

China Cement Industry Report, 2007



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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.

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