CemBR Clinker 2020-2025

December 2021

CemBR

The ultimate “intelligence” provider in the global cement sector

cembrgroup.com

CemBR coverage universe

CemBR Clinker & The CGC™

The largest 90 cement markets in the world representing approximately 95% of global cement consumption.

CemBR monitors:
1865 cement producing plants
1350 clinker producing plants
2,300 individual kilns

* All above plant data is ex-China

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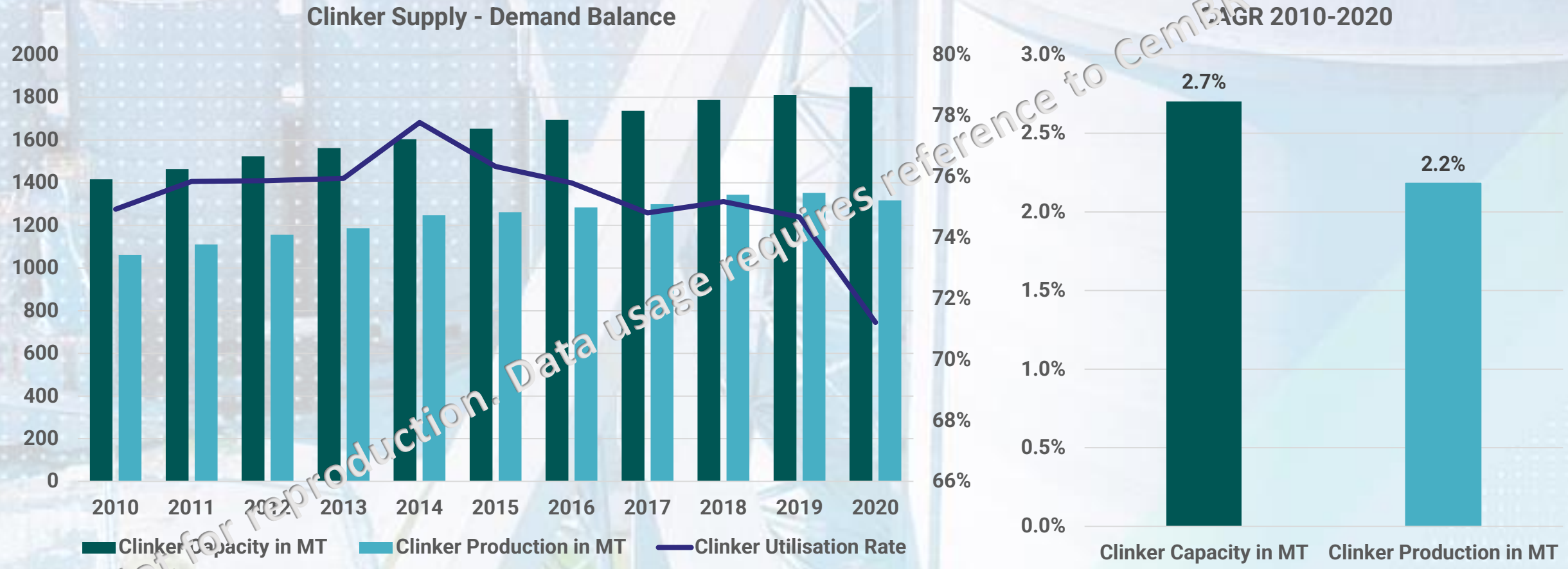
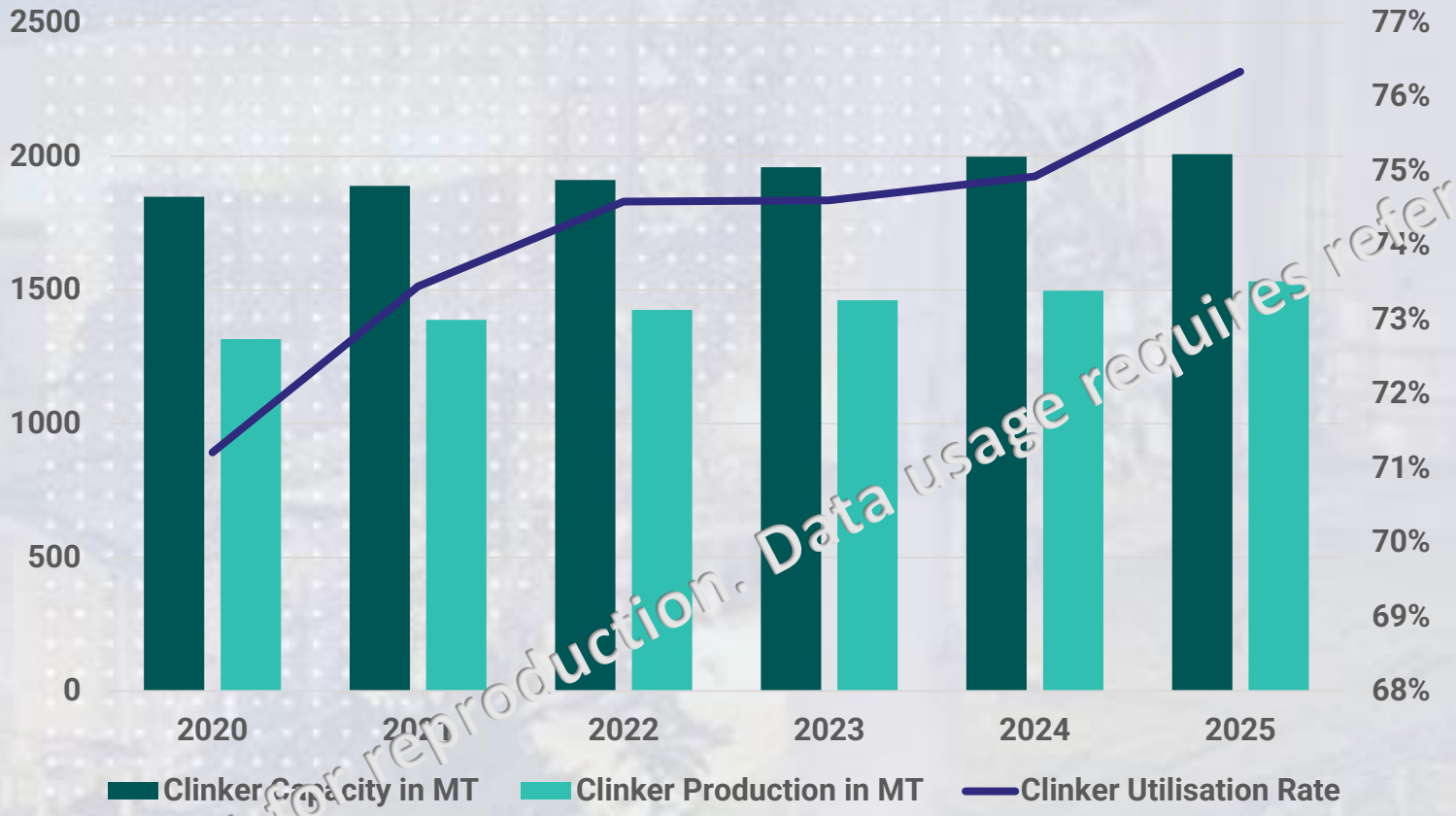
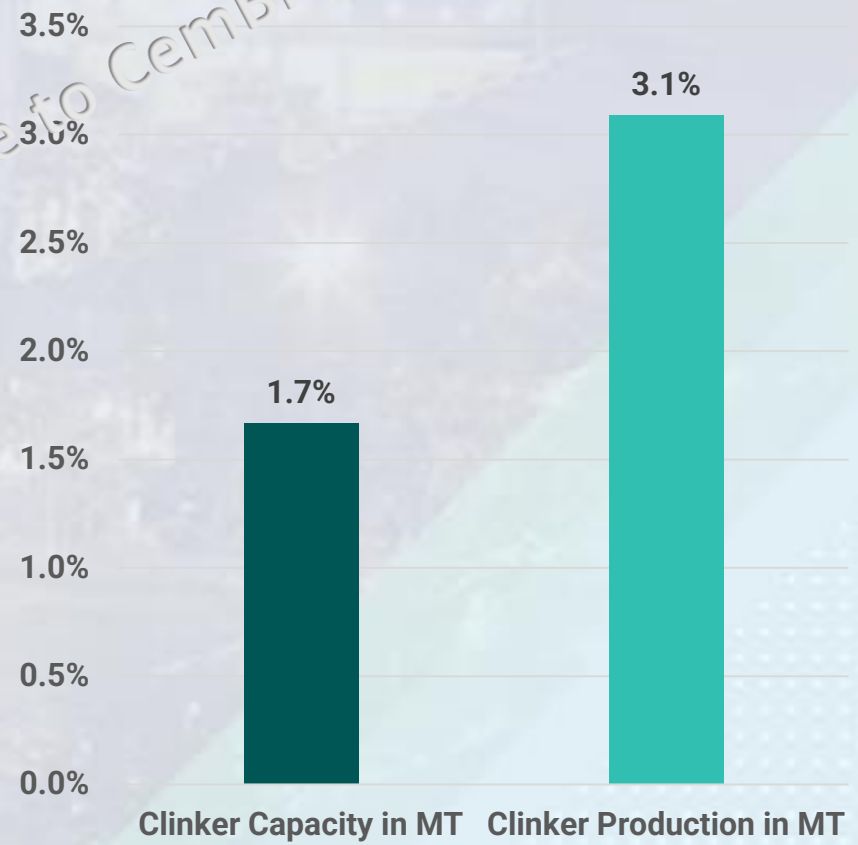
Clinker data 2010 – 2020 (Ex – China)



Source: CGC™ CemBR CLINKER

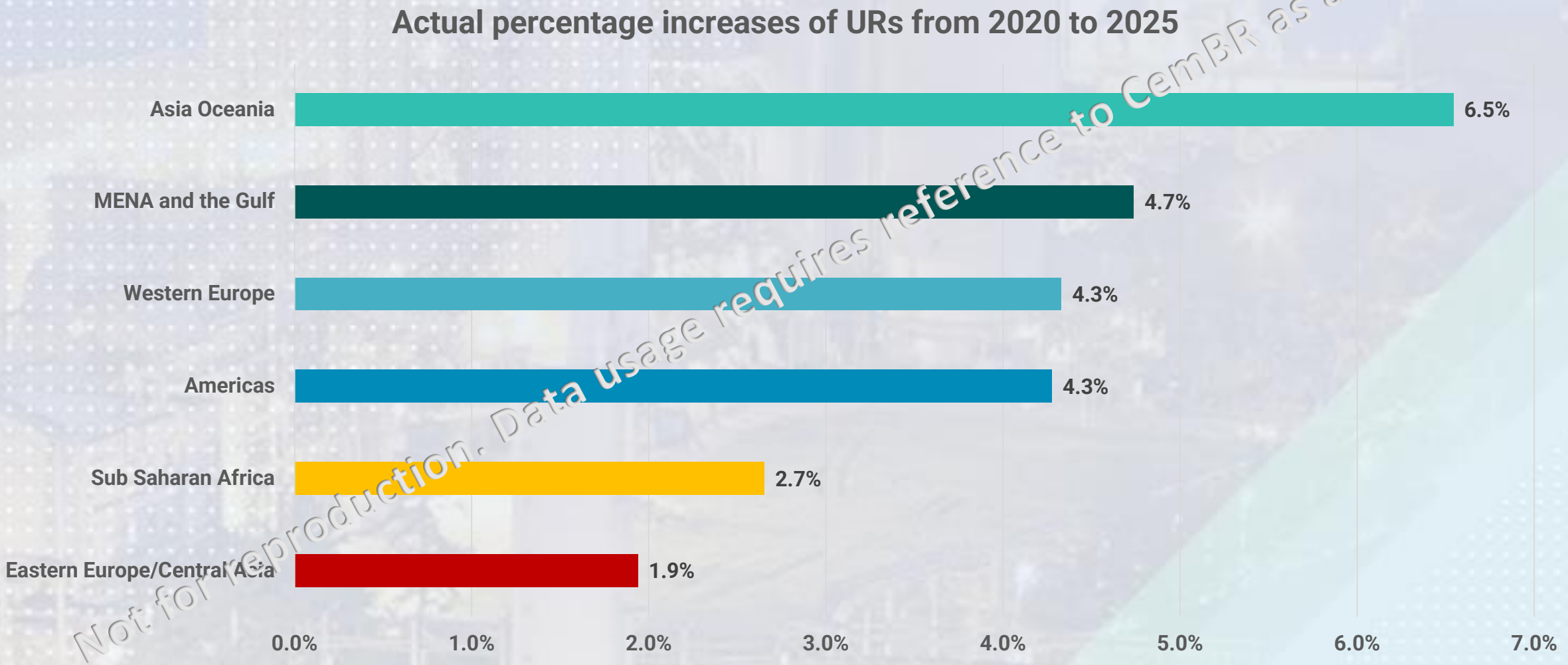
Clinker Projections – Production and Utilisation Rates 2020 – 2025 (Ex – China)





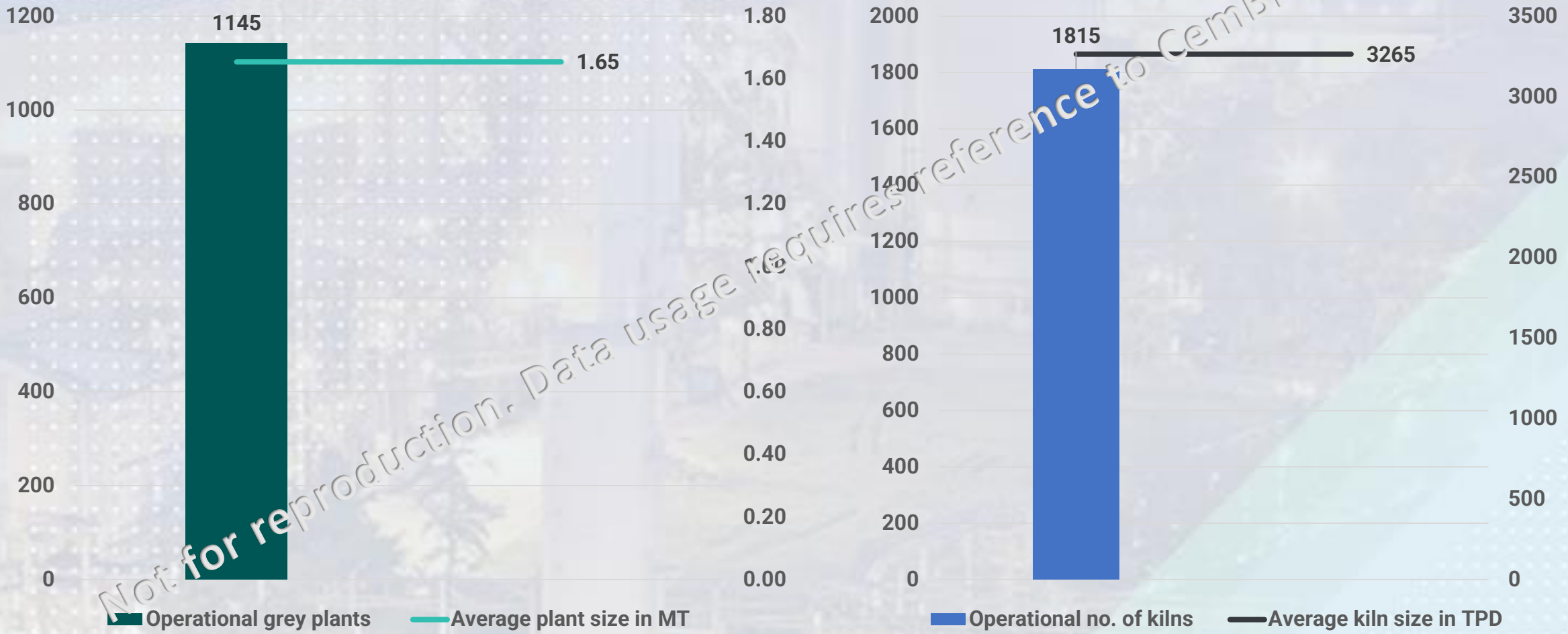
Source: CemBR CLINKER

Clinker Projections – Regional Utilisation Rates Projections 2020 – 2025 (Ex – China)



Source: CemBR CLINKER

Clinker Projections – Current clinker asset configuration (Ex – China)



Source: CemBR CLINKER

CemBR Clinker report

The CemBR Clinker 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, and CemBR's integrated cement plants and kilns proprietary database containing in-depth details on around 1,350 integrated plants and around 2,300 kilns globally (excluding China). 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 is based on

1,350

clinker producing plants and

2,300 **kilns**

The projections are based on CemBR Forecasts, a cement related report published by CemBR on a yearly basis.

The CemBR Clinker report contains two sections, The Global and Regional section, and the Country section. The Global and Regional section is based on the assessment of the 90 largest cement producing countries representing close to 90% of total clinker producing capacity in the world excluding China. The Country section contains a detailed depiction of the 60 largest cement industries in the world.

Report contents

Global and regional section

Five year global and regional forecasts covering the 90 largest markets. Indicators include demand, supply, utilisation rates, and clinker trading. Plus, Several aggregated clinker related indicators for the last ten years including:

- Clinker capacity
- Clinker production
- Clinker utilisation rates

Also, detailed current data on:

- Number of plants
- Number of kilns
- Average kiln size

Country section

Detailed data, insights, and forecasts for the:

60

largest cement industries in the world

- Current clinker producing asset data (No of plants, clinker capacity, number of kilns, average kiln size)
- Number of kilns installed by time period
- Clinker capacity installed by time period
- Number of kilns by size
- Commentary on above data
- Clinker utilisation rates – current year and last five years average
- Commentary on utilisation rates trends
- Five- year forecasts for new clinker capacity additions
- Clinker production forecasts
- Clinker supply-demand balance and trading
- 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.

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Colombia

General data 2020

CemBR region: Americas

Area in square KM: 1,142,000

Population: 50.9 million

Comparative economy size: 44/193

GDP per capita in US$: 5,336

Current clinker asset overview

Number of integrated plants	14
Clinker capacity (MT)	10.4
Number of kilns	20
Average kiln size (TPD)	1,631

Cement market data 2020

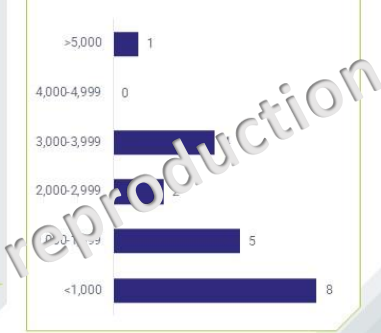
Cement consumption (MT)	11.3
Consumption per capita (Kg)	222
Cement trading net (MT)	0.5
Cement production (MT)	11.8

Current clinker asset configuration

Colombia is the 7th largest clinker industry out of the 13 countries that make up the Americas region. The industry represents 3.9% and 5.6% of the regional totals for clinker capacity and number of kilns. The age of the assets in the industry is above the average for the region. Colombia has 57% of its kilns installed before 1990 whereas the region has almost 50% of its kilns installed at the same time. In terms of kiln size, Colombia's average is much smaller than the regional average (2,368 TPD). Around 65% of kilns are preheater/precalciner (5 stages).

Asset configuration by time period

Number of kilns by size (TPD)



Colombia

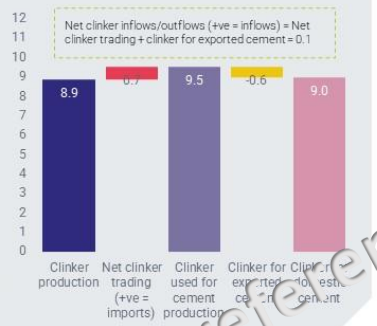
Current clinker statistics

2020 Clinker utilization rate	85%
Last 5Y clinker utilization rate	94%

In 2020, clinker production stood at 8.9 million tonnes resulting in a 85% clinker utilisation rate.

Colombia's cement consumption experienced a spectacular growth in the first part of 2010s. Since that time, the country has experienced significant net clinker inflows culminating at 520,000 tonnes in 2017. In 2020, cement consumption saw a significant decline of around 11%, easing the pressure on the industry to produce clinker.

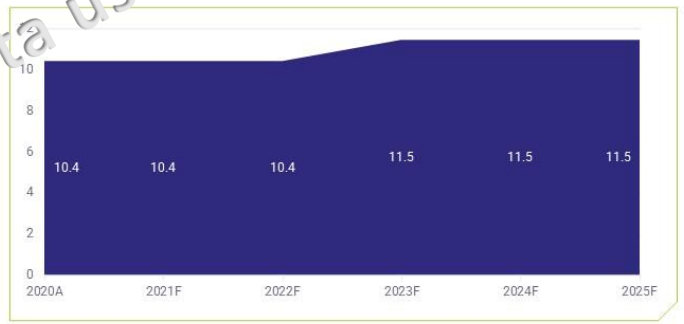
Clinker balance 2020



Clinker supply

There is a new plant expected to be commissioned in 2023 in Colombia. This will add around 1.1 million tonnes of clinker to the market. There was a new integrated plant announced recently, but it has been put on hold at this time.

Clinker supply curve 2020A-2025F



Colombia

Clinker estimates 2020A – 2025F

Colombia's domestic cement consumption is expected to recover in 2021 and beyond returning to the 2015 highs at the end of the forecasting period. This will necessitate a growing net clinker inflows trajectory going forward. By 2025 the industry is expected to have reached net clinker inflows of the order of 600,000 tonnes.

Clinker production forecasts in MT 2020A – 2025F

NB: Net clinker inflows/outflows is the sum of net clinker trading and clinker for exported cement.

Clinker supply-demand balance and trading 2020A – 2025F

Net clinker inflows are projected to increase over the forecasting period to cover increasing domestic demand growth. Despite this and the expected new clinker capacity coming on stream in 2023, the industry will continue to experience clinker utilisation rates around the 90% mark.

This may encourage local players to reinvigorate their investment plans for new clinker capacity to ease the industry's high utilisation rates. Given the nature of the existing clinker manufacturing facilities, a new plant will assume the competitive high ground and thus be able to capture the growth in the market in an efficient way.

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Our websites:

For CemBR Clinker

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For the CGC:

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