

Vietnam Cement Comprehensive Report Q2.2017

<https://marketpublishers.com/r/VEA7C3F51B8EN.html>

Date: May 2017

Pages: 146

Price: US\$ 1,245.00 (Single User License)

ID: VEA7C3F51B8EN

Abstracts

This report provides a comprehensive analysis of the global and Vietnam cement market including the historical data and forecast figures. The report further reveals market drivers, opportunities, restraints, and challenges to be faced in the Vietnam market.

In 2015, the Vietnam cement industry continued to oversupply with the using rate of 64% of the total production, excluding export value, and this situation seems to keep going on in the near future. However, the cement demand might change significantly due to the rising of infrastructure and real estate projects, but this is not guaranteed.

The quality of cement production depends on two factors: raw material and technology & equipment. Limestone used as raw material to manufacture portland cement have to satisfy the requirements of quality content of MgO and CaO. In terms of technology, manufacturing enterprises use rotary kiln dry method with two major equipment lines derived from the G7 countries and China. G7 machinery will provide higher productivity, however, materials play a more important role in deciding the quality of cement so small firms can consider Chinese equipment, while those from G7 countries are still the best choice for large enterprises.

Logistic is still a weakness of Vietnam cement companies. The linker supply in the North is redundant, while the demand in the South is increasing, which results to the transportation of linker from the North to the South. Difficulties in shipping process cause the transporting cost higher, making the cement price in the South more expensive than in the Middle and in the North. Besides, cement price in Vietnam is predicted to rise due to the climbing of material and energy cost, which may lead to the lower efficiency of the industry.

In the near future, direct sale to projects and industrial customers may become the main

trend of the industry. There are 3 groups of cement supply in Vietnam: companies under VICEM accounting for 27% of total capacity in Vietnam, foreign enterprises and private companies with large scale. The internal competition is very stiff, with the development and dominance of large brands, smaller firms are facing bankruptcy or being merged to as they are not capable to compete with the big.

This report provides a comprehensive review about the global and Vietnam beverage industry based on specific and trustworthy data, particularly regarding:

An overview of the international and domestic industry including the data about supply – demand, market shares, advantages and disadvantages, internal competition, sale strategies of retails as well as development trends of the industry in the future.

Detail information, including current status and potentials of Vietnam market: the production – consumption, import – export, market shares, revenue structure, inventories and major brands in the market.

Some forecasts in the near future and risks analysis when joining the industry.

Risk analysis through SWOT and 5 – forces analyzing.

Details about top enterprises in the market.

Contents

EXECUTIVE SUMMARY

Business Environment

1.1 Macroeconomic Situation

- Figure 1. GDP growth, 2011 - Q1/2017e
- Figure 2. GDP by current price, 2014 - Q1/2017
- Figure 3. Manufacturing index 2012 – Q1/2017e
- Figure 4. VND/USD Exchange rate, 2015 – 4/2017
- Figure 5. State budget Deficit, 2010 - 2016
- Figure 6. FDI, 2014 - Q1/2017
- Figure 7. FDI structure by industry, Q1/2017e

1.2. Legal Barriers

- Table 1. FDI in Vietnam, 2010 – 9M/2016
- Table 2. Environmental Protection Tax rate applied since Jan 1st, 2012
- Table 3. Natural Resources Tax rate applied since Feb 1st, 2014
- Table 4. Import Export Tariff applied since 2014

1.3 Free Trade Agreements

- Figure 8. FDI 2006 – 3M/2017e

Industry Overview

2.1 Global Cement Industry Situation

2.1.1 Consumption

- Figure 9. International cement consumption 2010-2016e
- Figure 10. Structure of cement consumption, 2015

2.1.2 Production

- Figure 11. International cement production 2010-2016e
- Figure 12. Largest cement producers in the world by country, 2016e
- Figure 13. Production by regions, 2015e

2.1.3 Export

- Figure 14. Largest cement exporting country, 2015e

2.1.4 Import

- Figure 15. Global cement import, 2010 – 2016e
- Figure 16. Top 10 highest cement and clinker importers by nation, 2015

2.1.5 Price Movement

- Figure 17. Movement of average cement price in the world, 2000 – 2016e

2.1.6 Production and Consumption Situation in typical countries

2.1.7 Production and Consumption Situation in ASEAN

2.1.8 Key Players in the industry

2.2 Vietnam Cement Industry Situation

2.2.1 History of Vietnam Cement Industry

2.2.2 Definition and Classification

2.2.3 Fundamental Manufacturing Process

2.2.4 Scale and Market Share

Figure 18. Allocation of manufacturing enterprises by region, 2015

Figure 19. Allocation of manufacturing system by region, 2016

Figure 20. Market shares by key players, 3M/2017e

2.2.5 Raw Materials

Figure 21. Demand – supply and energy loss, 2010 – 2016e

Figure 22. Structure of electricity consumption by industry, 2016

Figure 23. Structure of electricity consumption by 4 main industries, 2016

Figure 24. The average electricity price, 1/1/2007 – 31/12/2016

Figure 25. Coal reserves by region

Figure 26. Coal demand and supply forecast, 2015-2030

Table 5. Some fine limestone areas in North and Central

2.2.6 Production Technology

Table 6. Vertical Shaft Kilns vs. Rotary Kilns manufacturing technology in producing 1,000 tons of cement

Table 7. Cost Per Unit of building cement plant

Table 8. Cost Per Unit of typical projects

Table 9. Cost Per Unit of machinery from G7 vs. machinery from China

Table 10. Comparison of level of (Fr.Cao) in clinker heated in G7 and China Kiln

Table 11. Maintenance Costs of equipment from G7 and China

2.2.7 Supply and Demand

Figure 27. Domestic Production - Consumption, 2010 – 2016e

Figure 28. Cement Supply and Demand in the North, 2010 – 3M/2017e

Figure 29. Cement Supply and Demand in the Central, 2010 – 3M/2017e

Figure 30. Cement Supply and Demand in the South, 2010 – 3M/2017e

Table 12. Cement Production, 2010 – 2016e

2.2.8 Cement and Clinker Manufacturing

2.2.9 Consumption

Figure 31. Structure of consumption by region, 2010 – 3M/2017e

Figure 32. Cement consumption by month, 1/2015 – 3M/2017e

Figure 33. Cement consumption growth by region, 2010 – 2016e

2.2.10 Clinker and Cement Export

Figure 34. Top 6 largest cement exporting countries 2016e

Figure 35. Export of cement and clinker, 2010- 3M/2017e

Figure 36. Main export market, 3M/2017

Table 13. Cement manufacturers for export 2016

2.2.11 Inventory

Figure 37. Inventories, 2010-3M/2017e

2.2.12 Price Movement

Figure 38. Cement price, 3/2017

Figure 39. Average cement price, 3/2017

2.2.13 Distribution Channels

2.2.14 Logistic System

Table 14. List of harbors and ports of cement enterprises

2.3 Industry Risks

2.3.1 Major Risks

Table 15. List of delayed and cancelled plants in the Master plan

Figure 40. Structure of implementation progress of constructions, 2010 – 2015

2.3.2 SWOT Analysis

2.3.3 5-Forces Analysis

2.4 Industry Planning

2.4.1 Cement Planning

2.4.2 Construction and Real Estate Industrial planning

2.5 Prospects and Forecasts

2.5.1 Industry Driving Forces

2.5.2 Driving forces for output industry

Figure 41. Forecast on construction and infrastructure

Figure 42. Population growth, 2010-2016

2.5.3 Global Forecast – MOIT

2.5.4 Domestic Forecast

Figure 43. Forecast of Cement industry, 2016f - 2020f

3. ENTERPRISE ANALYSIS

Table 16. Typical enterprises in 2015

3.1. Revenue and profit analysis

Figure 44. Net revenue growth, 2015 – 2016

Figure 45. Gross profit growth, 2015 - 2016

3.2 Operation ratios

Figure 46. Receivables turnover of enterprises 2015 - 2016

Figure 47. Inventory turnover of enterprises 2015 – 2016

Figure 48. Asset utilization rate of enterprises 2015 – 2016

3.3. Financial strength

Figure 49. Repayment capacity ratios of enterprises 2015 – 2016

Figure 50. Solvency Ratios of enterprises 2015 - 2016

3.4 Return on investment

Figure 51. Profitability ratio of enterprises, 2015 - 2016

Appendix

4.1 Update cement projects in the period 2011 - 2030

4.2 List of infrastructure projects period 2010 - 2030

4.3 Financial statements

I would like to order

Product name: Vietnam Cement Comprehensive Report Q2.2017

Product link: <https://marketpublishers.com/r/VEA7C3F51B8EN.html>

Price: US\$ 1,245.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/VEA7C3F51B8EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970