

# China Cement Industry Report, 2007

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## Abstracts

The cement industry is a periodicity industry. China cement industry started to recover in 2006 after suffering the difficulty in 2005, and then the new turn of cement demand had come. China cement output reached 1.35 billion tons in 2007, up 13.5% year-on-year; and the sales was RMB410.4 billion, rising 23.1% year-on-year, the total profit was RMB24 billion, increasing more than 60% year-on-year.

China cement output reached more than 500 million tons in the first half of 2008; the figure will break 1.4 billion tons for the whole year considering the strong demand from post-earthquake reconstruction.

China cement still faces many challenges, like unreasonable structure, over-number small companies, and backward production capacity. In 2006, China central government issued a series of policies to accelerate the adjustment in cement industry and eliminate backward production capacity. The National Development and Reform Commission confirmed that manufactures with backward output capacity should be entirely eliminated during 2007 to 2010, but the following 12 manufacturers will be strong supported.

To improve the concentration degree is the primary objective for the structure adjustment of China cement industry considering the current concentration degree is only 20%. China cement industry will continually accelerate its structure adjustment in 2009, mergers and share participations will become the hot topics. In addition, the players will enhance the waste heat generation projects, as well as new production line construction. Moreover, the cement industry is lack of capital wholly; IPO and refinancing will be the main ways to solve the capital bottleneck.

With the recovery of China cement industry, along with the challenges in China cement industry, foreign investors have started to pay attention to China cement market, more

and more are progressing the activities of merger and acquisitions.

## Contents

### **1 POLICIES OF CHINA CEMENT INDUSTRY**

- 1.1 Policies and Regulations
- 1.2 Energy Consumption and Discharge Standard

### **2 OPERATIONS**

- 2.1 Operation of International Cement Industry
- 2.2 Operation of China Cement Industry
  - 2.2.1 Operations from 2007 to H1 2008
  - 2.2.2 Development Trend
- 2.3 Investment Analysis, 2007-2008
  - 2.3.1 Investment Status
  - 2.3.2 Investment Trend

### **3 SHARE PARTICIPATION AND MERGER ACTIVITIES OF CHINA CEMENT INDUSTRY**

- 3.1 Overview
- 3.2 Activities in 2007
- 3.3 Trend
  - 3.3.1 Manufacturers with Government Support, 2007-2010
  - 3.3.2 Manufacturers to be Eliminated, 2007-2010
- 3.4 Regional Developments
  - 3.4.1 North
  - 3.4.2 Southeast
  - 3.4.3 Southwest

### **4 CASE STUDY OF SHARE PARTICIPATIONS AND MERGERS**

- 4.1 Lafarge & Shui On Mergers Sichuan Shuangma
  - 4.1.1 Profile of Lafarge & Shui On
  - 4.1.2 Process Analysis
  - 4.1.3 Strategy Analysis
- 4.2 CRH Invests Yatai Group
  - 4.2.1 Profile of CRH

- 4.2.2 Process Analysis
- 4.2.3 Strategy Analysis
- 4.3 Heidelberg Invests Jidong Cement
- 4.4 Morgan Stanley Invests Shanshui Group
- 4.5 Morgan Stanley & IFC Invests Conch Cement
- 4.6 Holcim Investes Huaxin Cement

## **5 ANALYSIS OF CHINA STOCK LISTED CEMENT COMPANIES**

- 5.1 Anhui Conch Cement Co., Ltd
  - 5.1.1 Operations
  - 5.1.2 M&A activities
- 5.2 Tangshan Jidong Cement Co., Ltd
- 5.3 Datong Cement Co., Ltd
- 5.4 Xinjiang Tianshan Cement Co., Ltd
- 5.5 Sichuan Shuangma Cement Co., Ltd
- 5.6 Henan Tongli Cement Co., Ltd
- 5.7 Inner Mongolia Xishui Chuangye Co., Ltd
- 5.8 Anhui Chaodong Cement Co., Ltd
- 5.9 Jiangxi Wannianqing Cement Co., Ltd
- 5.10 Ningxia Saima Industry Co., Ltd
- 5.11 Taiyuan Lionhead Cement Co., Ltd
- 5.12 Shaanxi Qinling Cement Co., Ltd
- 5.13 Sichuan Golden Summit (Group) CO., Ltd
- 5.14 Huaxin Cement Co., Ltd
- 5.15 Fujian Cement Co., Ltd
- 5.16 Hebei Taihang Cement Co., Ltd
- 5.17 Jilin Yatai Group Co., Ltd
- 5.18 Guangdong Tapai Group Co., Ltd
- 5.19 Gansu Qilianshan Cement Co., Ltd

## **6 CONCLUSIONS AND SUGGESTIONS**

## Selected Charts

### SELECTED CHARTS

Policies of China Cement Industry and Relevant Industries, 2006-2008  
Energy Consumption Standards of China Cement Industry , 2008  
Discharge Standard of China Cement Industry, Jul. 1, 2006-Dec. 31, 2009  
Output and Growth of Global Cement Industry, 2007-2008  
Output Growth of Key Global Cement Manufacturing Countries and Regions, 2001-2007  
Accumulative Cement Production Capacity Per Capita in China, 2001-2007  
Cement Output and Y-o-Y Growth in China, 2001-2007  
Regional Cement Output in China, 2001-2007  
Top Ten Provinces According to Cement Output in China, 2007  
Cement Production Capacity and Apparent Consumption Growth, 2007-2008  
Cement Supply and Demand Model in China  
Sales Revenue and Total Profit of China Cement Industry, 2000-2007  
China Cement Demand Forecast, 2008-2010  
Fixed Assets Investment and Y-o-Y Growth of China Cement Industry, 2002-2007  
The Relationship between China GDP Growth and Cement Consumption  
The Relationship between China Fixed Assets Investment Growth and Cement Consumption  
Forecast of China Fixed Assets Investment, 2006-2010  
Forecast of China Fixed Assets Investment over Cement Industry, 2008-2010  
Manufacturer Number and Concentration Degree of Global Key Cement Production Countries, 2007  
Output and Concentration Degree of Top Ten Cement Manufacturers in China, 2000-2008  
Share Participation and Merger Cases of China Cement Industry, 2007  
National Cement Manufacturers with Chinese Government Support during the 11th Five-year Period  
Regional Cement Manufacturers with Chinese Government Support during the 11th Five-year Period  
Number of Manufacturers has been Eliminated in 2007  
Reform Forecast of Cement Industry in North China, 2010  
Reform Forecast of Cement Industry in Southeast China, 2010  
Reform Forecast of Cement Industry in Southwest China, 2010  
Profile of Lafarge & Shui On  
Share Participation and Merger Activities of Conch Group, 2007-2008  
Operations of Tangshan Jidong Cement Co., Ltd, 2005-2008

Share Participation and Merger Activities of Tangshan Jidong Cement Co., Ltd,  
2007-2008

Sales Revenue of Xinjiang Tianshan Cement Co., Ltd, 2005-2008

Share Participation and Merger Activities of Xinjiang Tianshan Cement Co., Ltd,  
2007-2008

New Project Investment Ratios of 19 China Stock Listed Cement Companies,  
2000-2008

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