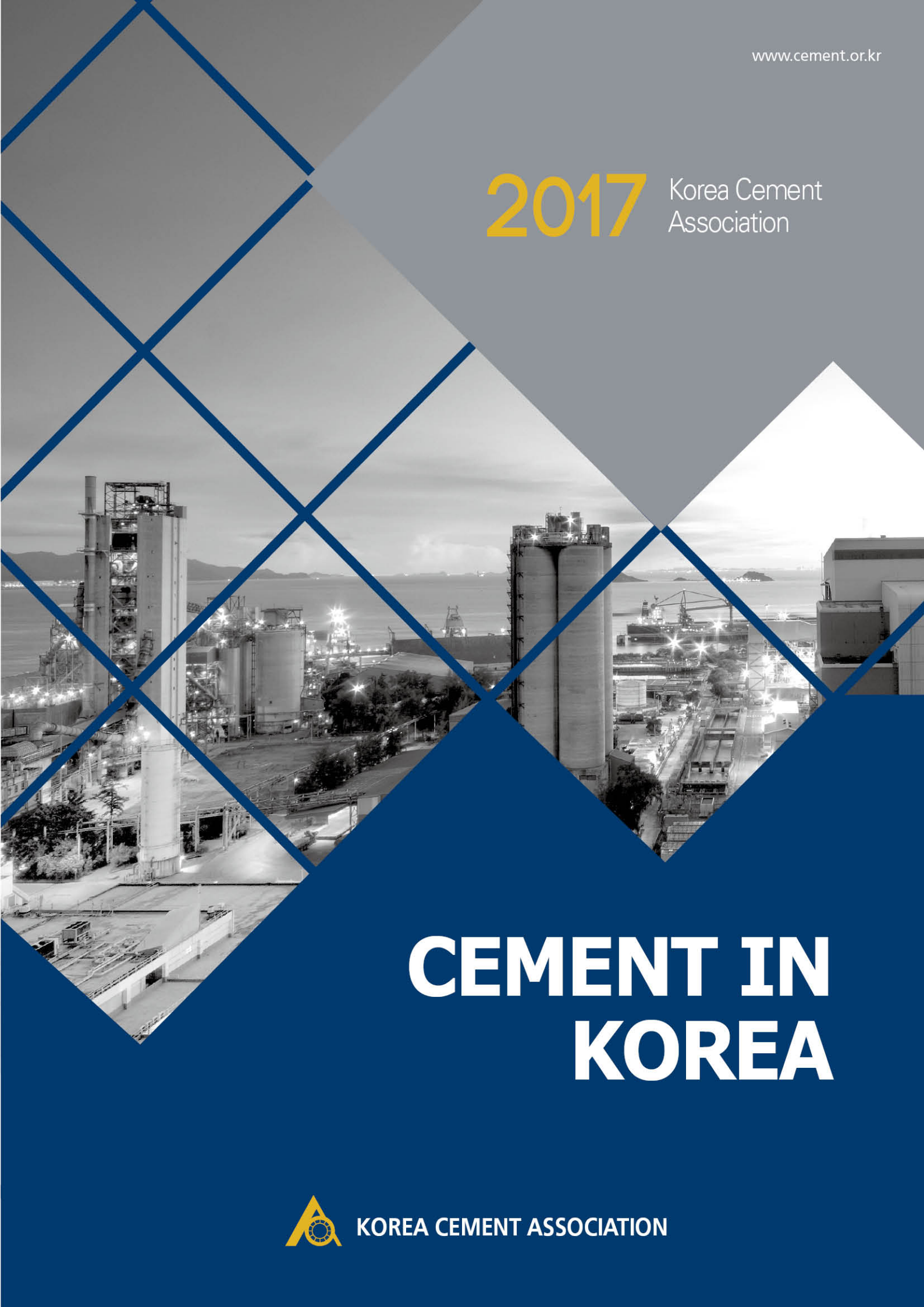


2017 Korea Cement
Association



CEMENT IN KOREA



KOREA CEMENT ASSOCIATION

Outline of Industry



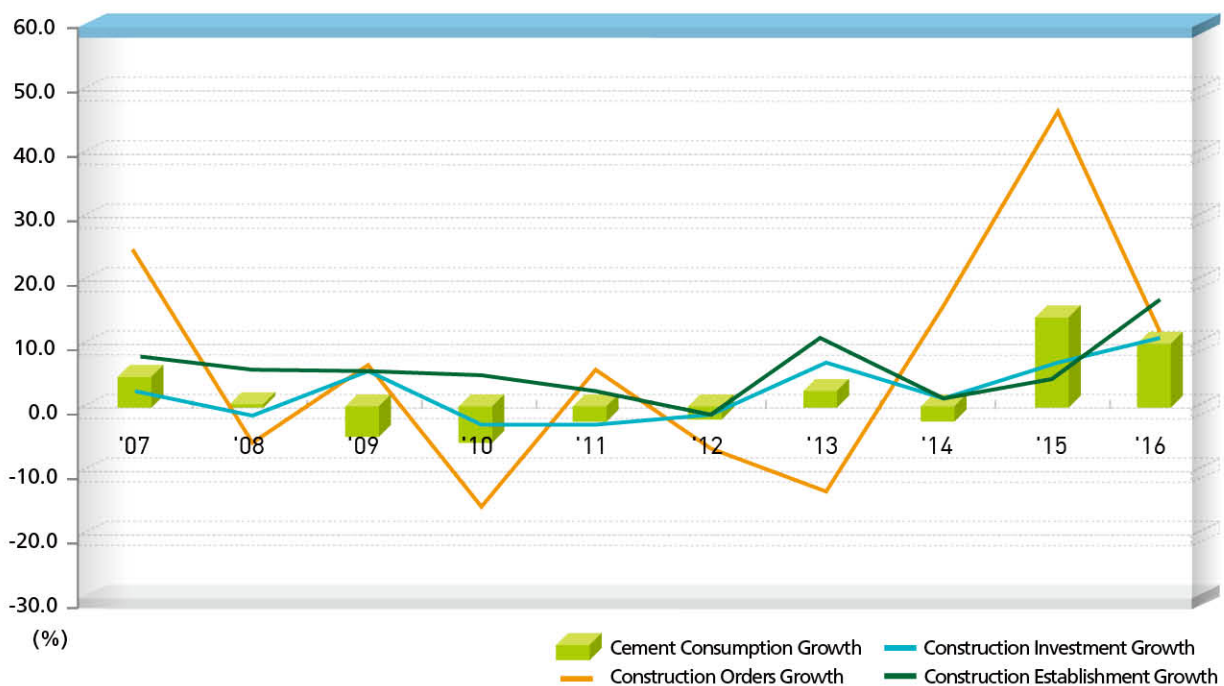
Scale of Cement Industry (2016)

No. of Companies	9
No. of Kiln Plants	12
No. of Grinding Plants	23
No. of Kilns	49
Assets (Billion Won)	9,609
Cement Production (1,000t) * #	56,742
Domestic Consumption (1,000t)* #	55,756
No. OF Employees	4,800
No. of Distribution Terminals(Silos)	81(154)
Terminal Capacity (1,000t)	1,090

* White cement not included.

Non-member Companies are included.

Cement Consumption Growth & Construction Index Growth



Supply & Demand

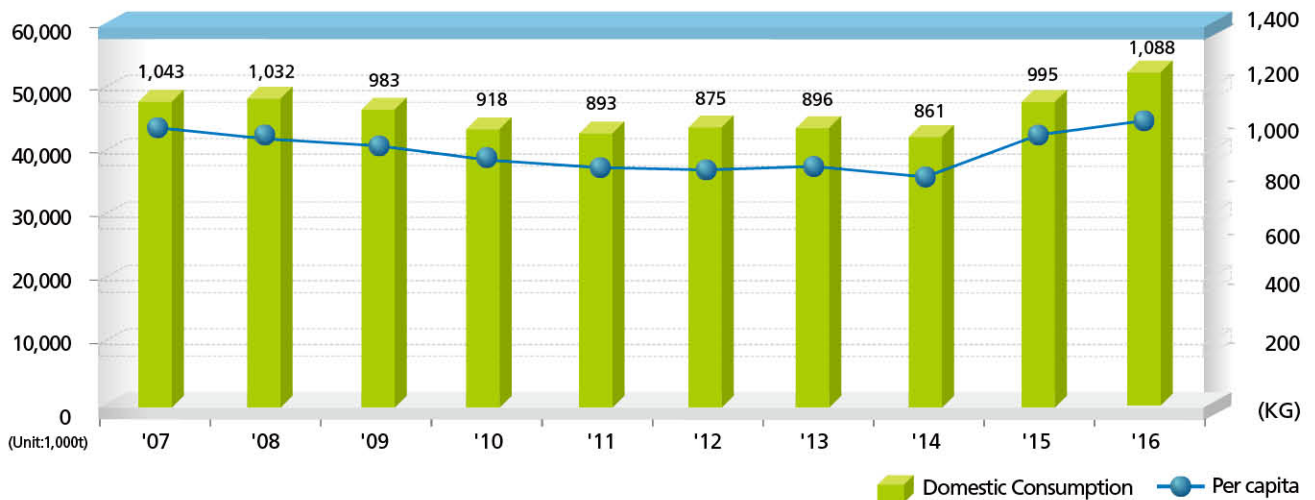
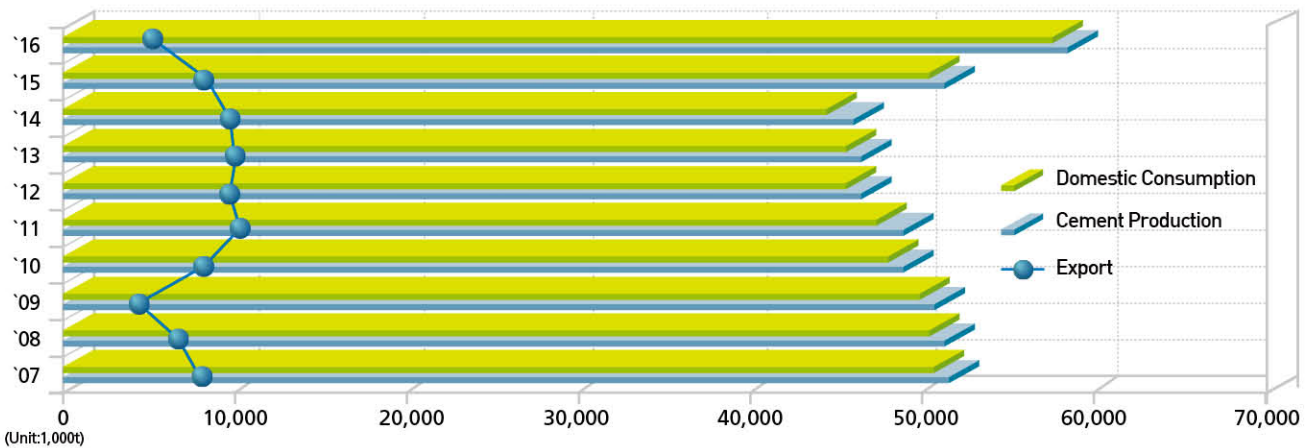


Production & Sales & Consumption

(Unit:1,000t)

Year	Cement Production*		Sales						Import		Domestic Consumption		Per Capita (kg)
		%	Domestic	%	Export	%	Total	%		%		%	
2007	52,182	106.1	47,884	106.0	6,342	102.3	54,225	105.5	2,917	91.2	50,801	105.0	1,043
2008	51,653	99.0	48,651	101.6	6,500	102.5	55,152	101.7	1,985	68.1	50,637	99.7	1,032
2009	50,126	97.0	47,639	97.9	4,572	70.3	52,211	94.7	831	41.9	48,470	95.7	983
2010	47,420	94.6	44,721	93.9	7,524	164.5	52,245	100.1	772	92.9	45,493	93.9	918
2011	48,249	101.7	43,916	98.2	9,965	132.4	53,880	103.1	686	88.8	44,601	98.0	893
2012	46,862	97.1	43,209	98.4	8,883	89.1	52,092	96.7	730	106.5	43,939	98.5	875
2013	47,291	100.9	44,376	102.7	9,049	101.9	53,425	102.6	798	109.3	45,174	102.8	896
2014	47,048	99.5	42,810	96.5	9,525	105.3	52,335	98.0	897	112.4	43,707	96.8	861
2015	52,044	110.6	49,580	115.8	7,348	77.1	56,928	108.8	1,158	129.1	50,737	116.1	995
2016	56,742	109.0	54,542	110.0	5,043	68.6	59,585	104.7	1,213	104.8	55,756	109.9	1,088

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



Cement Production

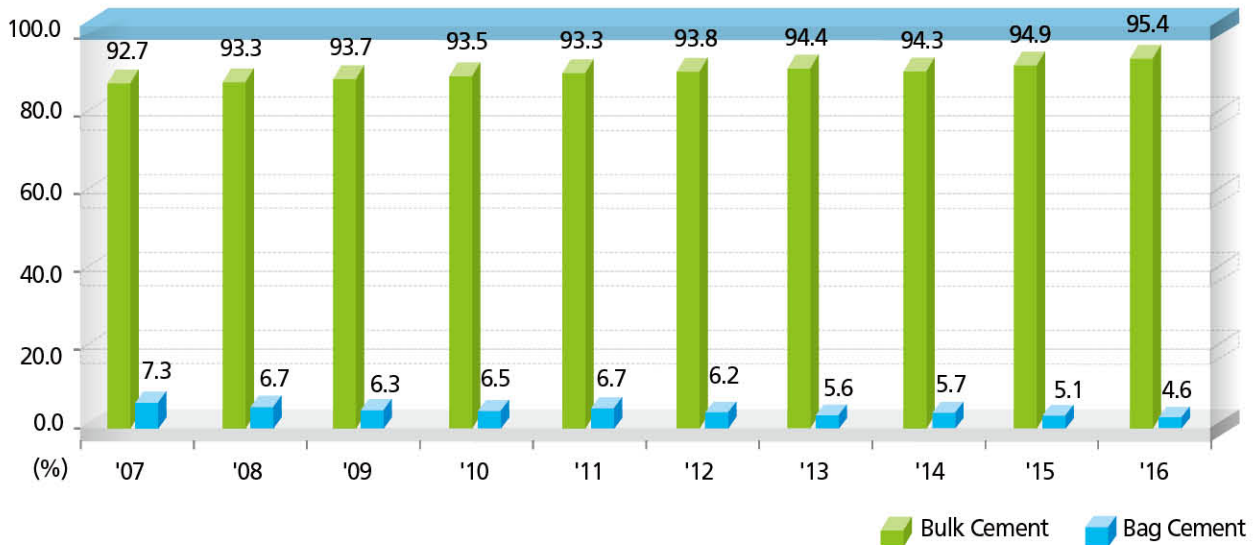
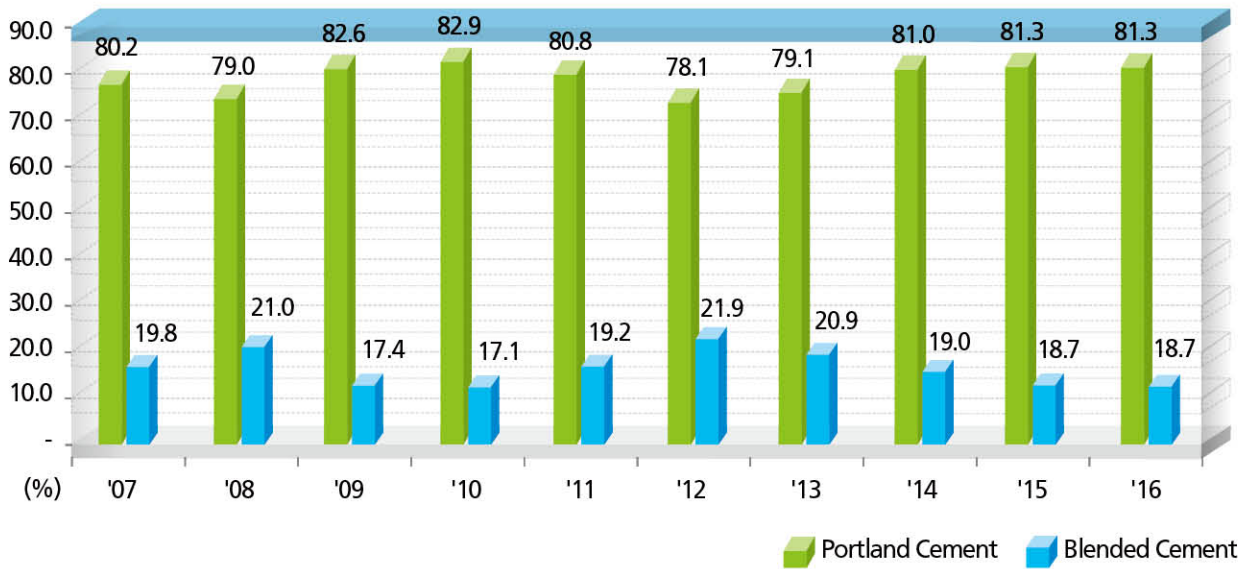


Classified by Type of Cement

(Unit:1,000t)

Type	2007	2008	2009	2010	2011	2012	2013	2016	2015	2016
Portland Cement	41,856	40,825	41,386	39,321	38,977	36,603	37,391	38,129	42,294	46,117
Blended Cement	10,326	10,828	8,740	8,099	9,272	10,259	9,900	8,919	9,750	10,625
TOTAL	52,182	51,653	50,126	47,420	48,249	46,862	47,291	47,048	52,044	56,742

Proportion by Type of Cement



Cement Sales



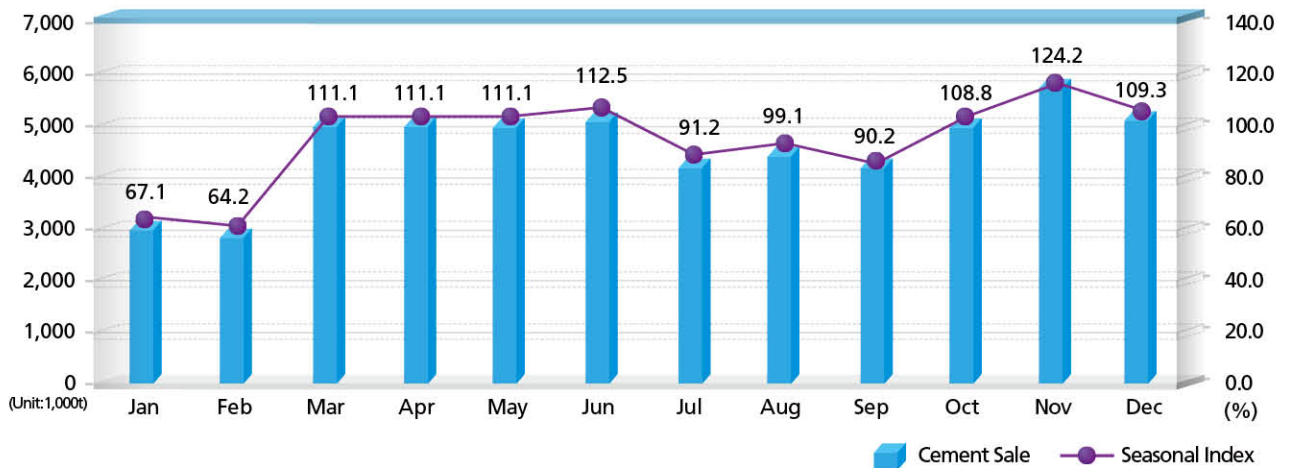
Sale of the Companies

(Unit:1,000t)

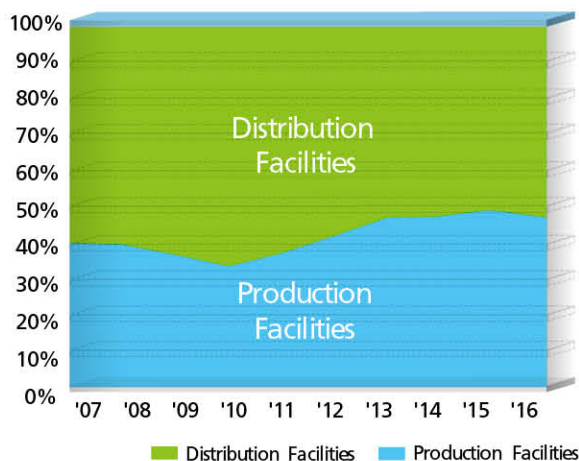
Year	Sampyo	Ssangyong	Hanil	Hyundai	Asia	Sungshin	Halla	Hankook	Others	TOTAL
2007	8,897	13,923	5,432	5,170	3,079	6,681	7,242	1,447	5,271	57,142
2008	8,666	14,061	5,743	5,348	3,085	6,807	7,490	1,560	4,377	57,137
2009	7,923	13,611	5,730	4,939	3,086	6,249	7,094	1,466	2,944	53,042
2010	8,245	13,847	6,372	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	6,131	6,368	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
2014	8,301	13,370	5,941	4,371	3,191	5,775	7,250	1,508	3,525	53,232
2015	8,156	14,076	6,256	4,936	3,712	7,694	7,094	1,851	4,310	58,085
2016	9,088	14,045	7,140	5,287	4,039	7,795	7,125	1,686	4,593	60,798

* Exported Clinker and Cement included.

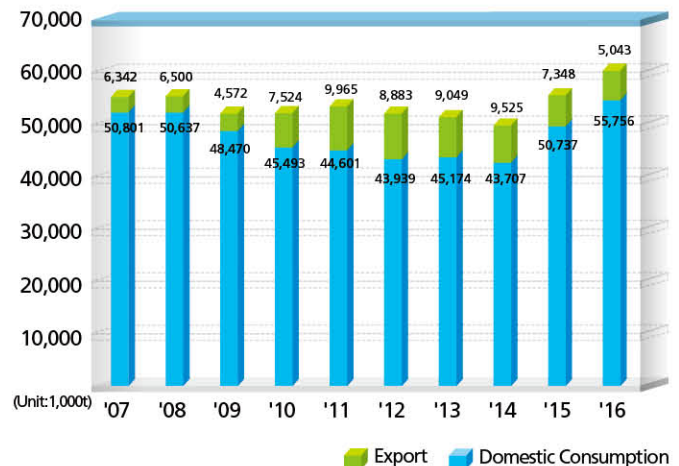
Seasonal Index for Cement Sales of 2016



Sale by Type of Facilities



Sale by Type of Demand



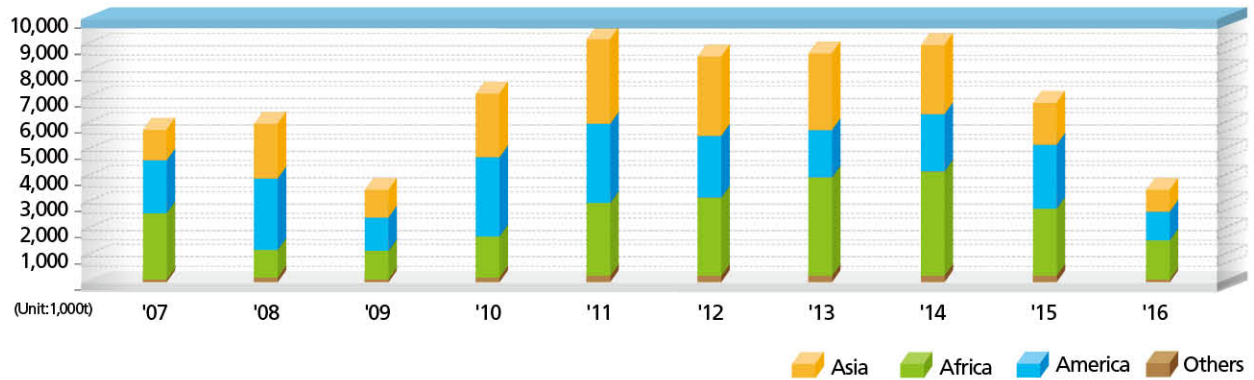
Export & Import



Export

Continent	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Asia	1,062	2,079	1,401	2,305	3,454	2,824	2,828	2,819	1,817	1,329
Africa	2,033	2,575	1,665	2,983	3,224	2,383	1,702	2,285	2,261	1,460
America	3,183	1,692	1,445	2,077	3,045	3,411	4,209	4,139	3,068	2,176
Others	64	154	61	159	242	265	310	282	202	78
Total	6,342	6,500	4,572	7,524	9,965	8,883	9,049	9,525	7,348	5,043

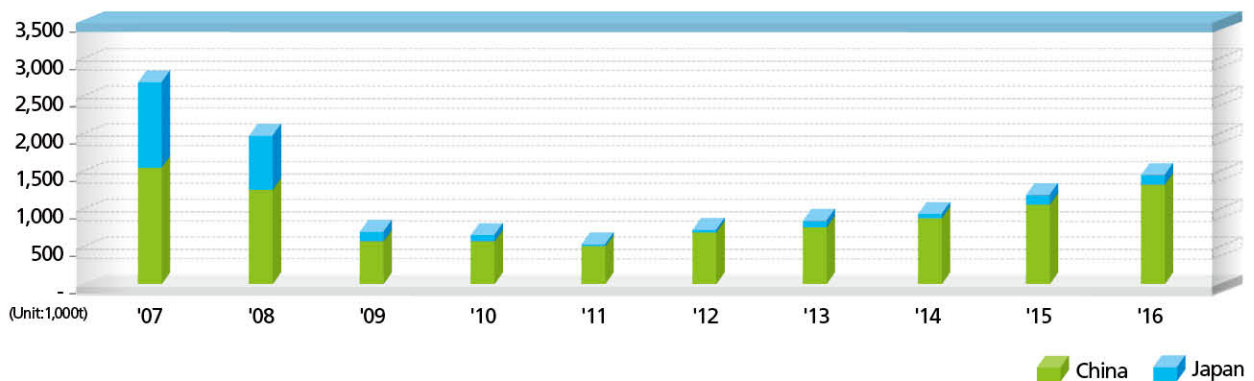
* Export include clinker.



Import

Country	Year	2007	2008	2009	2010	2011	2012	2013	2016	2015	2016
Asia	China	1,271	522	120	80	2	11	101	60	216	183
	Japan	1,646	1,463	711	692	684	719	697	837	942	1,031
Total		2,917	1,985	831	772	686	730	798	897	1,158	1,213

* Import include clinker.



Transportation

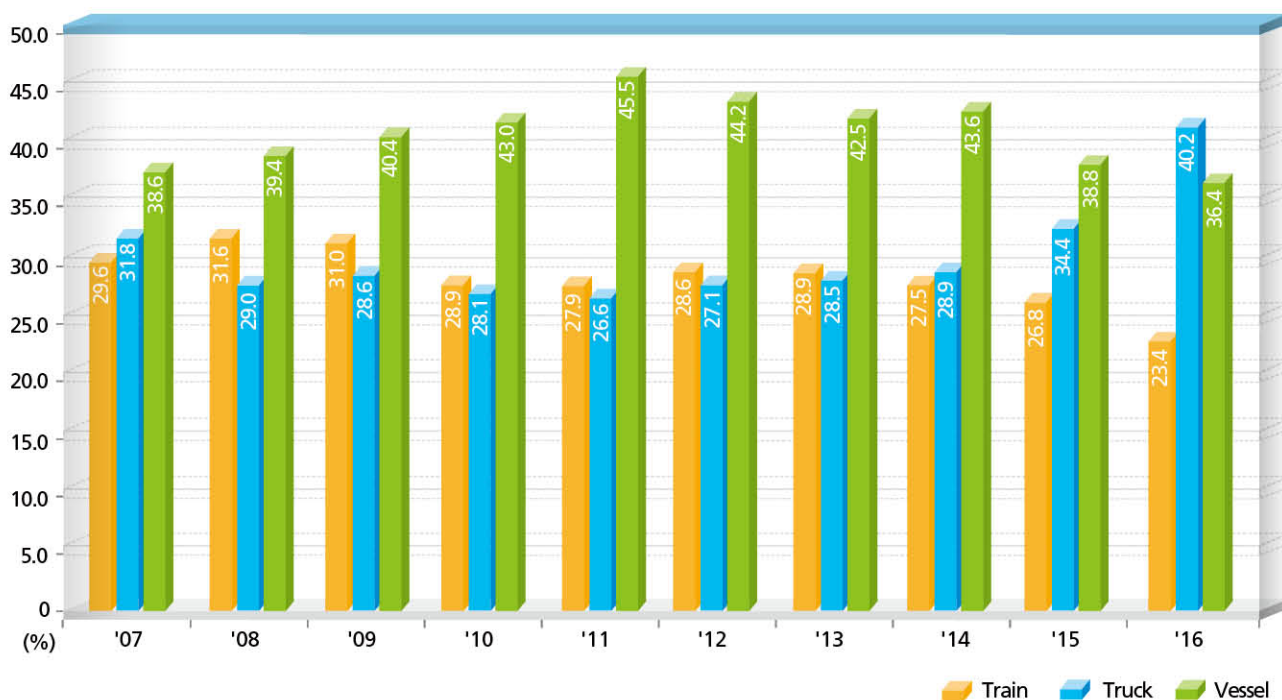


▶ Proportion by Type of Transportation

(Unit:1,000t)

Year	Train		Truck		Vessel		Total
		%		%		%	
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	28.7	20,587	40.4	51,010
2010	14,596	28.8	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	27.1	22,282	44.2	50,363
2013	14,754	28.9	14,534	28.5	21,726	42.6	51,014
2014	14,039	27.5	14,788	28.9	22,268	43.6	51,095
2015	14,747	26.8	18,968	34.4	21,344	38.8	55,059
2016	13,474	23.4	23,159	40.2	20,964	36.4	57,597

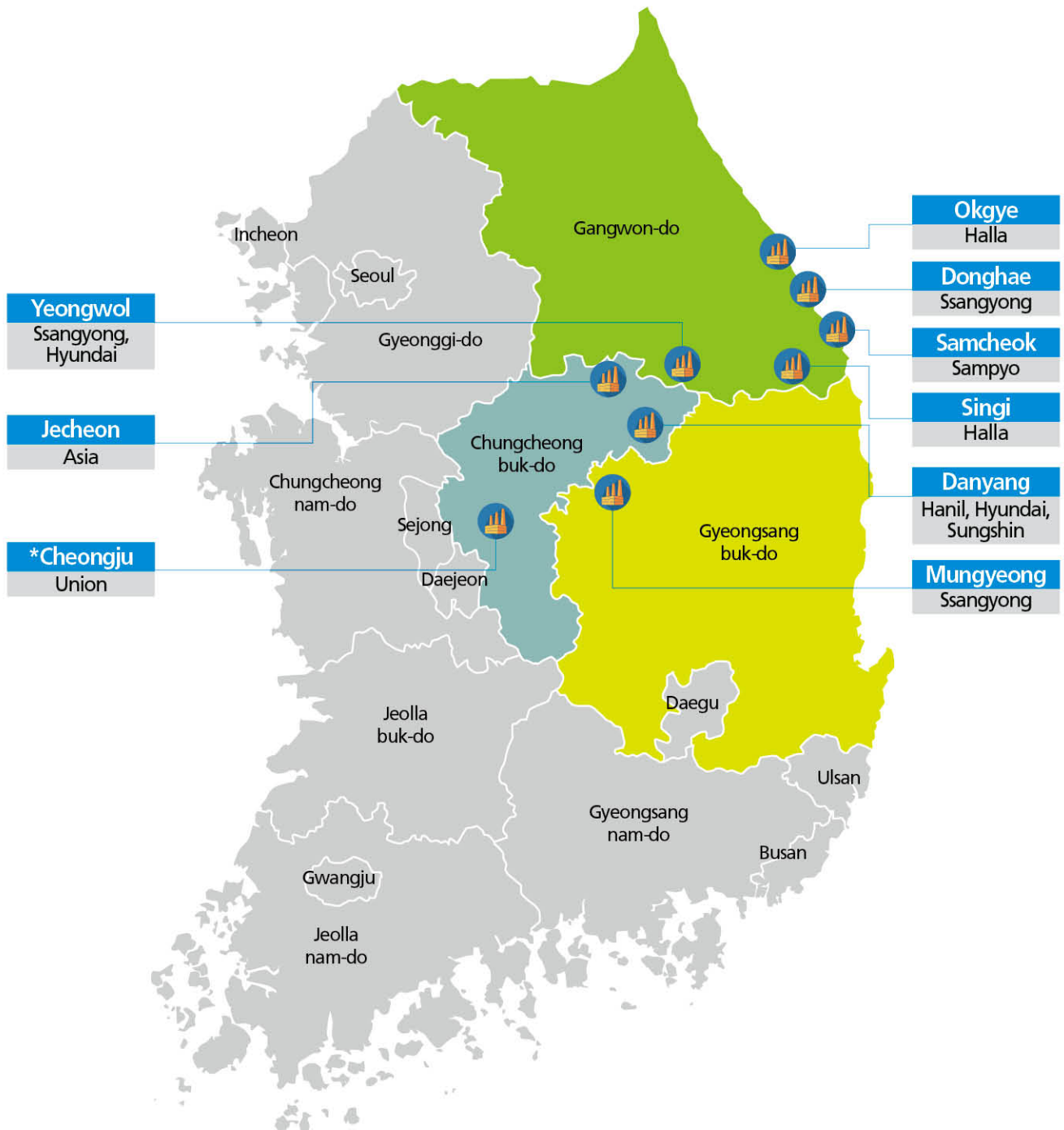
* On the primary stage & Export included.



Location of Kiln Plants



▶ Kiln Plants



* Kiln for white cement

World Cement Information



▶ Leading Countries (2016(F))

(Unit:1,000t)

Ranking	Cement Production		Cement Consumption		Export		Import	
1	China	2,402,950	China	2,395,070	China	17,560	Bangladesh	13,400
2	India	288,810	India	287,840	Vietnam	17,500	U.S.A	11,890
3	U.S.A	85,400	U.S.A	94,500	Iran	15,000	Iraq	6,000
4	Turkey	74,500	Turkey	67,000	Thailand	13,470	Sri Lanka	5,250
5	Vietnam	73,500	Indonesia	62,070	Japan	11,540	Afghanistan	5,220
6	Iran	65,000	Egypt	58,770	United Arab Emirates	11,500	Singapore	5,070
7	Indonesia	61,100	Brazil	57,240	Turkey	10,500	Cambodia	4,720
8	Japan	58,980	Vietnam	56,000	Spain	9,780	Ghana	4,630
9	Egypt	58,890	Korea	55,756	Germany	6,800	Myanmar	4,500
10	Brazil	57,290	Russia	55,650	India	5,880	Kuwait	4,000
11	Korea	56,742	Saudi Arabia	54,800	Pakistan	5,770	Algeria	3,900
12	Saudi Arabia	55,950	Iran	50,000	Greece	5,250	Australia	3,700
13	Russia	54,750	Japan	41,610	Korea	5,043	Hong Kong	3,450
	Total	3,393,862	Total	3,244,696	Total	119,530	Total	64,680

※Source : Global Cement Report 12th

▶ Leading Countries (2017(F))

(Unit:1,000t)

Ranking	Cement Production		Cement Consumption		Export		Import	
1	China	2,370,000	China	2,347,060	China	18,000	Bangladesh	15,200
2	India	297,680	India	296,680	Vietnam	17,760	U.S.A	12,900
3	U.S.A	86,560	U.S.A	98,160	Iran	16,000	Iraq	6,690
4	Turkey	80,000	Turkey	70,640	Thailand	12,300	Sri Lanka	5,700
5	Vietnam	77,800	Indonesia	65,230	Japan	11,000	Afghanistan	5,500
6	Brazil	53,540	Egypt	64,100	United Arab Emirates	9,800	Singapore	5,050
7	Russian	55,450	Vietnam	53,390	Turkey	9,800	Cambodia	4,840
8	Saudi Arabia	50,760	Russian	60,040	Spain	9,360	Myanmar	4,700
9	Iran	67,970	Korea	54,290	Germany	6,900	Ghana	4,690
10	Indonesia	65,430	Brazil	54,550	India	5,950	Kuwait	4,100
11	Japan	59,500	Iran	49,860	Pakistan	5,500	Australia	4,000
12	Egypt	64,300	Saudi Arabia	51,970	Greece	5,420	Côte d'Ivoire	3,720
13	Korea	55,290	Japan	43,630	Korea	5,300	Hong Kong	3,480
	Total	3,384,280	Total	3,214,000	Total	116,870	Total	69,370

※Source : Global Cement Report 12th

Member of the Companies



SAMPYO CEMENT CO., LTD.



Head Office	(25930) 20, Tongyang-gil, Samcheok-si, Gangwon-do
CEO	Choi, Byung-Kil
Establishment	June 15, 1957
Assets	1,152(billion won)
No. of Employees	805
Clinker Capacity	10,045 (1,000ton)
Kiln plants(mill plants)	1(3)
Contact Information	Tel 82-33-571-7000 Fax 82-33-572-5541 http://www.sampyocement.co.kr

SSANGYONG CEMENT CO., LTD.



Head Office	(04555) Citycentertower, 34, Soopyo-ro, Jung-gu, Seoul
CEO	Hwang, Dong-Chul
Establishment	May 14, 1962
Assets	2,533(billion won)
No. of Employees	904
Clinker Capacity	15,326 (1,000ton)
Kiln plants(mill plants)	3(6)
Contact Information	Tel 82-2-2270-5114 Fax 82-2-2270-5577 http://www.ssangyongcement.co.kr

HANIL CEMENT CO., LTD.



Head Office	(06252) Udeok Bldg., 330, Gangnam-daero, Gangnam-gu, Seoul
CEO	Kwak, Eui-Young
Establishment	December 28, 1961
Assets	1,936(billion won)
No. of Employees	616
Clinker Capacity	7,131(1,000ton)
Kiln plants(mill plants)	1(4)
Contact Information	Tel 82-2-531-7000 Fax 82-2-531-7115 http://www.hanilcement.com

HYUNDAI CEMENT CO., LTD.



Head Office	(06619) 398, Seocho-daero, Seocho-gu, Seoul
CEO	Lee, Joo-Whan
Establishment	September 15, 1963
Assets	520(billion won)
No. of Employees	385
Clinker Capacity	6,864 (1,000ton)
Kiln plants(mill plants)	2(2)
Contact Information	Tel 82-2-520-2114 Fax 82-2-520-2118 http://www.hdcement.co.kr

ASIA CEMENT CO., LTD.



Head Office	(06223) ASEA Tower Bldg., 430, Nonhyeon-ro, Gangnam-gu, Seoul
CEO	Lee, Hoon-Beom
Establishment	April 26, 1957
Assets	794(billion won)
No. of Employees	463
Clinker Capacity	4,146(1,000ton)
Kiln plants(mill plants)	1(2)
Contact Information	Tel 82-2-527-6500 Fax 82-2-527-6699 http://www.asiacement.co.kr

Member of the Companies



SUNGSHIN CEMENT CO., LTD.



Head Office	(03162) Taehwa Bldg., 29, Insadong 5-gil, Jongno-gu, Seoul
CEO	Kim, Sang-Kyu
Establishment	March, 16 1967
Assets	1,009(billion won)
No. of Employees	695
Clinker Capacity	9,686(1,000ton)
Kiln plants(mill plants)	1(2)
Contact Information	Tel 82-2-3782-7000 Fax 82-3782-7049 http://www.sscem.com

HALLA CEMENT CORPORATION



Head Office	(25645) 225, Sangye-gil, Okgye-myeon, Gangneung-si, Gangwon-do
CEO	Moon, Jong-Goo
Establishment	December 27, 1998
Assets	626(billion won)
No. of Employees	511
Clinker Capacity	8,184 (1,000ton)
Kiln plants(mill plants)	2(3)
Contact Information	Tel 82-33-534-1000 Fax 82-33-534-0716 http://www.hallacement.co.kr

HANKOOK CEMENT & TEXTILE CO., LTD.



Head Office	(61228) 239, Mudeung-ro, Buk-gu, Gwangju
CEO	Kim, Hoon-Seok
Establishment	February 18, 1976
Assets	184(billion won)
No. of Employees	195
Clinker Capacity	NIX(1,000ton)
Kiln plants(mill plants)	(1)
Contact Information	Tel 82-62-519-1600 Fax 82-62-527-1734 http://www.hcnt.co.kr

UNION CORPORATION



Head Office	(04532) 13th Fl., OCI Bldg., 94, Sogong-ro, Jung-gu, Seoul
CEO	Kang, Byeong-Ho
Establishment	December 6, 1952
Assets	164(billion won)
No. of Employees	226
Clinker Capacity	145(1,000ton)
Kiln plants(mill plants)	1(1)
Contact Information	Tel 82-2-757-3801 Fax 82-2-757-3807 ~ 8 http://www.union21.co.kr

* Clinker for White Cement

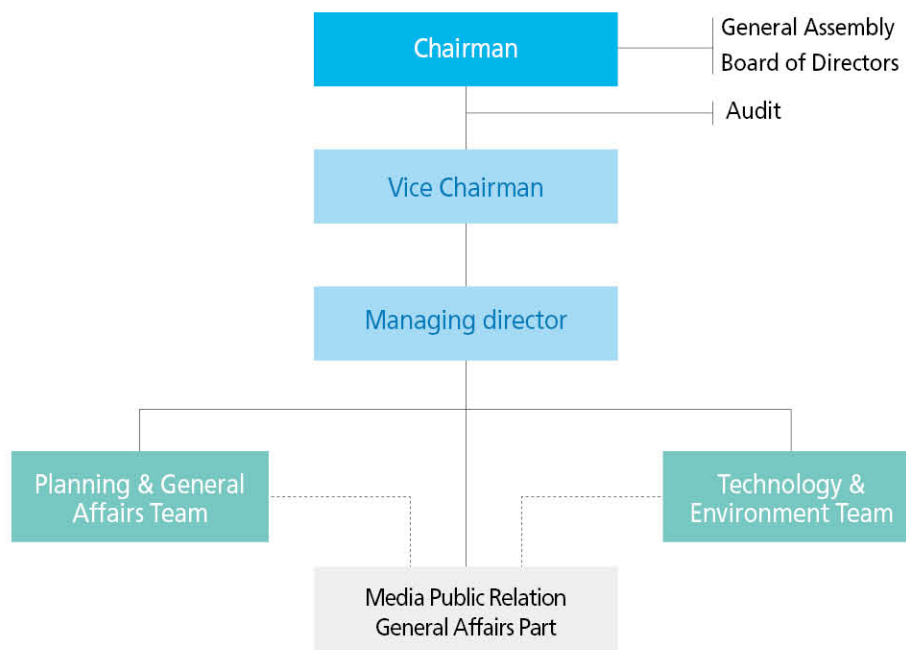


Introduction to the Korea Cement Association

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

16F, Samil-Plaza Bldg, 14, Dogok-ro 1-gil, Gangnam-Gu, Seoul, Korea 06253
 Tel : +82-2-538-8235 Fax : +82-2-538-1720 <http://www.cement.or.kr>