



# Americas

North sub-region

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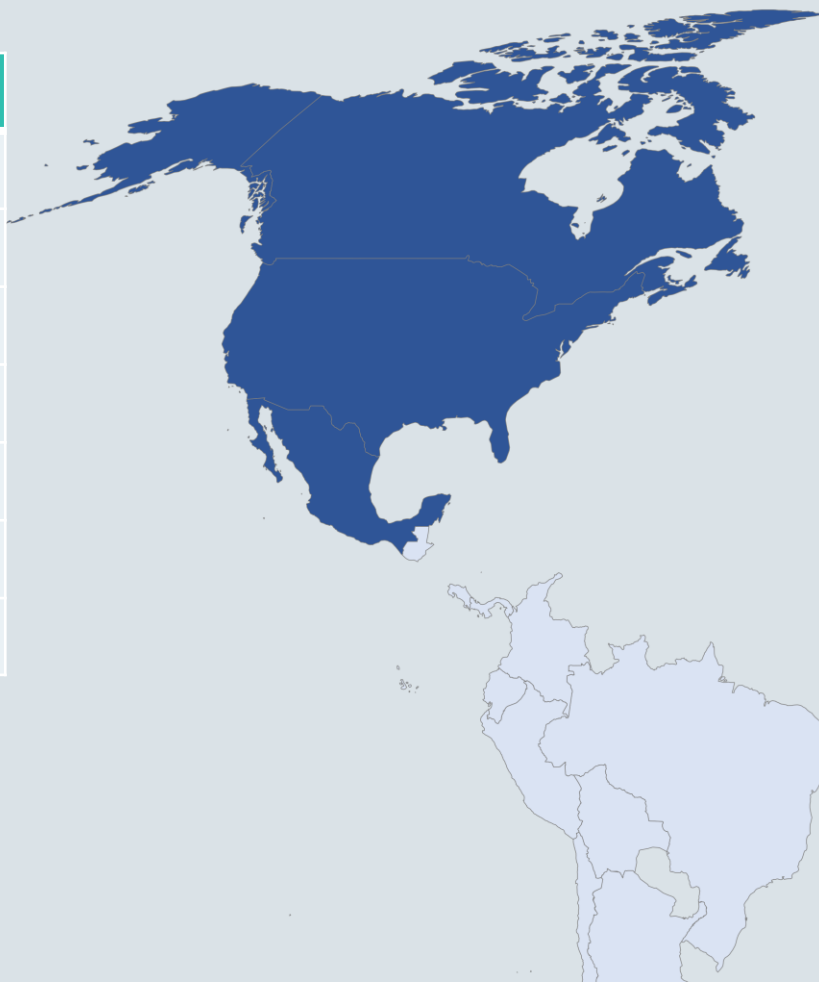
2020 updates and forecasts summary  
to 2025



The ultimate "intelligence" provider in the global cement sector  
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## CemBR Region: Americas/ Sub-region: North

NORTH	CENTRAL	SOUTH
Canada	Costa Rica	Argentina
Mexico	Guatemala	Bolivia
USA	Panama	Brazil
		Chile
		Colombia
		Ecuador
		Peru



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## 2020 Updates of CemBR Region: Americas/ Sub-region: North

### Canada:

A 4% decline in 2020 led to a 10 million tonne consumption during the year. The Canadian cement market has been oscillating around the 10 million mark for the last ten years. There was of course a degree of volatility with four years registering growth whereas the remaining six experiencing a decline. On the other hand, during the last ten years the industry has increased its exports, reaching 4.1 million tonnes in 2020 (slightly lower than 2019).

This has kept the cement utilisation rates around 70-75% over the last decade. As the main bulk of exports are directed to the USA market, the reliance of the Canadian cement industry on the USA cannot be overemphasised.

### Mexico:

2020 proved a resilient year for the Mexican cement market. The continuous decline between 2016 and 2019 was halted in 2020 by a close to 5% cement consumption recovery. Demand thus reached just over 40 million tonnes. At the same time, exports have continued their upward trend which started in 2016, reaching close to 1.7 million tonnes in 2020.

CEMEX dominates the market with approximately 40% of total cement milling capacity, with LafargeHolcim (now Holcim) second with around 20% of total capacity.

### United States:

Jun 2021: Lehigh Cement Company and Keystone Cement Company abandoned their proposed merger after the FTC (Federal Trade Commission) announced that it was challenging the acquisition initially announced in September 2019.

May 2021: Lehigh Hanson announced the sale of its US West region business to Martin Marietta for USD2.3 billion. The transaction includes two cement plants, Redding, and Tehachapi, among other assets.

Apr 2021: After obtaining regulatory approval from authorities in Brazil, Canada and the United States, St. Marys Cement starts the integration process with McInnis Cement.

Lots is happening in the USA, but with a Consolidation Index of 890, the industry is still highly fragmented. Resilient demand in 2020 has concluded a decade long uninterrupted growth. At the same time imports have grown from around 6.0 million tonnes in 2013 to over 14 million tonnes in 2020. Clinker imports have doubled at the same time.

2020 insights and data  
from CemBR's Intelligence  
Platform:





## Forecasts to 2025 of CemBR Region: Americas/ Sub-region: North

Supply - demand to 2025 in million tonnes and DCUF



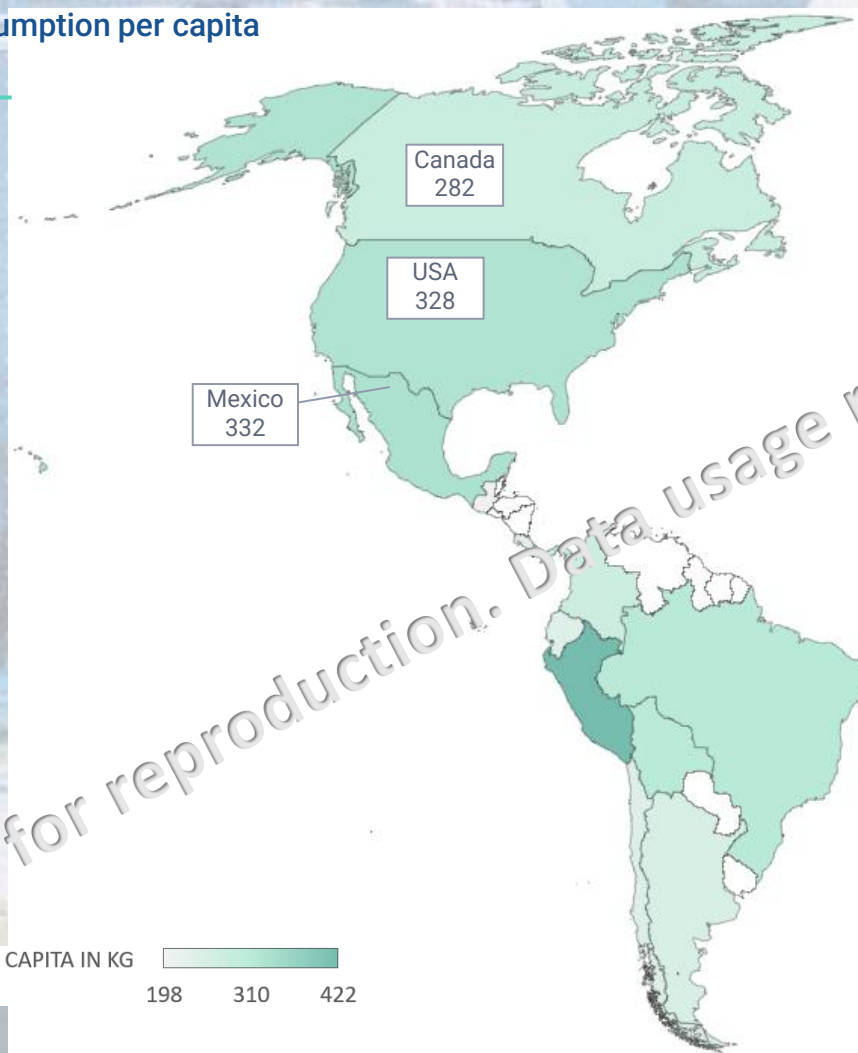
DCUF™: Domestic demand / domestic capacity

Insights and data from  
CemBR's Intelligence  
Platform:



## Forecasts to 2025 of CemBR Region: Americas/ Sub-region: North

Cement consumption per capita  
in Kg (2025F)



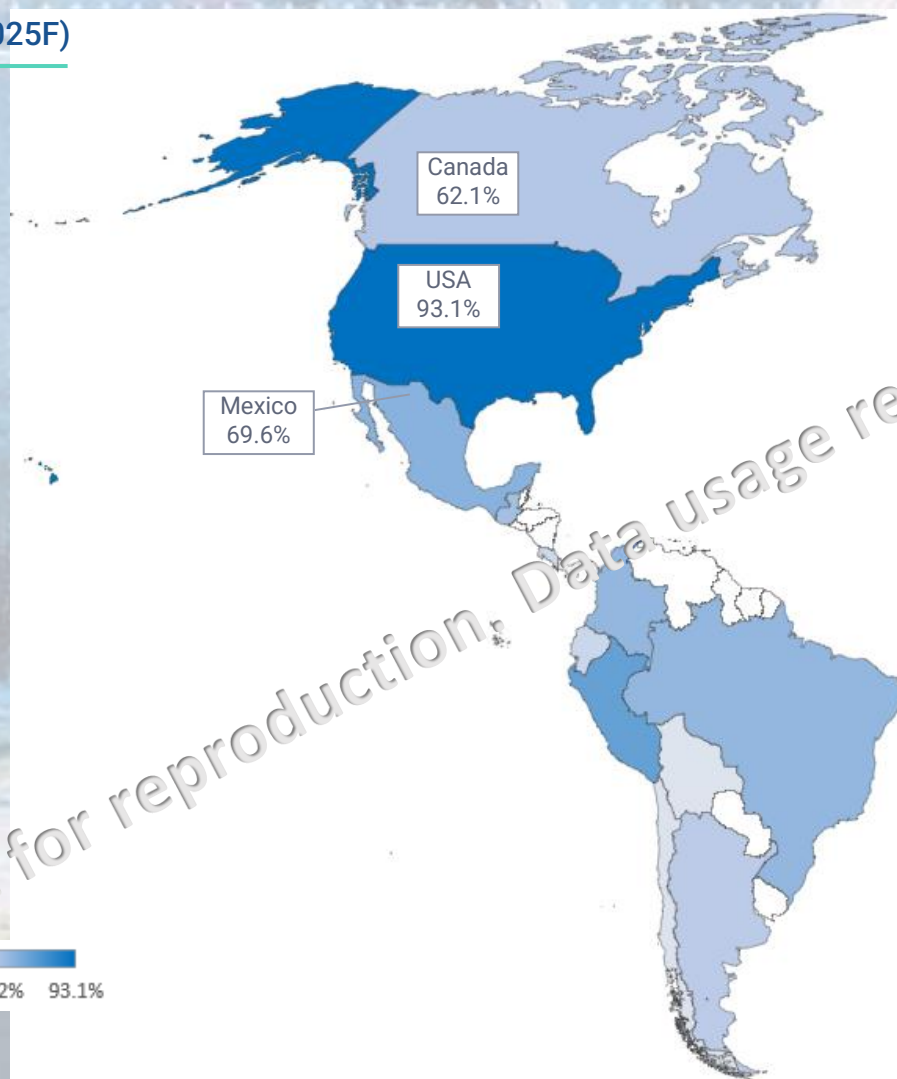
Insights and data from  
CemBR's Intelligence  
Platform:





## Forecasts to 2025 of CemBR Region: Americas/ Sub-region: North

DCUF™ in % (2025F)



DCUF™: Domestic demand / domestic capacity

Insights and data from  
CemBR's Intelligence  
Platform:



## Forecasts to 2025 of CemBR Region: Americas/ Sub-region: North

### MAJOR ISSUES OF THE SUB-REGION:

- Sub region dominated by the USA
- A resilient performance in 2020 and a good recovery in 2021
- The USA is the preferred destination for significant exports from Canada and less so Mexico
- Capacity additions in the sub region are expected to be modest
- Growth beyond 2021 is expected to be subdued
- Utilisation rates are thus expected to improve during the forecasting period
- The high utilisation rates can only be attained if the USA continues to be a strong importing destination for the regional exports

This presentation is just a small excerpt from the vast range of data and insights contained within the CemBR Forecasts report.

A 230 pages forward looking report covering global, regional, and country-by-country data and forecasts to 2025.





## CemBR Forecasts report

The CemBR Forecasts report is based on CemBR's extensive cement related databases, including the CGC™ the most comprehensive, up to date and accurate cement-related database and intelligence platform in the world. The database is monitored on a daily basis. The report is prepared by a team of cement related professionals with extensive experience in the sector.

The report covers

**95%**  
of global cement consumption

The projections are based on several research and analysis tools employed by CemBR, and they incorporate the views of CemBR's extensive network of cement professionals. Projections are thus real-life point to point assessments for the first two years, clearly identifying market inflections (including declines). The last three years of projections are based on CemBR's rigorous trend-based model providing realistic outcomes for cement consumption.

## Report contents

The CemBR Forecasts report contains two sections:

### Global and regional section

Five year global and regional forecasts covering the 90 largest markets representing around 95% of global cement consumption. Indicators include demand, supply, utilisation rates, and growth rates.

Plus, several aggregated cement related indicators globally and regionally for the last ten years including:

- GDP, average GDP per capita and population
- Cement capacity and utilisation rates
- Cement consumption and average consumption per capita
- Number of cement plants
- Top 15 cement markets (by production, consumption, imports and exports)
- Heat maps showing several cement related indicators

### Country section

Forward looking data, narrative and five-year projections on the:

**60**

largest cement markets in the world

#### Five-year forecasts on...

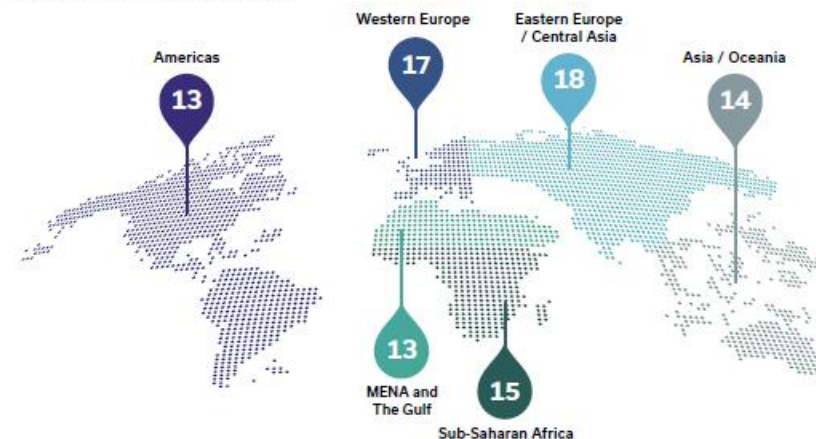
- Macroeconomic and construction indicators
- Cement capacity
- Cement consumption and consumption per capita
- Supply-demand balance, excess/deficit capacity

#### Data and insights on...

- Macroeconomic and construction activity insights - forward looking
- Current cement assets data (number of plants, cement capacity, cement utilisation rate)
- Narrative and insights on new supply, M&A activity
- Detailed historical data on trading and its impact on supply-demand balance. Insights of impact of trading going forward.
- The data, insights, and cement related indicators contained within the report are extensive, up to date, and accurate reflecting our team's cement expertise and experience.

## Regions represented

Number of markets by region



The 90 countries included in the global and regional sections of this report provide a truly representative picture of the cement market, as they represent 95% of total global cement consumption. CemBR is adding more and more countries in our global database, with a view to include all meaningful cement markets in the world soon.

## The country section includes the following markets

Americas	Western Europe	Eastern Europe / Central Asia	MENA and The Gulf	Sub-Saharan Africa	Asia/Oceania
Argentina	Austria	Croatia	Algeria	Angola	Australia
Bolivia	Belgium	Czech Republic	Egypt	Ethiopia	Bangladesh
Brazil	France	Hungary	Iraq	Ghana	India
Canada	Germany	Kazakhstan	Morocco	Kenya	Indonesia
Chile	Greece	Poland	Qatar	Mozambique	Japan
Colombia	Ireland	Romania	Saudi Arabia	Nigeria	Malaysia
Ecuador	Italy	Russia	Tunisia	Senegal	Pakistan
Mexico	Portugal	Ukraine	Turkey	South Africa	Philippines
Peru	Spain	Uzbekistan	United Arab Emirates	Tanzania	South Korea
USA	Switzerland			Uganda	Thailand
	UK				Vietnam

These 60 markets have been selected based on a) their size, b) on their characteristics making them interesting to a larger audience, and c) they represent the most important markets in their respective regions.





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**Our websites:**

For CemBR Forecasts  
**[cembrgroup.com](http://cembrgroup.com)**

For the CGC:  
**[cembrcgc.com](http://cembrcgc.com)**