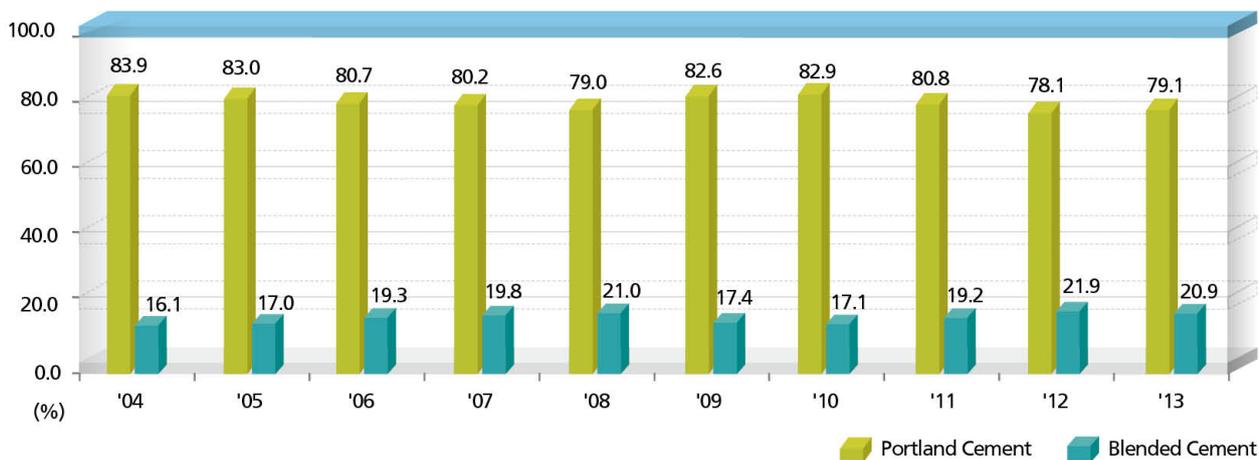
## Classified by Type of Cement

(Unit:1,000t)

Type	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	
Portland Cement	Ordinary	43,772	36,952	37,597	39,564	39,666	40,225	38,376	37,668	35,597	36,342
	Other	1,822	2,199	2,129	2,292	1,159	1,161	945	1,309	1,006	1,049
	Total	45,594	39,151	39,726	41,856	40,825	41,386	39,321	38,977	36,603	37,391
Blended Cement	Blast Furnace Slag	8,736	8,046	9,473	10,326	10,828	8,740	8,099	9,272	10,259	9,900
<b>Total</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>	<b>46,862</b>	<b>47,291</b>

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

## Proportion by Type of Cement





# Cement Sales

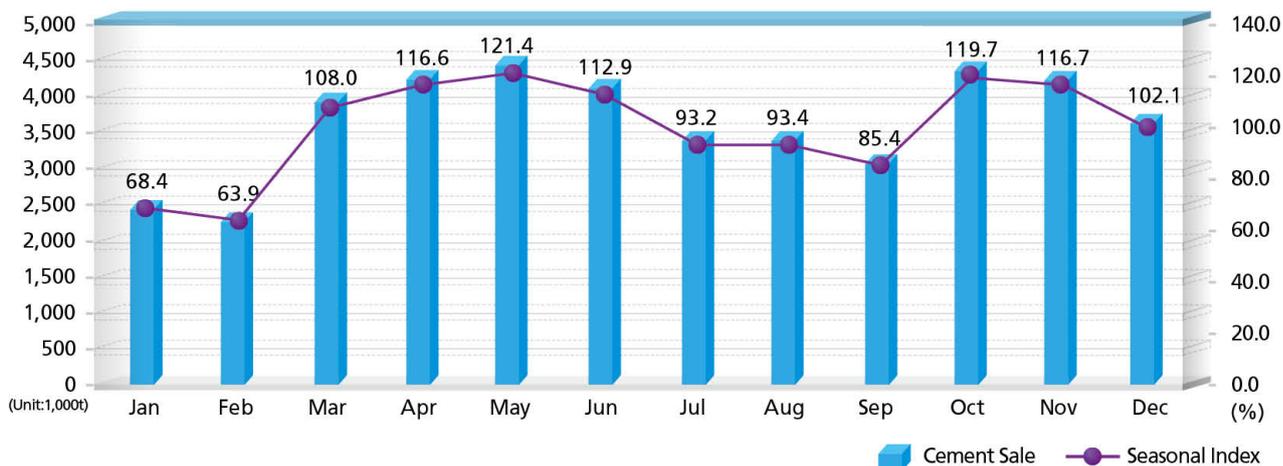
## Sale of the Companies

(Unit:1,000t)

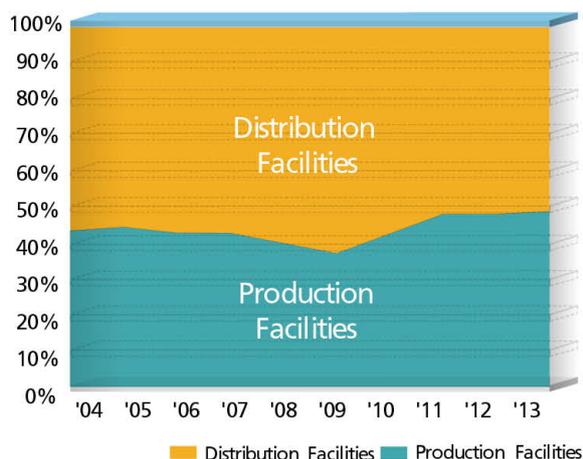
Year	Tongyang	Ssangyong	Hanil	Hyundai	Asia	Sungshin	Lafarge Halla	Hankook	Other	Total
2004	8,949	13,848	5,634	5,546	3,347	7,371	5,925	2,147	6,236	59,003
2005	7,987	12,906	4,424	4,714	2,789	6,047	6,234	1,605	5,549	52,255
2006	8,631	13,632	4,684	4,726	2,811	6,220	7,077	1,490	5,312	54,583
2007	8,897	13,923	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
2013	8,910	13,671	5,986	4,526	3,107	6,003	6,578	1,560	3,881	54,222

Exported Clinker and Cement included.

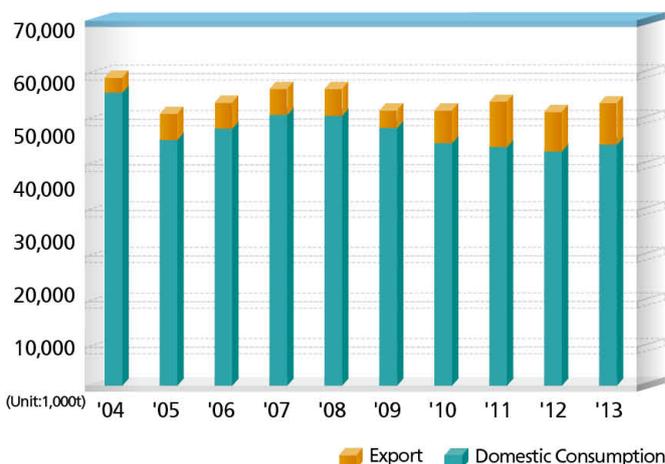
## Seasonal Index for Cement Sales of 2013



## Sale by Type of Facilities



## Sale by Type of Demand



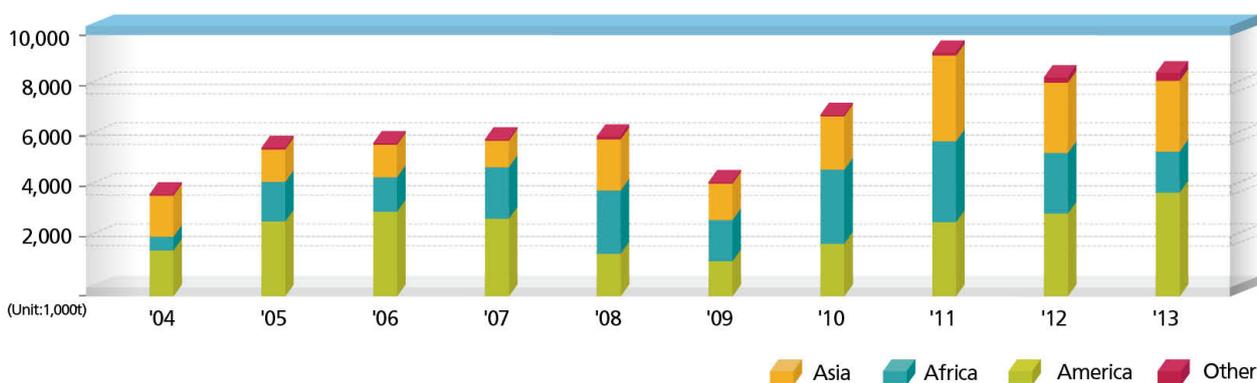


# Export & Import

## Export

Continent	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Asia	1,569	1,259	1,301	1,062	2,079	1,401	2,305	3,454	2,824	2,828
Africa	579	1,522	1,336	2,033	2,575	1,665	2,983	3,224	2,383	1,702
America	1,899	3,136	3,497	3,183	1,692	1,445	2,077	3,045	3,411	4,209
Other	14	53	63	64	154	61	159	242	265	310
<b>Total</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>	<b>8,883</b>	<b>9,049</b>

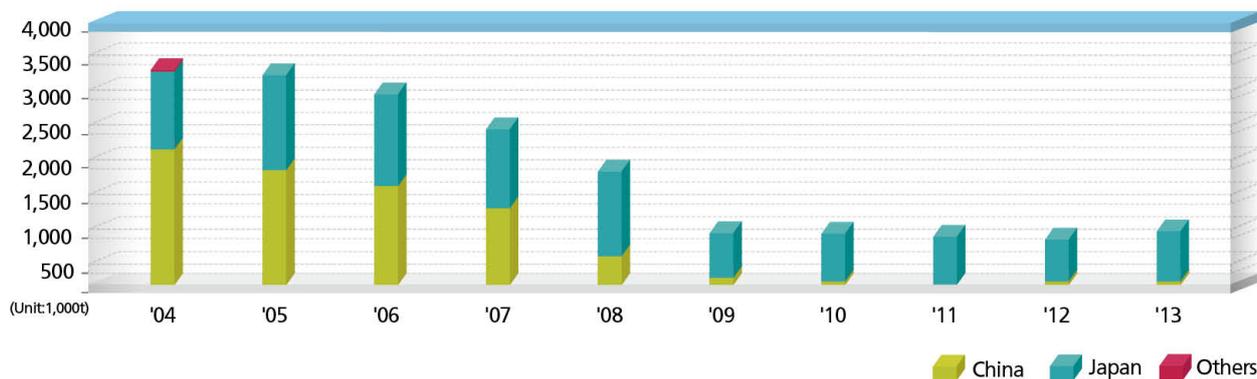
Export include clinker.



## Import

Country	Year	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Asia	China	2,207	1,905	1,659	1,271	522	120	80		11	101
	Japan	1,208	1,498	1,539	1,646	1,463	711	692	684	719	697
Other		5									
<b>Total</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>684</b>	<b>730</b>	<b>798</b>

Import include clinker.



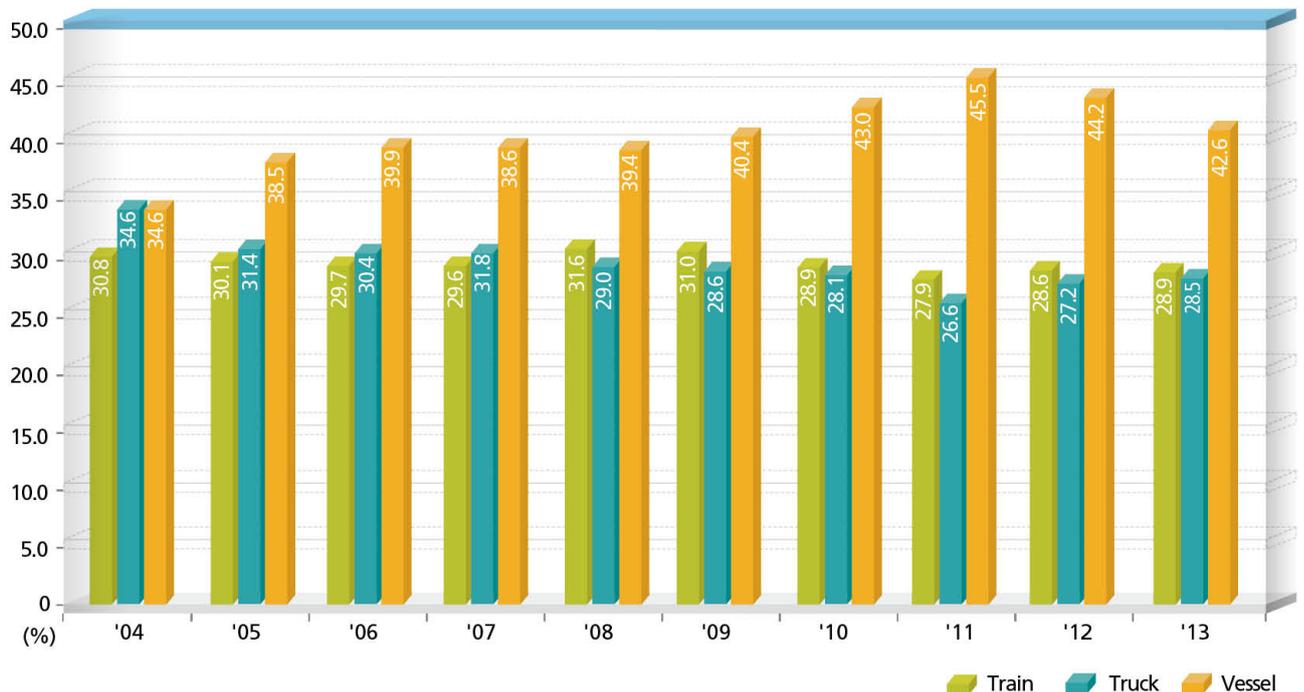
# Transportation

## ■ Proportion by Type of Transportation

(Unit:1,000t)

Year	Train		Truck		Vessel		Total
		%		%		%	
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
2013	14,754	28.9	14,534	28.5	21,726	42.6	51,014

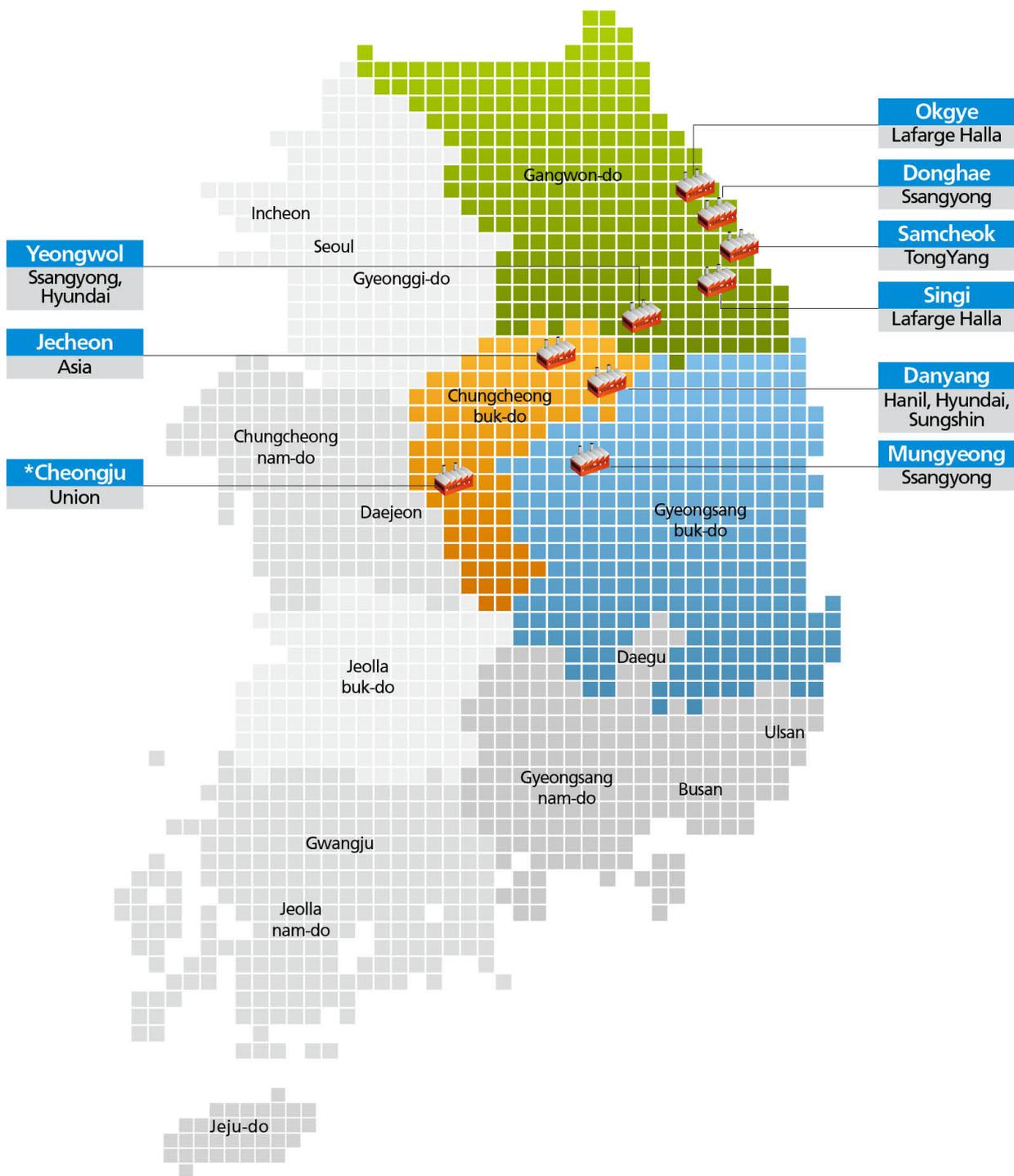
On the primary stage & Export included.





# Location of Kiln Plants

## Kiln Plants



\* Kiln for white cement





## 10 Leading Countries (2011)

(Unit:1,000t)

Ranking	Cement Production		Cement Consumption		Ranking	Export	
1	China	2,063,166	China	2,055,224	1	Turkey	13,483
2	India	270,000	India	229,464	2	Thailand	12,156
3	U.S.A	67,895	U.S.A	72,000	3	China	10,610
4	Iran	66,000	Brazil	64,972	4	Korea	9,965
5	Brazil	64,093	Russian Federation	57,564	5	Japan	9,787
6	Turkey	63,405	Iran	56,000	6	Pakistan	9,107
7	Vietnam	58,994	Turkey	52,251	7	Iran	8,663
8	Japan	56,400	Egypt	50,000	8	Germany	7,848
9	Russian Federation	56,200	Vietnam	50,000	9	Taiwan	7,700
10	Korea	48,249	Indonesia	48,000	10	India	3,999
	<b>Total</b>	<b>2,814,402</b>	<b>Total</b>	<b>2,735,475</b>		<b>Total</b>	<b>93,317</b>

Source : European Cement Association(CEMBUREAU)

## By Regional Groups(2011)

(Unit:1,000t)

Continent	Production	Import	Export	Consumption
<b>EUROPE</b>	<b>274,125</b>	<b>26,282</b>	<b>48,135</b>	<b>258,195</b>
Cembureau	265,272	23,805	45,185	249,866
Non Cembureau	8,853	2,477	2,950	8,329
<b>CIS</b>	<b>92,196</b>	<b>7,788</b>	<b>2,718</b>	<b>97,009</b>
<b>OCEANIA</b>	<b>10,058</b>	<b>6,862</b>	<b>183</b>	<b>16,741</b>
<b>ASIA</b>	<b>2,849,551</b>	<b>49,037</b>	<b>83,417</b>	<b>2,795,750</b>
East Asia	2,209,356	8,786	38,569	2,180,621
South East Asia	146,369	10,844	17,328	152,142
South West Asia	310,276	11,391	13,353	278,284
West Asia	183,550	18,017	14,167	184,703
<b>AFRICA</b>	<b>144,586</b>	<b>34,053</b>	<b>8,120</b>	<b>181,852</b>
East Africa	12,536	3,879	3,120	17,333
North Africa	92,762	10,931	1,896	108,003
Southern Africa	14,074	1,382	1,088	15,000
West Africa	25,215	17,861	2,015	41,516
<b>AMERICA</b>	<b>247,637</b>	<b>18,468</b>	<b>10,412</b>	<b>252,812</b>
North America	79,896	8,066	5,440	80,793
Central America	42,107	1,553	1,970	44,382
West Indies	8,500	1,162	1,938	8,303
East Coast South America	84,842	4,382	725	86,875
West Coast South America	32,292	3,305	339	32,459
<b>Total World</b>	<b>3,618,154</b>	<b>142,490</b>	<b>152,984</b>	<b>3,602,359</b>

Source : European Cement Association(CEMBUREAU)

## Member of the Companies

## TONGYANG CEMENT CORPORATION



Head Office	20, Dongyang-gil, Samcheok-si, Gangwon-do 245-713
CEO	Choi, Jong-Goo
Establishment	June 15, 1957
Assets	1,223(billion won)
No. of Employees	802
Clinker Capacity	10,045 (1,000ton)
Kiln plants(mill plants)	1(3)
Contact Information	Tel 82-33-571-7000 Fax 82-33-572-5541 <a href="http://www.tycement.com">http://www.tycement.com</a>

## SSANGYONG CEMENT CO., LTD.



Head Office	100, Eulji-ro, Jung-gu, Seoul 100-192
CEO	Lee, Yoon-Ho
Establishment	May 14, 1962
Assets	2,470(billion won)
No. of Employees	993
Clinker Capacity	15,326 (1,000ton)
Kiln plants(mill plants)	3(5)
Contact Information	Tel 82-2-2270-5114 Fax 82-2-2270-5577 <a href="http://www.ssysc.co.kr">http://www.ssysc.co.kr</a>

## HANIL CEMENT CO., LTD.



Head Office	Udeok Bldg., 330, Gangnam-daero, Gangnam-gu, Seoul 135-750
CEO	Won, In-Sang
Establishment	December 28, 1961
Assets	1,949(billion won)
No. of Employees	623
Clinker Capacity	7,131(1,000ton)
Kiln plants(mill plants)	1(3)
Contact Information	Tel 82-2-531-7000 Fax 82-2-531-7115 <a href="http://www.hanil.com">http://www.hanil.com</a>

## HYUNDAI CEMENT CO., LTD.



Head Office	398, Seocho-daero, Seocho-gu, Seoul 137-857
CEO	Lee, Joo-Whan
Establishment	September 15, 1963
Assets	479(billion won)
No. of Employees	365
Clinker Capacity	6,864 (1,000ton)
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>

## ASIA CEMENT CO., LTD.



Head Office	ASEA Tower Bldg., 430, Nonhyeon-ro, Gangnam-gu, Seoul 135-719
CEO	Lee, Hoon-Beom
Establishment	April 26, 1957
Assets	745(billion won)
No. of Employees	465
Clinker Capacity	4,146(1,000ton)
Kiln plants(mill plants)	1(2)
Contact Information	Tel 82-2-527-6500 Fax 82-2-527-6699 <a href="http://www.asiacement.co.kr">http://www.asiacement.co.kr</a>

# Member of the Companies

## SUNGSHIN CEMENT CO., LTD.



Head Office  
CEO  
Establishment  
Assets  
No. of Employees  
Clinker Capacity  
Kiln plants(mill plants)  
Contact Information

Taehwa Bldg., 29, Insadong 5-gil, Jongno-gu, Seoul 110-778

Kim, Young-Chan

March, 16 1967

1,138(billion won)

690

9,686(1,000ton)

1(2)

Tel 82-2-3782-7000 Fax 82-3782-7049 <http://www.sunshincement.co.kr>

## LAFARGE HALLA CEMENT CORPORATION



Head Office  
CEO  
Establishment  
Assets  
No. of Employees  
Clinker Capacity  
Kiln plants(mill plants)  
Contact Information

225, San-gye-ri, Okgye-myeon, Gangneung-si, Gangwon-do 210-834

Michel Puchercos

December 27, 1998

586(billion won)

516

8,184 (1,000ton)

2(3)

Tel 82-33-534-1000 Fax 82-33-534-0716 <http://www.lafargehalla.com>

## HANKOOK CEMENT & TEXTILE CO., LTD



Head Office  
CEO  
Establishment  
Assets  
No. of Employees  
Clinker Capacity  
Kiln plants(mill plants)  
Contact Information

239, Mudeung-ro, Buk-gu, Gwangju 500-724 Won, In-Sang

Kim, Hoon-Seok

February 18, 1976

150(billion won)

206

NIX(1,000ton)

(1)

Tel 82-62-519-1600 Fax 82-62-527-1734 <http://www.hcnt.co.kr>

## UNION CORPORATION



Head Office  
CEO  
Establishment  
Assets  
No. of Employees  
Clinker Capacity  
Kiln plants(mill plants)  
Contact Information

OCI Company Ltd., 94, Sogong-ro, Jung-gu 100-718

Kang, Byeong-Ho

December 6, 1952

276(billion won)

237

145(1,000ton)

1(1)

Tel 82-2-757-3801 Fax 82-2-757-3807 ~ 8 <http://www.union21.co.kr>

\* Clinker for White Cement

# Introduction to the Korea Cement Association

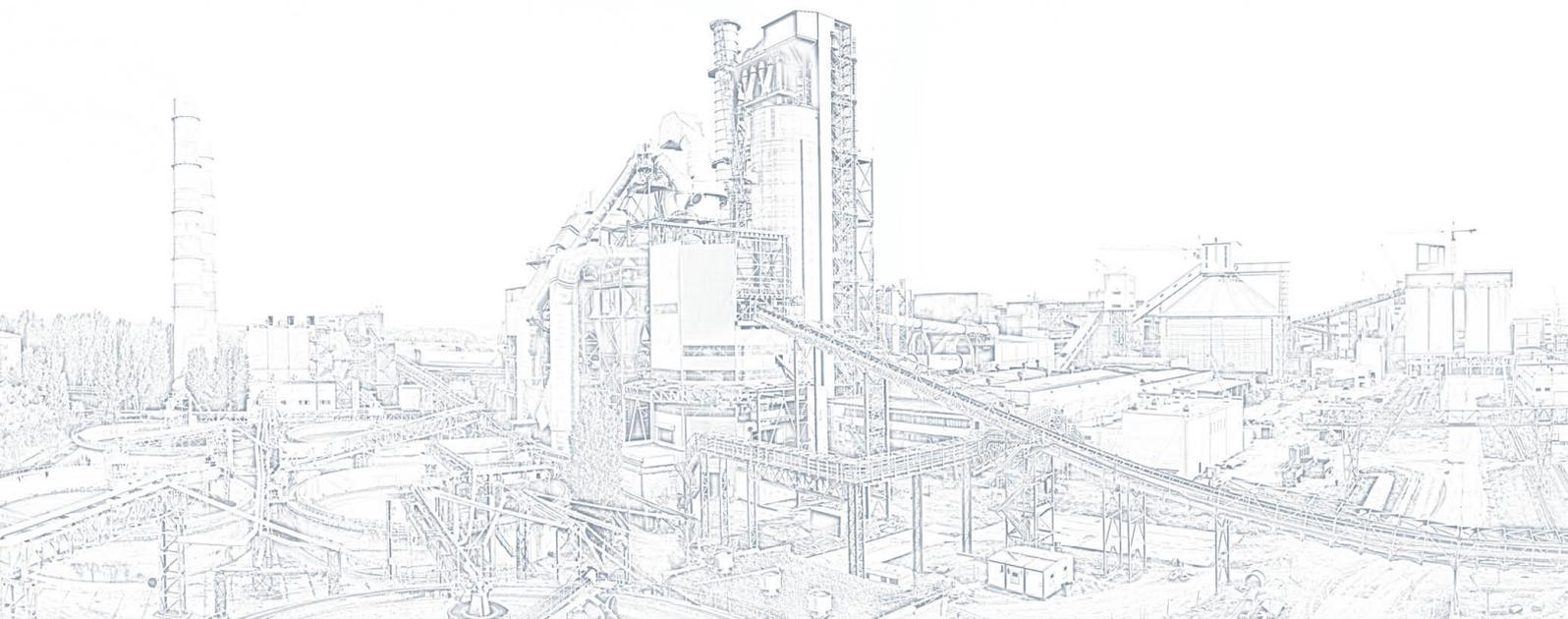
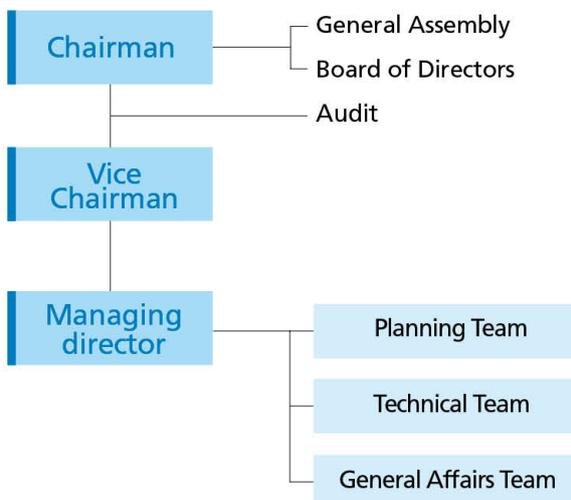
## History

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

16<sup>th</sup> Fl. Samil Plaza, 14, Dogok-ro 1-gil, Gangnam-gu, Seoul, Korea 135-768  
Tel : 82-2-538-1723 Fax : 82-2-538-1720 <http://www.cement.or.kr>