

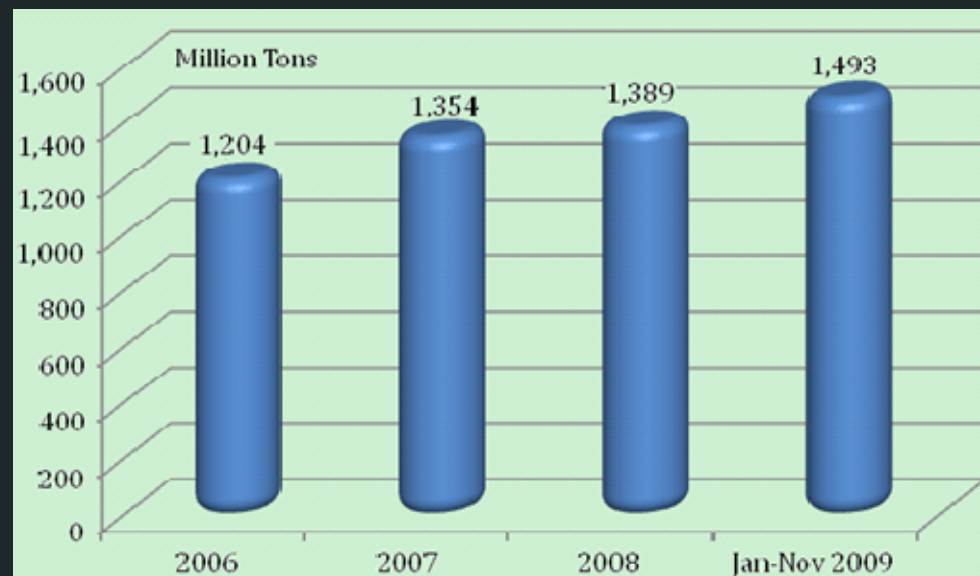
## China Cement Industry Report, 2009



Since 1985, China's cement output has ranked first in the world for consecutive 20 years, with the fastest growth rate. In addition, China's new dry-process cement also develops most rapidly around the globe. In 2008, China's cement production capacity reached 1.87 billion tons, including 1.1 billion tons of new dry-process cement, 270 million tons of special cement and grinding, and about 500 million tons of backward production capacity; in the same year, the cement output approximated 1.4 billion tons.

China's cement production areas mainly concentrate in eastern, southern and central regions, which take 66% shares; North China and Southwest China occupy 12% and 11% respectively; northeast and northwest regions have 11% totally.

### China's Cement Output, 2006-Nov 2009



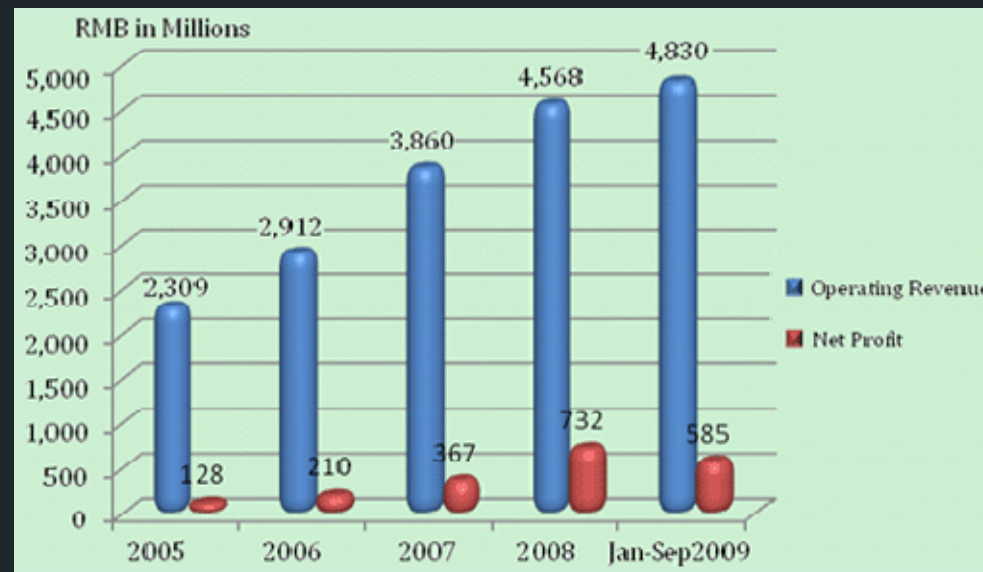
Source: ResearchInChina

China cement industry has been impacted by the international financial crisis to a certain extent. In the first half of 2009, China's RMB4 trillion investment promoted the domestic cement demand. In 2009, 418 cement production lines are under construction, with the capacity of 620 million tons; 147 lines have been approved to be set up, with the capacity 210 million tons. When 418 lines get completed, the cement production capacity will reach 2.7 billion tons, yet the market demand will be only 1.6 billion tons. In this sense, the future cement production capacity will be oversupplied in China, and enterprises will face increasingly fierce competition.

In 2009, to prevent excess capacity, China has intensified its macro-control on the cement industry. It is expected the development of China cement industry will slow down somewhat in 2010. However, China cement industry still maintains the growth trend in 2009. Jidong Cement expands capacity quickly.

As one of 12 major cement groups supported by national policies, Jidong Cement boasts of more than 60 enterprises with the total assets of nearly RMB23.5 billion. As of the end of 2009, it has 60 million tons of cement production capacity annually. Jidong Cement has increased its investment in northwest regions and expanded production herein, so that its output and sales volume increase simultaneously.

### Revenue of Jidong Cement, 2005-Sep 2009



Source: Jidong Cement; ResearchInChina

This report analyzes the development of China cement industry, market trends, the latest trends of cement application and key cement enterprises, and probes into the future development direction of China cement industry.

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