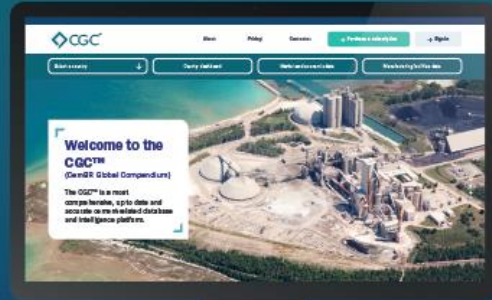


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2021 UPDATES

Countries included:

Algeria
Egypt
Kuwait
Qatar



2021 quick updates

Algeria

2021 continued the declining trend of the last three years in Algeria. Cement consumption declined by close to 7% over 2020. This drop in domestic demand coupled with a continuous supply growth in the last five years has led to unfavourable cement utilisation rates, below 50%. There is a timid attempt to increase exports from the country, but they remain at very low levels. Domestic logistics and port related issues prove challenging for exports.

Egypt

Following an almost 4% drop in cement consumption in 2020, Egypt recovered in 2021 with a 5.5% growth over the previous year. Nevertheless, the 2021 consumption level was 12% lower than the last twelve years high of 2010. In 2021 exports also expanded significantly (they doubled over 2020) and they were the highest they have been since 2013. Capacity also increased in 2021 by around 2.0 million tonnes keeping utilisation rates at subdued levels (mid 50%s).

Kuwait

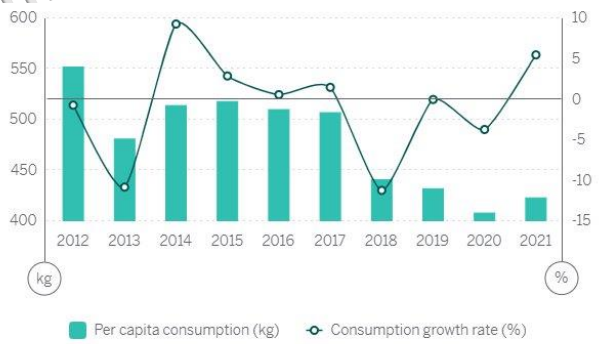
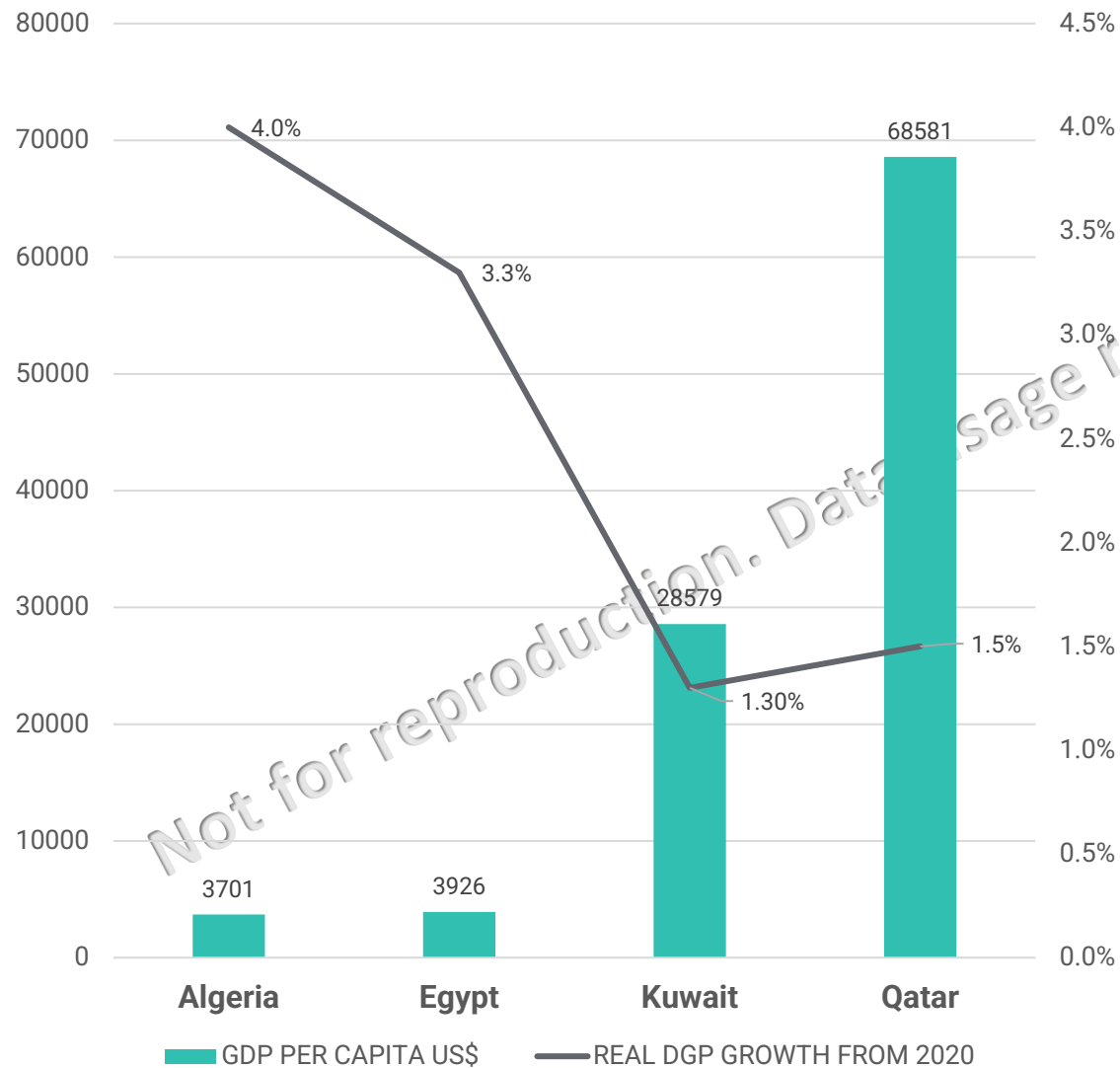
After experiencing an almost catastrophic 2020 when cement consumption declined by a whopping 35%, the market recovered in 2021 with a growth of close to 17%. Still, in absolute terms, cement consumption in 2021 stood at around 27% lower than the decade high of 2016. There was an additional 1.0 million tonnes of new capacity in 2021 keeping utilisation rates at extremely low levels.

Qatar

The 7.5% decline in cement consumption in 2020 was followed by a recovery in the market of around 9.5% in 2021. Imports almost doubled, but they remain at very low level representing around 3% of total domestic consumption. there was no change in the manufacturing configuration of the industry in 2021 which led to an increase in utilisation rates of around four percentage points.

2021 Updates – Key macroeconomic and cement related figures

Macro 2021



Algeria



Egypt

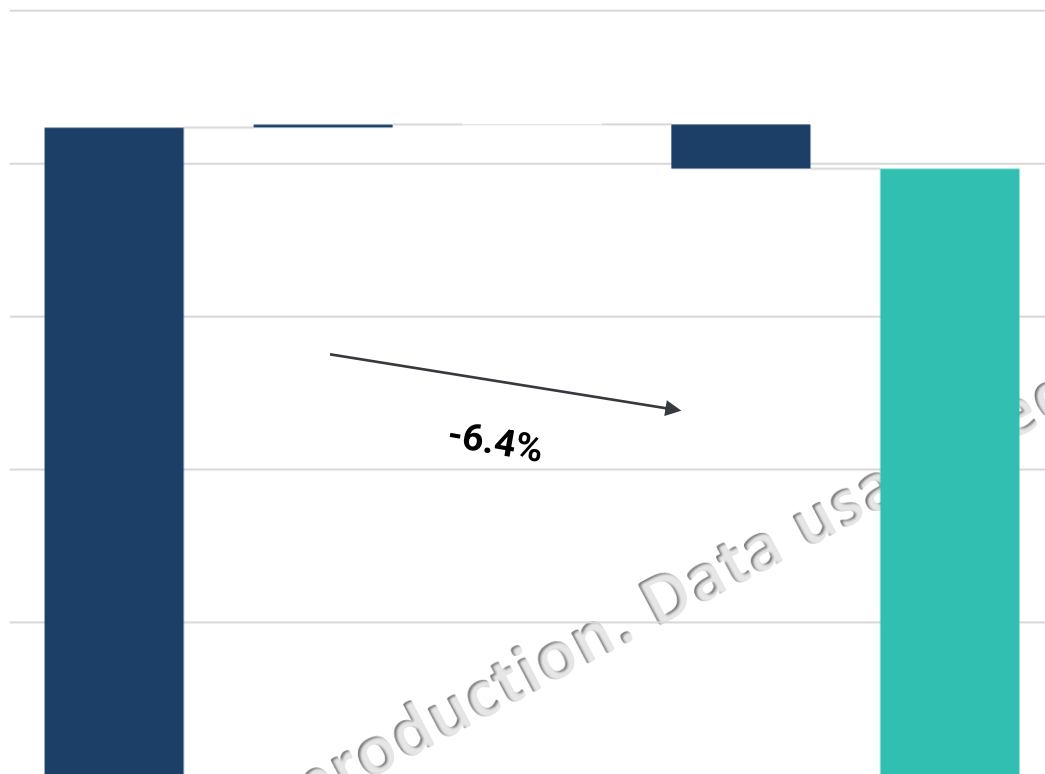


Kuwait

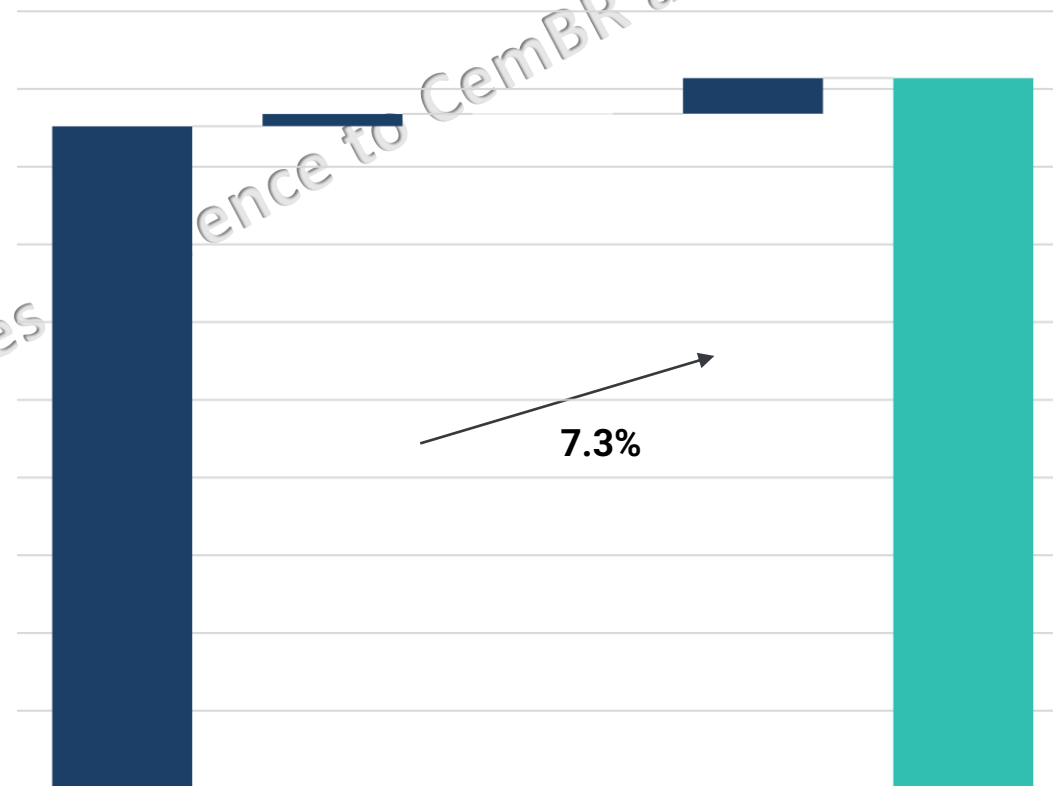
Qatar

2021 Updates – Key cement related figures (production, domestic growth, and trading)

Algeria / MT



Egypt / MT



Production 2020

Exports growth 2021

Imports growth 2021

Domestic growth 2021

Production 2021

Production 2020

Exports growth 2021

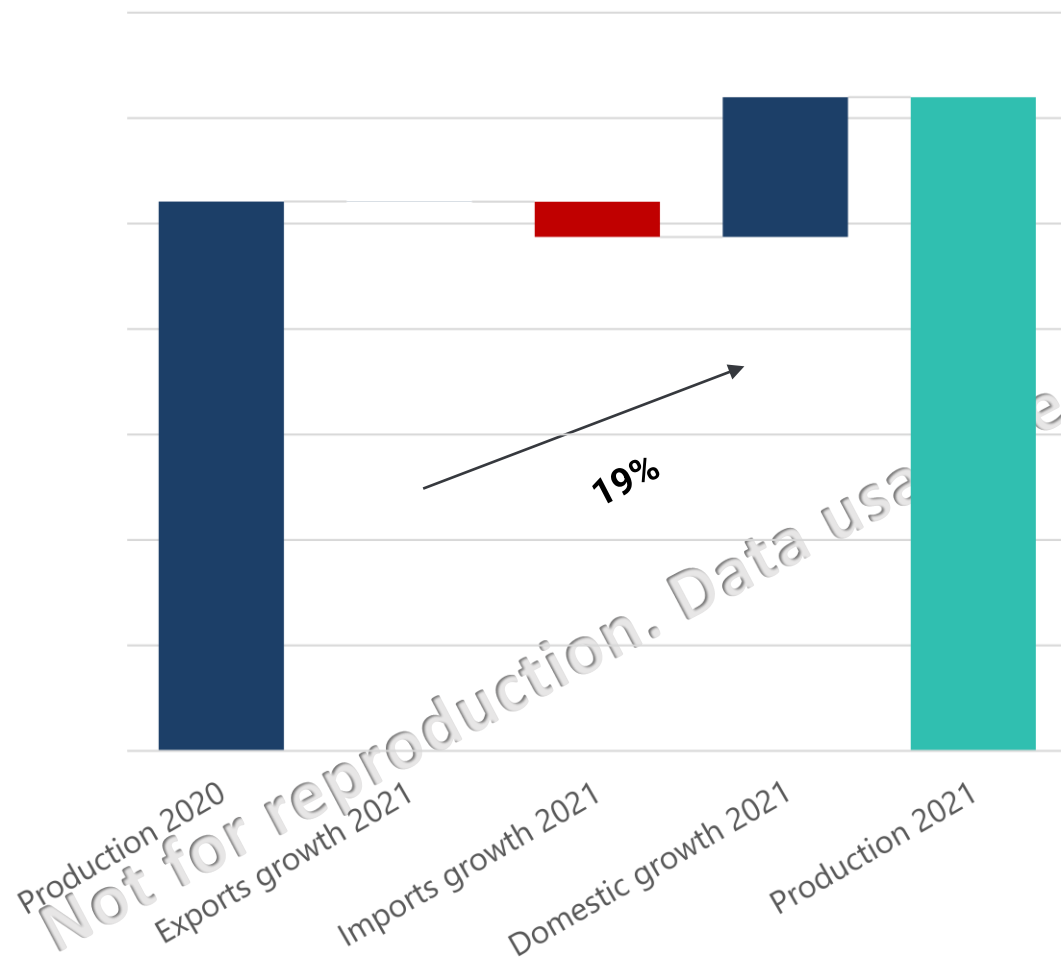
Imports growth 2021

Domestic growth 2021

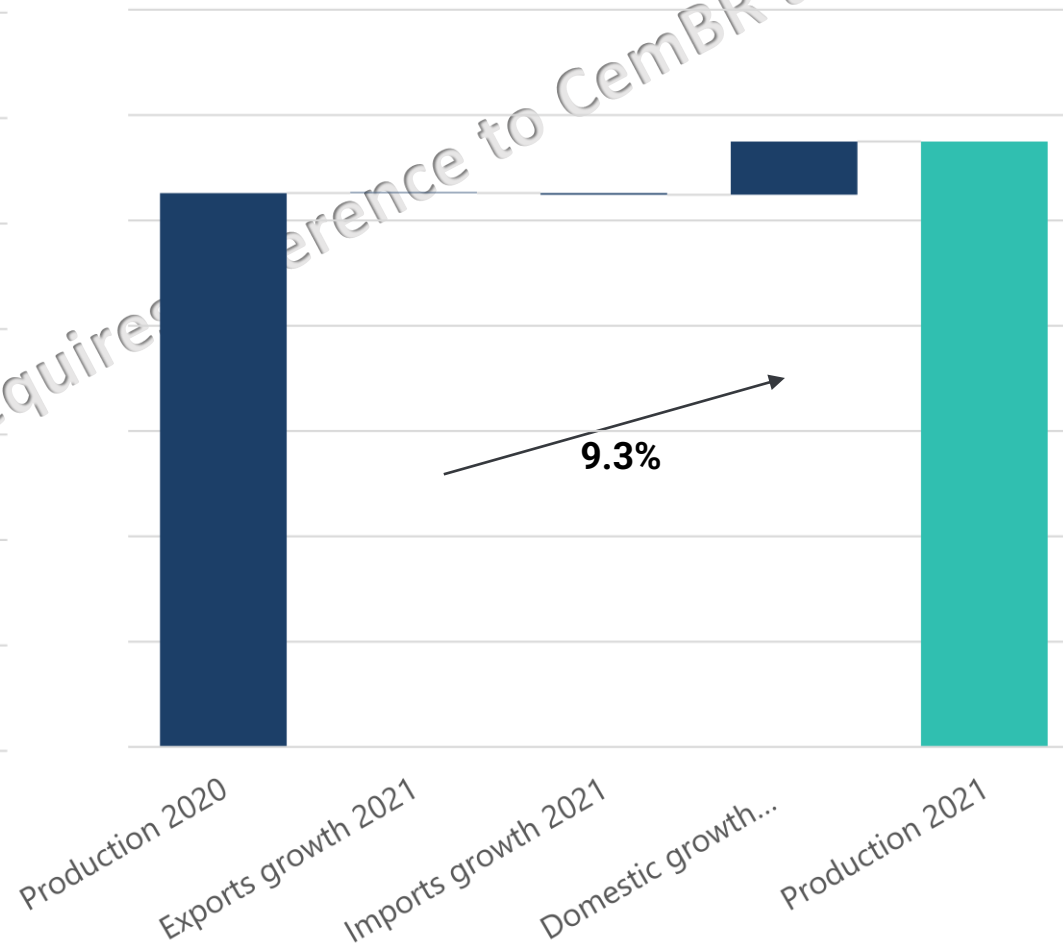
Production 2021

2021 Updates – Key cement related figures (production, domestic growth, and trading)

Kuwait/ MT



Qatar/ MT





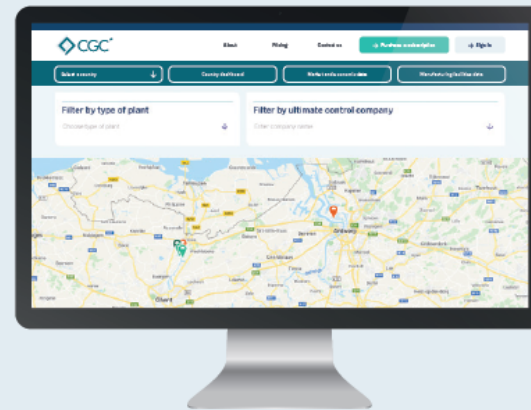
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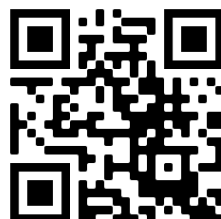
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