

Indonesia Cement Industry Research Report 2024-2033

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Abstracts

Indonesia is the largest economy in Southeast Asia with a population of about 280 million at the end of 2023. According to CRI, Indonesia is also the largest producer and consumer of cement in Southeast Asia.

Indonesia has emerged as the sixth-largest cement producer globally, with an estimated production of 66 million metric tons in 2023. Despite the challenges posed by the pandemic, its impact on the country's cement industry has been relatively moderate. Infrastructure and residential-commercial projects have played a crucial role in sustaining domestic demand during this period.

However, cement consumption remains low in Indonesia, with per capita annual production at no more than 300 kilograms, significantly lower than that of its peers like Malaysia (over 600 kilograms per capita) or Vietnam. According to CRI, this suggests that infrastructure development is still lacking in Southeast Asia's largest economy. The insufficient quality and quantity of infrastructure hinder connectivity, raise logistics costs, reduce business competitiveness, and contribute to social issues, such as limited access to healthcare in rural regions.

The ongoing development of Indonesia's new capital city, IKN, particularly in Sumatra and Eastern Indonesia, has stimulated demand for cement. Leading companies like Semen Indonesia have shifted their focus to the domestic market, capitalizing on improved coal supplies availability in the first half of 2022.

Looking ahead, the cement sector expects significant growth driven by demand from developers undertaking numerous new construction projects, including the construction of a new capital in Borneo Island's jungles. Moreover, Indonesia's ambitious plans for sustained economic growth, with numerous seaports and harbor projects in the pipeline, alongside increasing urbanization, indicate Indonesia will remain a construction hub for years.

However, concerns loom over the industry, including rising production costs, particularly

energy-related issues, and worries about the environmental impact of cement production, with instances of local unrest around provincial plants. Furthermore, Indonesia is still grappling with overcapacity in the cement sector, with a utilization level of 54% in 2022 and no expected increase beyond 57% by 2025.

In conclusion, Indonesia's cement industry is expected to have a moderate expansion despite encountering challenges such as fluctuating energy prices, environmental concerns and overcapacity. CRI projects that the production volume of Indonesia's cement industry will rise from 67.32 million metric tons in 2024 to approximately 86.31 million metric tons by 2033, exhibiting a compound annual growth rate (CAGR) of 2.8%.

Topics covered:

Indonesia Cement Industry Overview

Economic environment and policy environment of cements in Indonesia

Indonesian cement market size from 2019 to 2023

Analysis of major Indonesian cement manufacturers

Key Drivers and Market Opportunities of Indonesia's Cement Industry

What are the key drivers, challenges and opportunities for the Indonesian cement industry during the forecast period 2024-2033?

What is the expected revenue of the Indonesia Cement market during the forecast period 2024-2033?

What strategies are adopted by the key players in the market to increase their market share in the industry?

Which segment of the Indonesian Cement Market is expected to dominate the market in 2033?

Indonesia Cement Market Forecast from 2024 to 2033

What are the main headwinds facing Indonesia's cement industry?

Contents

1 OVERVIEW OF INDONESIA

- 1.1 Geographical conditions
- 1.2 Indonesia's demographic structure
- 1.3 Indonesia's economy
- 1.4 Indonesian minimum wage from 2014 to 2024
- 1.5 Impact of COVID -19 on Indonesia's Cement Industry

2. DEVELOPMENT ENVIRONMENT OF INDONESIA CEMENT INDUSTRY

- 2.1 Economic Environment
 - 2.1.1 Indonesia's GDP
 - 2.1.2 Minimum Wage in Indonesia, 2014-2023
- 2.2 FDI in Indonesia Cement Industry
- 2.3 Policy Environment of Indonesia Cement Industry
 - 2.3.1 Preferential Policies on Foreign Investment of Cement Industry in Indonesia
 - 2.3.2 Policies Related to Imports and Exports of Cement Industry in Indonesia

3. ANALYSIS ON MARKET STATUS OF INDONESIA CEMENT INDUSTRY

- 3.1 Supply of Indonesia Cement Industry
 - 3.1.1 Production Volume of Indonesia Cement Industry
 - 3.1.2 Production volume of Indonesia Cement products by types
- 3.2 Demand of Indonesia Cement Industry
 - 3.2.1 Domestic Sales Volume of Cement
 - 3.2.2 Market size of Cement
 - 3.2.3 Demand structure and key clients of cement industry in Indonesia

4. ANALYSIS ON IMPORT AND EXPORT OF CEMENT IN INDONESIA

- 4.1 Indonesia Cement Industry Import Situation
 - 4.1.1 Import Volume and Import Value of Indonesia Cement Industry
 - 4.1.2 Main Import Sources of Indonesia Cement
- 4.2 Indonesia Cement Industry Export Situation
 - 4.2.1 Export Volume and Export Value of Indonesia Cement Industry
 - 4.2.2 Main Export Destinations of Indonesia Cement

5. COST AND PRICE ANALYSIS OF THE INDONESIA CEMENT INDUSTRY

5.1 Cost

5.1.1 Raw Material Cost

5.1.2 Energy Cost

5.1.3 Human Resources Cost

5.2 Price trend of cement in Indonesia 2020-2024

6. MARKET COMPETITION ANALYSIS OF INDONESIA'S CEMENT INDUSTRY

6.1 Barriers to entry in Indonesia's cement industry

6.1.1 Brand barriers

6.1.2 Quality barriers

6.1.3 Capital barriers

6.2 Competitive Structure of Indonesia's Cement Industry

6.2.1 Bargaining power of cement suppliers

6.2.2 Consumer bargaining power

6.2.3 Competition in Indonesia's Cement Industry

6.2.4 Potential Entrants to the Cement Industry

6.2.5 Alternatives to chemical cements

7. TOP 5 CEMENT MANUFACTURERS IN INDONESIA

7.1 Semen Indonesia

7.1.1 Corporate Profile of Semen Indonesia

7.1.2 Operations of Semen Indonesia in Indonesia

7.2 Indocement Tungal Prakarsa

7.2.1 Corporate Profile of Indocement Tungal Prakarsa

7.2.2 Operations of Indocement Tungal Prakarsa in Indonesia

7.3 Holcim Indonesia

7.3.1 Corporate Profile of Holcim Indonesia

7.3.2 Operations of Holcim Indonesia in Indonesia

7.4 Holcim-Aspasco

7.4.1 Corporate Profile of Holcim-Aspasco

7.4.2 Operations of Holcim-Aspasco in Indonesia

7.5 Anhui Conch

7.5.1 Corporate Profile of Anhui Conch

7.5.2 Operations of Anhui Conch in Indonesia

8. INDONESIA CEMENT INDUSTRY OUTLOOK, 2024-2033

8.1 Analysis of Factors Influencing the Development of the Indonesia Cement Industry

8.1.1 Drivers and Development Opportunities

8.1.2 Threats and Challenges

8.2 Supply Forecast of Indonesia Cement Industry, 2024-2033

8.3 Demand Forecast of Indonesia Cement Industry, 2024-2033

8.4 Import and Export Forecast of Indonesia Cement Industry, 2024-2033

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List Of Charts

LIST OF CHARTS

- Chart Indonesia's total population from 2013 to 2023
- Chart Indonesia's GDP per capita from 2013 to 2023
- Char Policies related to the fertilizer industry issued by the Indonesian government from 2018 to 2024
- Chart Foreign investment policy in Indonesia's fertilizer industry
- Chart 2014-2024 Indonesian minimum wage
- Chart 2019-2023 Indonesia's total fertilizer production
- Chart 2019-2023 Indonesia's nitrogen, phosphorus and potassium fertilizer production
- Chart 2019-2023 Indonesia's domestic consumption of chemical fertilizers
- Chart 2019-2023 Indonesian fertilizer imports
- Chart 2019-2023 Indonesian fertilizer import amount
- Chart 2019-2023 Indonesia's fertilizer importing countries and import amounts
- Chart 2019-2023 Indonesian fertilizer export volume
- Chart 2019-2023 Indonesian fertilizer export value
- Chart 2019-2023 Indonesia's main export destinations of fertilizers
- Chart 2024-2033 Indonesia's fertilizer production forecast
- Chart 2024-2033 Indonesian domestic fertilizer market size forecast
- Chart 2024-2033 Indonesia's fertilizer import forecast
- Chart 2024-2033 Indonesia's fertilizer export forecast

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