

News and events that affect our industry

May 2025



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Week ending: 11-05-2025

SUPPLY:

- **Philippines:** Concreat Holdings Philippines, a majority-owned subsidiary of DMCI Holdings, announced the full operations of the new production line at its Solid Cement plant in Antipolo City. The upgrade raises the plant's capacity from 1.9Mt/yr to 3.4Mt/yr.
- **Uganda:** Lands, Housing and Urban Development minister Judith Nabakooba said that the government and the Naita-A-Tepeth Communal Land Association have finalised a lease agreement to enable Tororo Cement to build Uganda's first clinker plant in Katikekile, Moroto District. No further details are currently available.
- **India:** Nuvoco Vistas will build a 2Mt/yr grinding unit in Kutch as part of its plan to refurbish and put into operation the recently acquired assets of Vadraj Cement. The project adds US\$35m to the US\$141m originally allocated to restart Vadraj's cement assets in Kutch and Surat, bringing the total planned investment to US\$177m, phased over 2025 to 2027. Nuvoco aims to commission the grinding unit and start up the existing Vadraj assets by December 2027. These include a 3.5Mt/yr clinker unit in Kutch, a 6Mt/yr grinding unit in Surat and limestone reserves.
- **India:** UltraTech Cement has increased its production capacity by 1.4Mt/yr through debottlenecking and 'efficiency improvements' at multiple sites across India. It added 0.6Mt/yr of grinding capacity at Nagpur in Maharashtra and 0.8Mt/yr across Panipat and Jhajjar in Haryana. The company's total domestic grey cement capacity now stands at 184.8Mt/yr, while its global capacity has reached 190.2Mt/yr.

- **India:** Wonder Cement inaugurated Line 5 at its Nimbahera plant, raising clinker capacity by 2.8Mt/yr to 13.35Mt/yr and cement capacity by 2.5Mt/yr to 21.5Mt/yr.
- **Sweden:** A court has granted Heidelberg Materials a 30-year licence to continue limestone mining at its Slite quarry on the island of Gotland, securing the future of the plant that produces 75% of Sweden's cement. The court ruling reportedly replaces a 2022 four-year concession and follows a 2021 rejection of a long-term extension that had threatened cement rationing and job losses.

CONSTRUCTION:

- **Kenya:** Construction sector growth -0.7% in 2024, according to the government's 2025 Economic Survey.

IMPORTS/EXPORTS:

- **Kenya:** Clinker imports in 2024 -93% YoY to 10.3Mt, according to the government's 2025 Economic Survey.

DEMAND:

- **Kenya:** Cement production in 2024 -7% YoY to 9.6Mt, consumption -7% YoY to 8.5Mt, according to the government's 2025 Economic Survey.

PRICING:

- **India:** 2024 cement prices -5.6% YoY, according to the Ministry of Commerce and Industry.

OTHER:

- **USA:** The Portland Cement Association has changed its name to the American Cement Association (ACA). This reportedly follows a year-long consultation where the association discussed the rebranding with industry stakeholders. ACA president and CEO Mike Ireland made the announcement at the IEEE-IAS/PCA Cement Conference 2025, which is taking place in Birmingham, Alabama.

Week ending: 18-05-2025

SUPPLY:

- **Iraq:** IVI Holding has signed a US\$240m engineering, procurement and construction contract with Sinoma Overseas to build a new 6000t/day cement plant in Al-Muthanna Province. The project forms part of the Iraqi government's US\$1.17bn industrial programme for Muthanna announced in April 2025.
- **Iraq:** Kurdistan Region prime minister Masrour Barzani has reportedly inaugurated the 6300t/day Dabin cement plant and 52MW power station in Erbil Governorate.
- **Iraq:** Lucky Cement has expanded its clinker production at its joint venture Najmat Al-Samawah plant in Samawah with a new 1.82Mt/yr line. It is also building a 0.65Mt/yr cement grinding plant at the site, due for commissioning in early 2026. These additions will bring Lucky Cement's total consolidated production capacity to 21.48Mt/yr.
- **Bangladesh:** Chhatak Cement's newly completed plant in Sunamganj remains idle due to unresolved gas and limestone supply issues, though progress has been made with a planned subcontracted ropeway from India, positioning the facility to triple its production capacity once operational.

- **Ghana:** Heidelberg Materials and CBI Ghana Ltd have completed and begun operating the world's largest industrial-scale flash calciner for clay, producing over 400Kt/yr of calcined clay to support low-carbon cement production and global decarbonisation efforts.
- **India:** Birla Corp has approved INR8.6bn for a 2.8Mta greenfield cement grinding unit in Gaya, Bihar, to be completed by Q4 FY28-29, while its subsidiary RCCPL plans to invest INR34.75bn in two greenfield grinding units in Uttar Pradesh (3.4Mta total) and a 3.7Mta brownfield clinker unit in Maihar, Madhya Pradesh.
- **Portugal:** Portugal's Cimpor is on schedule to decarbonize and modernize the kiln production line at its Alhandra cement plant, increasing capacity from 3,000 to 3,600 tons per day.

CARBON:

- **Norway:** The first 1000t of CO2 has been captured, liquefied and stored at its Norcem AS Brevik cement plant in Norway, according to Heidelberg Materials. The plant will now continuously ramp up its carbon capture to 0.4Mta.

M&A:

- **Nigeria:** A Lagos court has ruled it has jurisdiction to hear Strategic Consultancy's suit challenging Holcim's sale of an 84% stake in Lafarge Africa to Huaxin Cement, alleging it violated Nigerian laws by bypassing minority shareholders, with proceedings set to continue on 11 June 2025.

DEMAND:

- **Tanzania:** Cement production reached 10.9Mt in 2024 against domestic demand of 8.5Mt/yr, according to Industry and Trade Minister Seleman Jafo.

PRICING:

- **Nigeria:** BUA Group and Dangote Cement have agreed to freeze cement prices for contractors on Nigeria's Renewed Hope infrastructure projects, as part of a government-backed economic support initiative.

Week ending: 25-05-2025

SUPPLY:

- **Cambodia:** Prime minister Hun Manet inaugurated a new US\$250m cement plant in western Cambodia on 20 May 2025. The 2.2Mt/yr facility was jointly funded by Chinese and Cambodian stakeholders and has been built on 407 hectares of land in the Aural district.
- **France:** Ecocem will invest €170m to build four new production lines for its ACT low-carbon cement technology in Fos-sur-Mer and Dunkirk. This follows a €50m investment at Ecocem's Dunkirk facility to deliver its first production line. The additional manufacturing capacity will come online between 2028 and 2030. At full capacity, ACT production in France will reach 1.9Mt/yr.
- **Ethiopia:** Ethiopia has reportedly increased its cement production capacity to 20Mt/yr following the inauguration of Pioneer Cement's expansion project in Dire Dawa city.

- **Iraq:** Najmat Al Samawa Cement (NAS Cement) in Iraq announced this week that its second production line was successfully fired up on 13 May 2025. The new 5500t/day line was formally announced in May 2023. It joins the existing line at the site and should bring the plant's total production capacity to around 3Mt/yr.

CARBON:

- **UK:** The Mineral Products Association (MPA), which represents UK- based producers of cement and lime, has welcomed the UK government's proposal to link the UK and EU Emissions Trading Schemes (ETS). The link was announced as part of a deal to streamline relations between the EU and UK.

DEMAND:

- **USA:** US cement consumption is expected to decline by 1.6 per cent this year, but a recession prompted by ongoing trade wars is not expected in 2025, according to the American Cement Association's (ACA) Market Intelligence team's Spring Forecast.

IMPORTS/EXPORTS:

- **Vietnam:** The government has reduced cement clinker export tax from 10% to 5%, effective from 19 May 2025 to the end of 2026. The 10% rate will be reinstated on 1 January 2027. The Ministry of Finance said the temporary measure is an effort to help local manufacturers adjust production and reduce their inventory amid falling demand.

Week ending: 01-06-2025

SUPPLY:

- **India:** India Cements has successfully completed a de-bottlenecking initiative at its Banswara cement plant in Rajasthan, increasing its production capacity by 0.3Mt/yr. The company's cement manufacturing capacity now stands at 14.75Mt/yr.
- **India:** GoldCrest Cement will build a greenfield integrated plant with a 3.5Mt/yr clinker capacity and 4.5Mt/yr cement capacity, targeting completion by March 2027.
- **Brazil:** Votorantim Cimentos has begun installing a new cement mill at its Salto de Pirapora plant, set to boost capacity by 1Mt/yr as part of a US\$878m expansion to be completed by late 2025.
- **Turkey:** Oyak Cement will convert Mill 3 at its Darica integrated cement plant to a slag grinding unit, according to local press reports.
- **China:** Conch Cement will withdraw 2500t/d of clinker capacity from Longling Conch Cement as part of a capacity replacement plan for a 6166t/d line at Baoshan Conch, with the kiln to be dismantled within a month.

CARBON:

- **Greece:** Holcim has broken ground at the Olympus project at its Milaki plant, which will produce 2Mt/yr of 'near-zero-CO2' cement from 2029. The producer will invest €400m in the development, and it has secured €125m from the EU Innovation Fund. The plant will combine carbon capture technologies.

M&A:

- **Turkey:** Cementir Holding subsidiaries Çimentoş and Alfacem have entered a binding agreement to sell 100% of Kars Çimento to Arkoz Madencilik. Kars owns a 0.6Mt/yr integrated cement plant in northeastern Türkiye. The transaction is valued at €51m and is expected to complete by the end of 2025, subject to regulatory approvals.

IMPORTS/EXPORTS:

- **Ukraine:** The Interdepartmental Commission on International Trade has reportedly extended anti-dumping duties on cement from Russia, Belarus and Moldova until 2030. The duties stand at 115% for Russian cement, 94% for Moldovan cement and 57% for Belarusian cement, following a review of measures first imposed in 2019.

PRICING:

- **Ghana:** Cement manufacturers failed to meet a 23 May 2025 deadline to report ex-factory prices as required by law, prompting the CMDC to consider sanctions in an emergency meeting.
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