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| 4. Environment & Recycling | (82)-2-538-8232 | ods291@cement.or.kr |

Fax (82)-2-538-1720

Homepage www.cement.or.kr

2018 CEMENT IN KOREA

The power to sustain the world

It is Cement

**Korean cement companies are
creating a new construction culture.**

SAMPYO
Cement

S
SsangYong Cement

HANIL HYUNDAI CEMENT
HANIL CEMENT

asia
asia
HALLA
CEMENT

SUNGSHIN

HCT

Union

KOREA CEMENT ASSOCIATION



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KCA Member companies

Sampyo Cement. Co., Ltd.

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SsangYong Cement Ind. Co., Ltd.

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Hanil Cement Co., Ltd.

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Hanil Hyundai Cement Co., Ltd.

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Asia Cement Co., Ltd.

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Sungshin Cement Co., Ltd.

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Halla Cement Co., Ltd.

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Hankook Cement & Textile Co., Ltd.

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Union Corporation.

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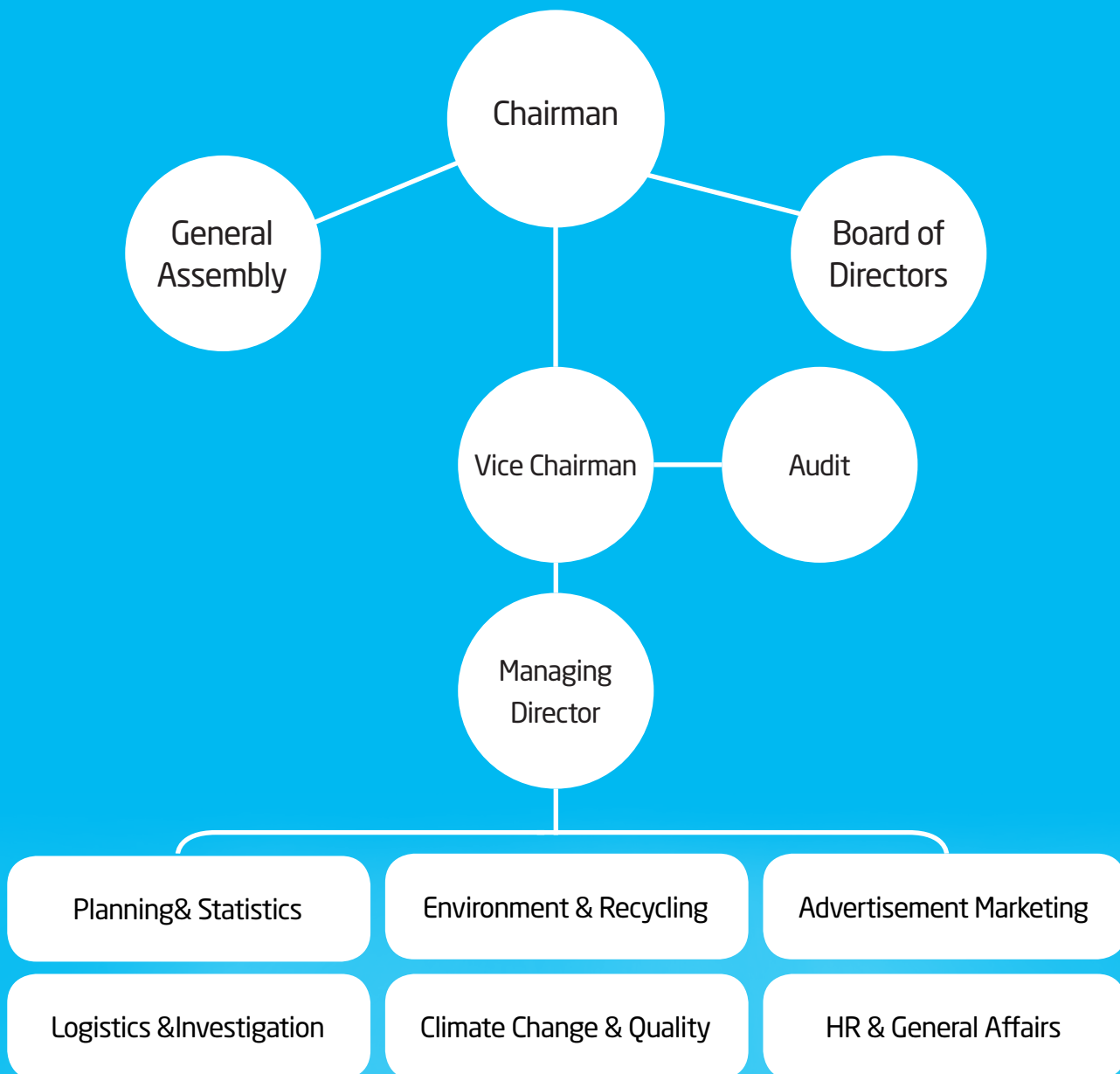
KCA Activities

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About Korea Cement Association



History

- July 1st 1963, established under Civil Code Section 32

Purpose of Establishment

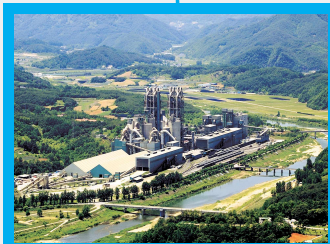
- Promoting welfare of member companies and continuous development of cement industry
- Contribution to national economic development

Major Business

- Strengthen cooperation with administrative authorities for cement industry
- Research on the development of cement industry
- Business to promote the interests of cement industry
- Project to improve technology and global Competitiveness
- Business commissioned by the government for development of cement industry
- Statistics on cement industry

Summary of Cement Industry

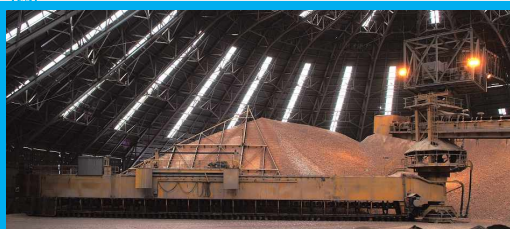
Scale of Cement Industry



No. of Companies 9
No. of Mill Plants 26



No. of Kiln Plants(kiln) 11(46)
kiln Capacity (1,000t) 61,474



Cement Production (1,000t) 52,093
Domestic Consumption (1,000t) 51,273



Cement Clinker Export (1,000t) 5,444



No. of Distribution Terminals(Silos) 79(165)
Terminal Capacity (1,000t) 1,110



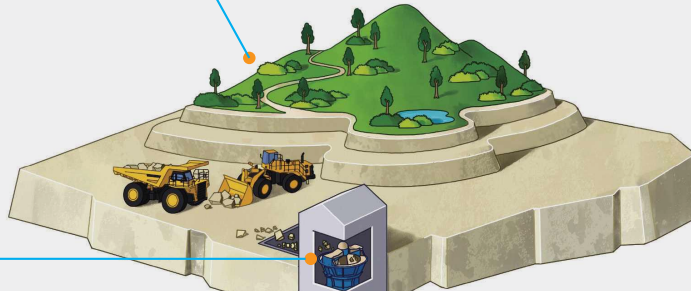
No. of Employees 5,506

Production Process

Portland Cement Production Process

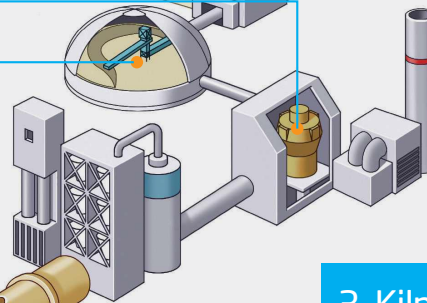
1. Limestone mine

Mining and crushing process



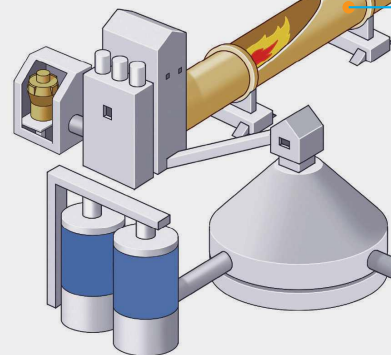
2. Crusher and mixer

Raw material crushing and mixing process



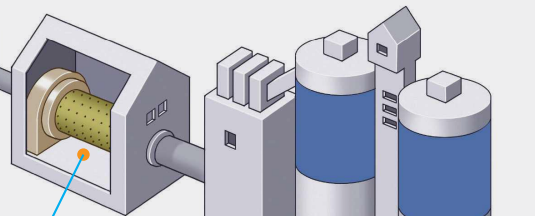
3. Kiln

Raw material baking process



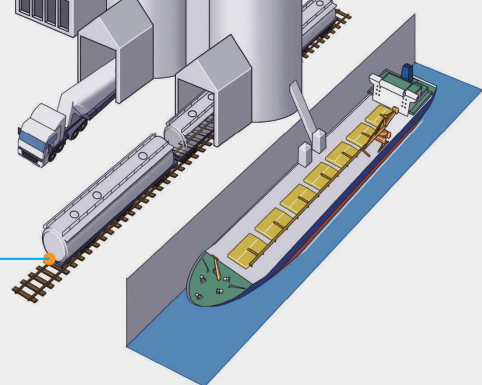
4. Cement mill

Cement Grinding Process



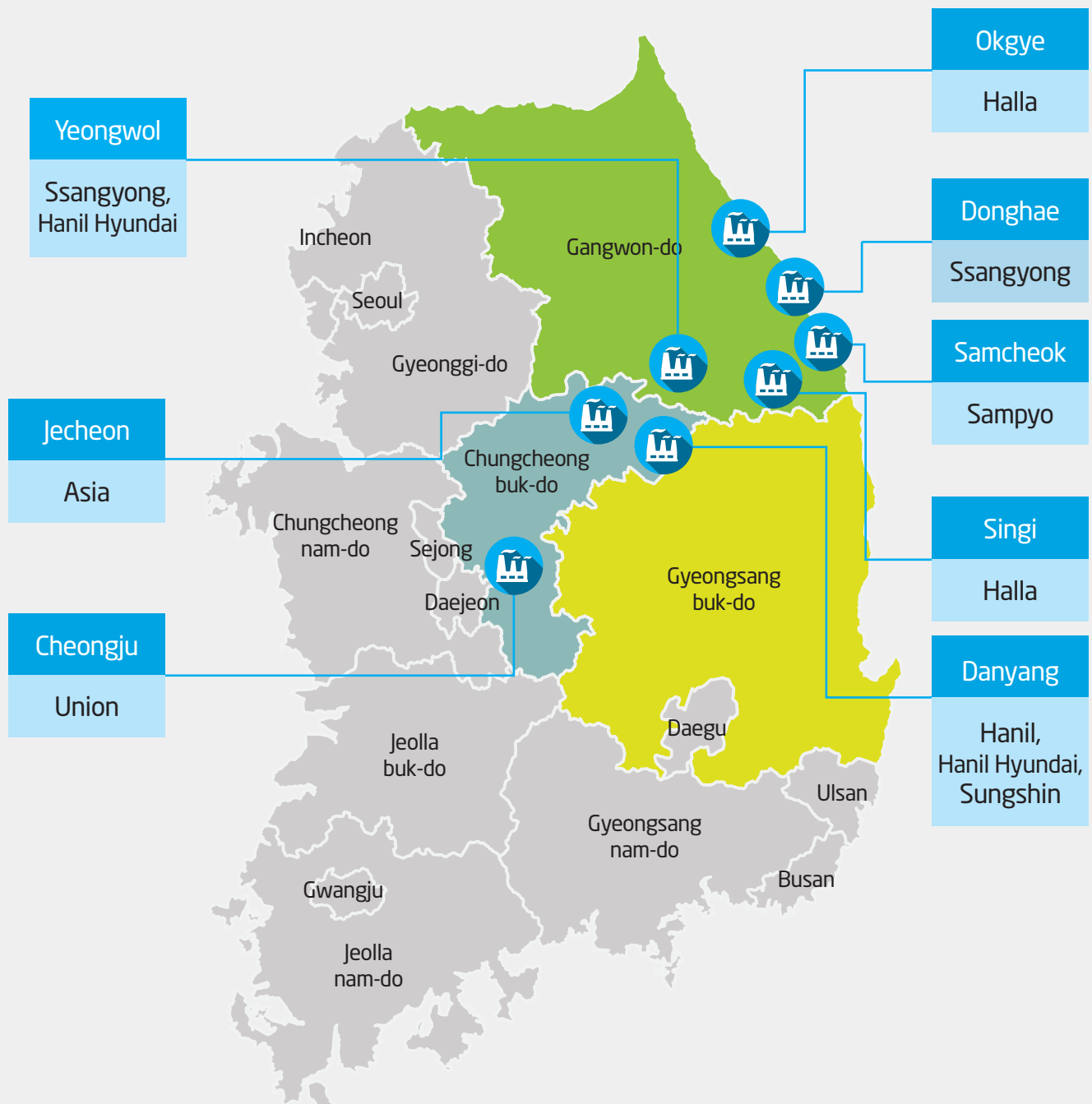
5. Cement Shipment

Transportation of ship, freight car, trailer



Map of Cement Production Plant

Location of Kiln Plants



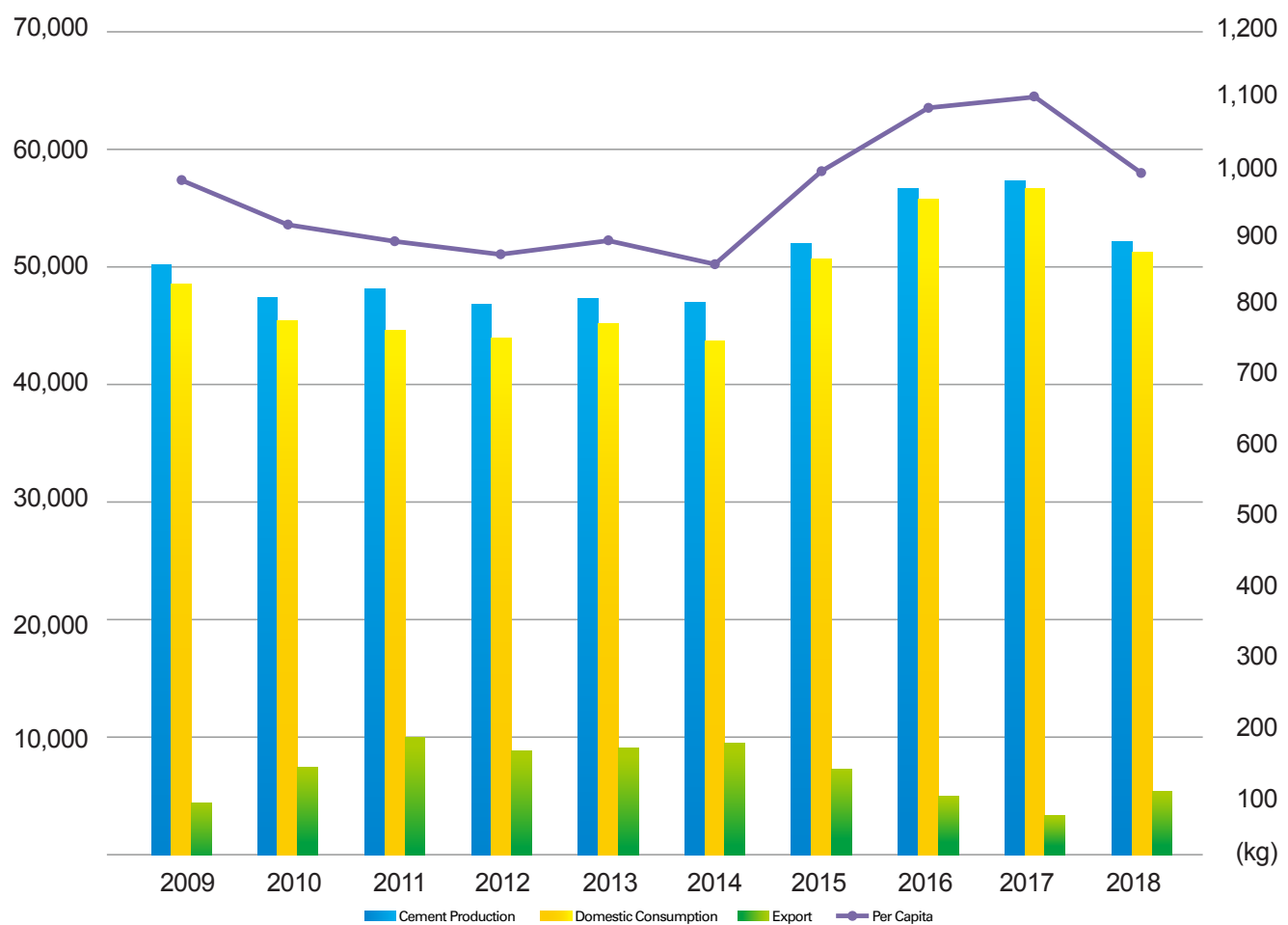
Supply & Demeand

Production & Sales & Consumption

(1,000 T)

Year	Cement Production		Sales						Import		Domestic Consumption		Per Capita (kg)
		%	Domestic	%	Export	%	Total	%		%		%	
2009	50,126	97.0	47,639	97.9	4,572	70.3	52,211	94.7	831	41.9	48,470	95.7	983
2010	47,420	94.6	44,721	93.9	7,524	164.6	52,245	100.1	772	92.9	45,493	93.9	918
2011	48,249	101.7	43,918	98.2	9,965	132.4	53,883	103.1	683	88.5	44,601	98.0	893
2012	46,862	97.1	43,211	98.4	8,883	89.1	52,093	96.7	730	106.9	43,939	98.5	875
2013	47,291	100.9	44,413	102.8	9,049	101.9	53,462	102.6	798	109.3	45,174	102.8	896
2014	47,048	99.5	42,825	96.4	9,525	105.3	52,334	97.9	897	112.4	43,707	96.8	861
2015	52,044	110.6	49,579	115.8	7,348	77.1	56,927	108.8	1,158	129.1	50,737	116.1	995
2016	56,742	108.6	54,605	110.1	5,043	68.6	59,648	104.8	1,213	104.7	55,756	109.9	1,088
2017	57,400	101.6	55,857	102.3	3,389	67.2	59,246	99.3	891	73.5	56,711	101.7	1,102
2018	52,093	90.8	50,575	90.5	5,444	160.6	56,019	94.6	662	74.3	51,237	90.3	993

Export and Import Include Clinker



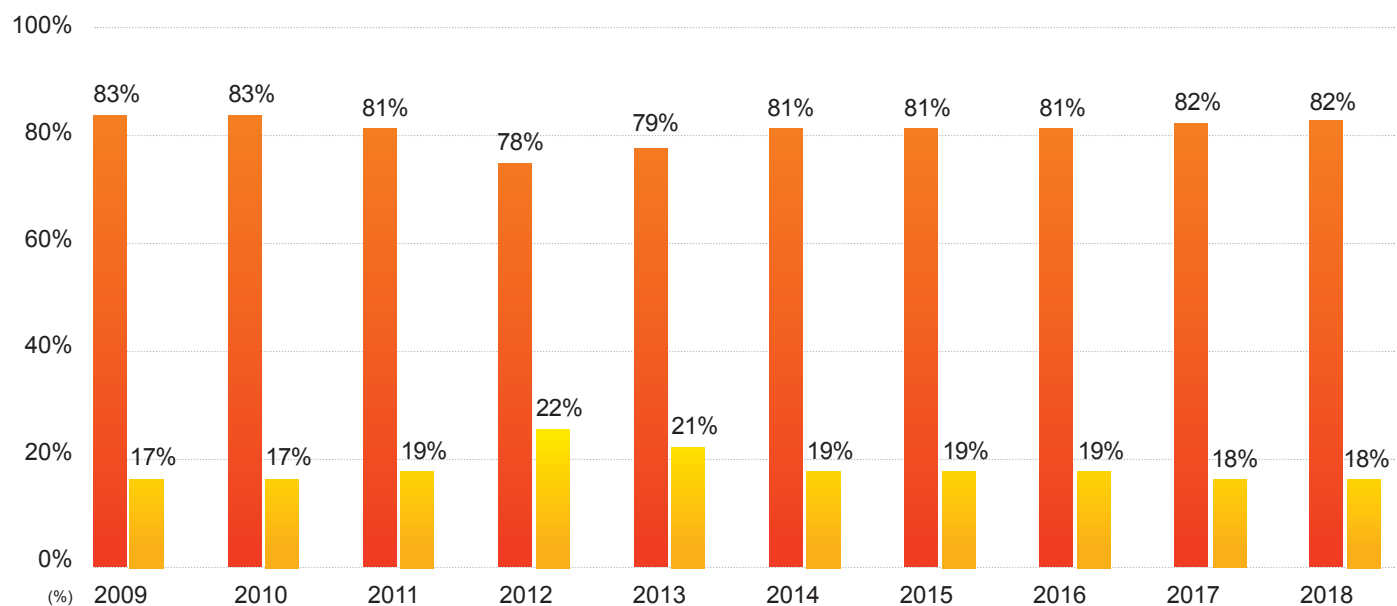
Cement Production

Production by Cement Product

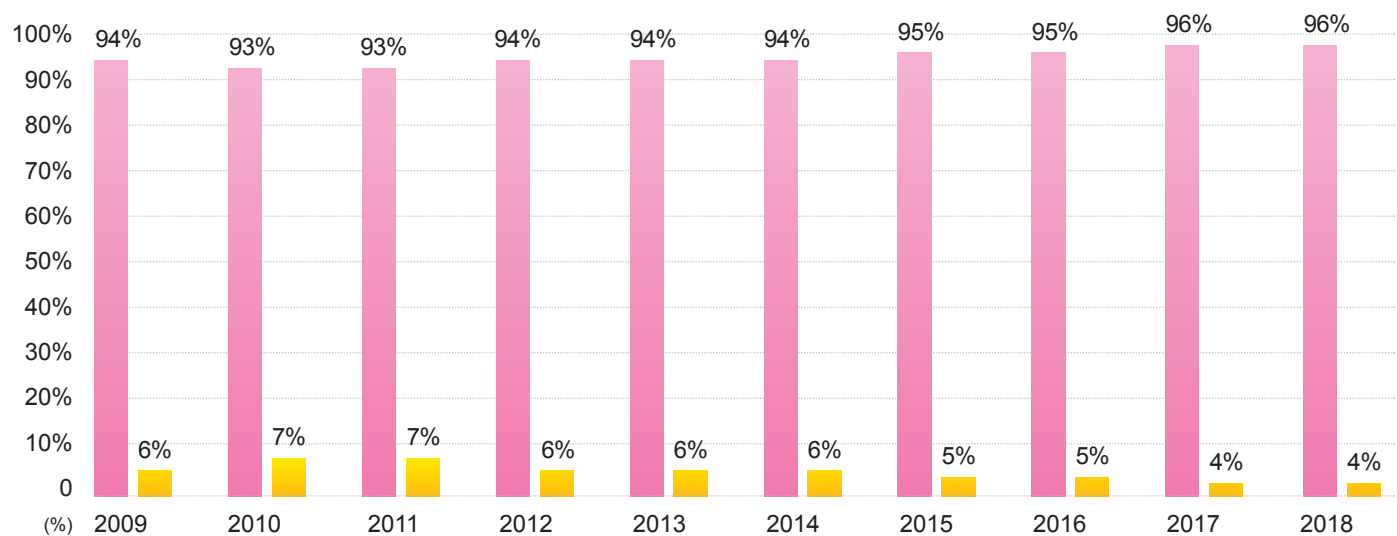
(1,000 T)

TYPE	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Portland Cement	41,386	39,321	38,977	36,603	37,391	38,129	42,294	45,887	46,570	42,702
Blended Cement	8,740	8,099	9,272	10,259	9,900	8,919	9,750	10,620	10,830	9,391
TOTAL	50,126	47,420	48,249	46,862	47,291	47,048	52,044	56,507	57,400	52,093

Portland Cement Blended Cement



Bulk Cement Bag Cement

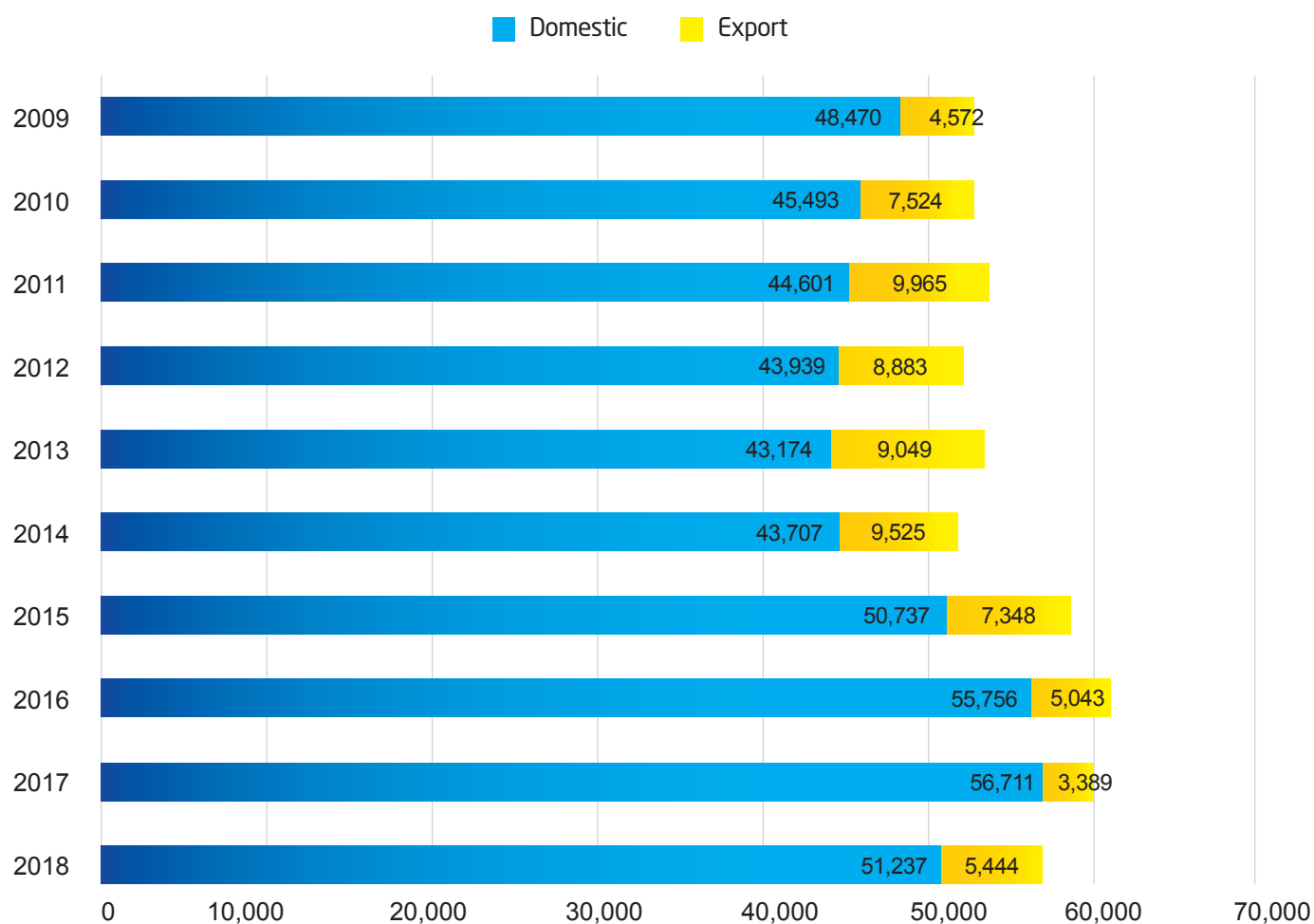


Cement Sales

Sale of the Companies

(1,000 T)

Year	Sampyo	Ssangyong	Hanil	Hanil Hyundai	Asia	Sungshin	Halla	Hankook	Others	TOTAL
2009	7,923	13,611	5,730	4,939	3,086	6,249	7,094	1,466	2,944	53,042
2010	8,245	13,847	6,372	4,459	3,255	5,764	7,178	1,122	2,775	51,017
2011	9,422	14,386	5,912	4,364	3,072	5,131	7,708	1,402	3,169	54,566
2012	9,087	13,428	5,699	4,428	3,000	5,923	6,476	1,520	3,261	52,822
2013	8,910	13,671	5,986	4,526	3,107	6,003	6,578	1,560	3,881	54,222
2014	8,301	13,370	5,941	4,371	3,191	5,775	7,250	1,508	3,525	53,232
2015	8,156	14,076	6,256	4,936	3,712	7,694	7,094	1,851	4,310	58,085
2016	9,088	14,045	7,140	5,287	4,039	7,795	7,125	1,686	4,593	60,798
2017	9,706	13,472	6,943	4,773	4,190	7,171	7,781	1,949	4,114	60,099
2018	8,700	13,597	6,336	4,846	3,593	7,256	7,178	1,582	3,592	56,681



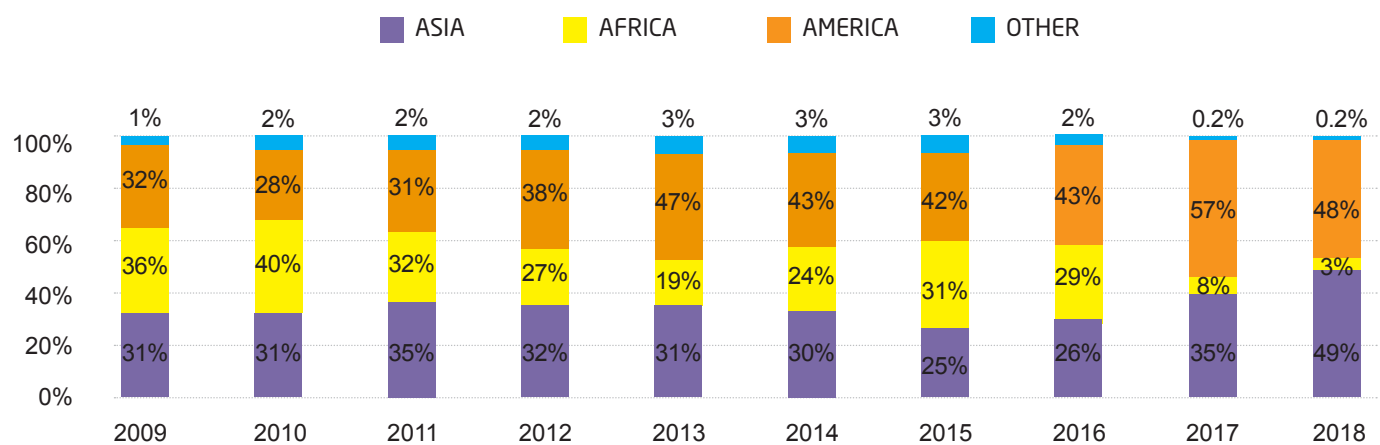
Export & Import

Export

(1,000 T)

CONTINENT	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
ASIA	1,401	2,305	3,454	2,824	2,828	2,819	1,817	1,329	1,195	2,678
AFRICA	1,665	2,983	3,224	2,383	1,702	2,285	2,261	1,460	263	159
AMERICA	1,445	2,077	3,045	3,411	4,209	4,139	3,068	2,176	1,924	2,596
OTHER	61	159	242	265	310	282	202	78	7	11
TOTAL	4,572	7,524	9,965	8,883	9,049	9,525	7,348	5,043	3,389	5,444

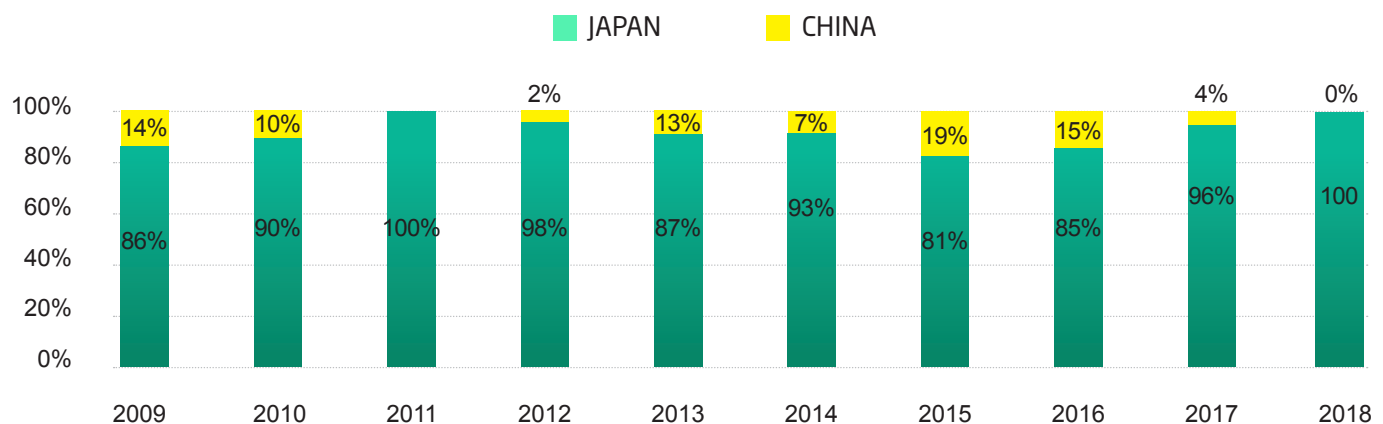
Export Include Clinker



(1,000 T)

CONTINENT	YEAR COUNTRY	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
ASIA	JAPAN	711	692	684	719	697	837	942	1,030	871	662
	CHINA	120	80	2	11	101	60	216	183	20	
TOTAL		831	772	686	730	798	897	1,158	1,213	891	662

Import Include Clinker



Transportation

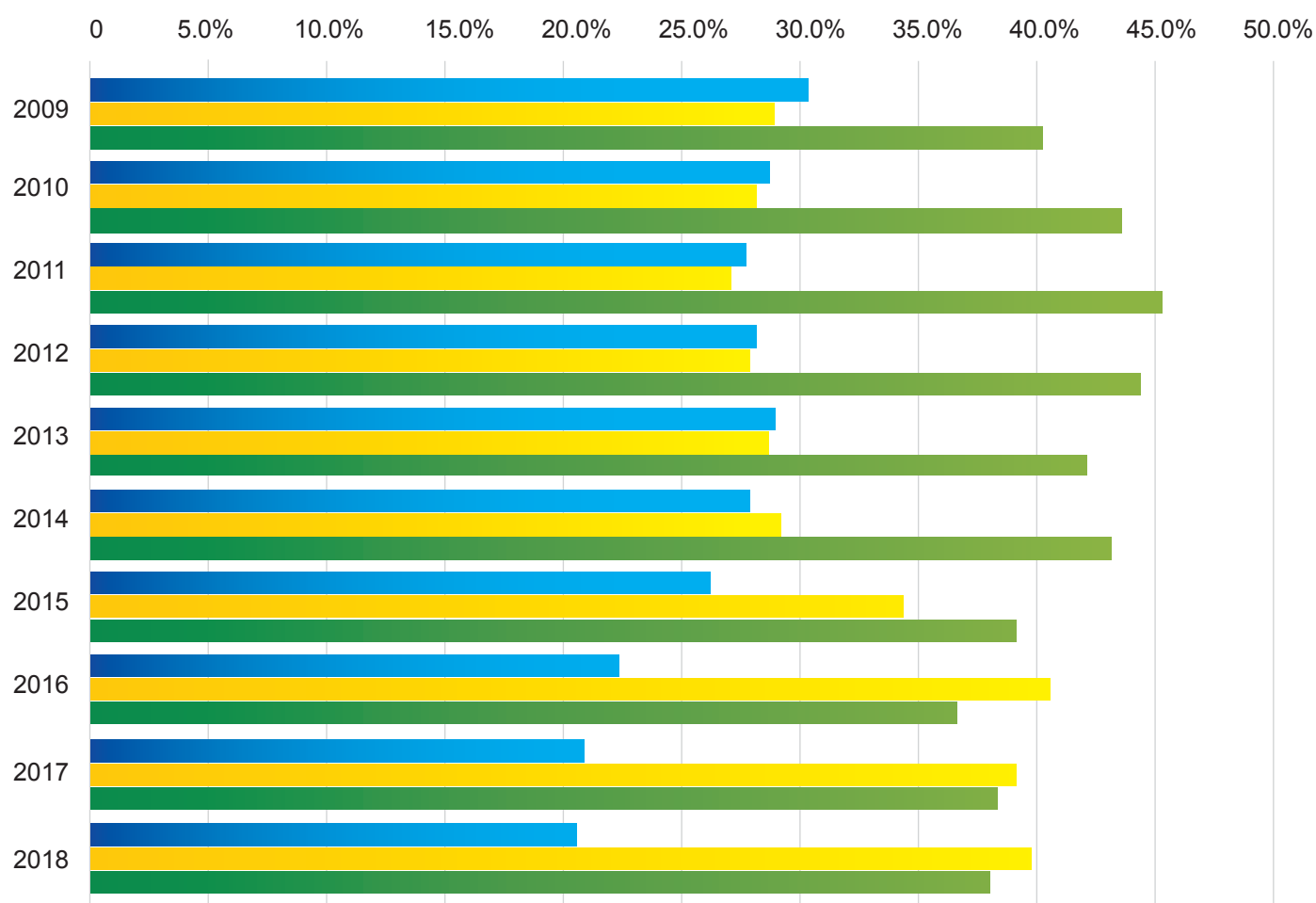
Proportion of Transportation By Type

(1,000 T)

YEAR	TRAIN		TRUCK		VESSEL		TOTAL
		%		%		%	
2009	15,807	31.0	14,616	28.7	20,587	40.4	51,010
2010	14,596	28.8	14,240	28.1	21,766	43.0	50,602
2011	14,487	27.9	13,809	26.6	23,596	45.5	51,892
2012	14,409	28.6	13,672	27.1	22,282	44.2	50,363
2013	14,754	28.9	14,534	28.5	21,726	42.6	51,014
2014	14,039	27.5	14,788	28.9	22,268	43.6	51,095
2015	14,747	26.8	18,968	34.5	21,344	38.8	55,059
2016	13,474	23.4	23,159	40.2	20,964	36.4	57,597
2017	13,238	22.9	22,564	39.1	21,910	38.0	57,712
2018	12,346	22.5	21,758	39.7	20,705	37.8	54,809

Include Export

■ VESSEL ■ TRUCK ■ TRAIN



KCA Member Companies



Sampyo Cement. Co., Ltd

Strive to be the **Best**



Head Office	Tongyanggil 20, Samcheok-si, Gangwon-do (25930)		
Contact	Tel: 82-33-571-7000	Homepage	http://www.sampyocement.co.kr
Establishment	June 15, 1957	Assets	1,111(billion won)

Production Facility

Clinker Capacity(1,000t)	10,045/year	Kiln Plant	1(Dry Type)
Cement Capacity(t)	33,100/day	Mill Plant	5

Production Product

Cement Product	Ordinary portland cement / Moderate heat cement High early strength cement / Low-heat cement. Sulfate resisting cement / Slag cement
Other Product	Dry mortar(For wall plastering) / Dry mortar(For masonry wall) Dry mortar(For Floor Plaster) / Dry mortar(For tile)

* Product Inquiry : Overseas Marketing Team(TEL: 82-2-6261-4303 / E-mail : hyunjung.chun@sampyo.co.kr)

KCA Member Companies



SsangYong Cement Ind. Co., Ltd

We always think of **humankind's future**



Head Office	Citycentertower, 34, Soopyo-ro, Jung-gu, Seoul (04555)		
Contact	Tel: 82-2-2270-5114	Homepage	http://www.ssangyongcement.co.kr
Establishment	May 14, 1962	Assets	2,967(billion won)

Production Facility

Clinker Capacity(1,000t)	14,758/year	Kiln Plant	3(Dry Type)
Cement Capacity(t)	43,220/day	Mill Plant	5

Production Product

Cement Product	Ordinary portland cement / Moderate heat cement High early strength cement / Low-heat cement. Sulfate resisting cement / Slag cement / Ternary blended cement Ultra super early strength cement Super high-early strength cement Micro-cement / Geocrete / Non-crack cement
Other Product	Non-shrinkage mortar(Plus) / Non-shrinkage mortar(Basic) Non-shrinkage mortar(SR) / Non-shrinkage mortar(AD) Resistance acid mortar / Expansion agent (CSA)

* Product Inquiry : Overseas Marketing Team(TEL: 82-2-2270-5072 / E-mail : justko@ssyc.co.kr)

KCA Member Companies



HANIL CEMENT

Hanil Cement Co., Ltd.

Beyond the best for All



Head Office	Udeok Bldg., 330, Gangnam-daero, Gangnam-gu, Seoul (06252)		
Contact	Tel:82-2-531-7000	Homepage	http://www.hanilcement.com
Establishment	December 28, 1961	Assets	2,757(billion won)

Production Facility

Clinker Capacity(1,000t)	7,131/year	Kiln Plant	1(Dry)
Cement Capacity(t)	26,700/day	Mill Plant	3

Production Product

Cement Product	Ordinary portland cement / Slag cement Special & Pre-Mixed Cement
Other Product	Dry mortar(For plastering) / Dry mortar(For masonry) Dry mortar(For Floor screed) / Dry mortar(For tile) Dry mortar(For maintenance & reinforcement) Dry mortar(For grout) / Ready Mixed Concret / Slag Powder

* Product Inquiry : Cement Sales Team(TEL: 82-2-531-7268 / E-mail : changgw@hanil.com)

KCA Member Companies

 **HANIL HYUNDAI CEMENT** Hanil Hyundai Cement Co., Ltd.

Challenge for All



Head Office	Udeok Bldg., 330, Gangnam-daero, Gangnam-gu, Seoul (06252)		
Contact	Tel:82-2-520-2114	Homepage	http://www.hanilhdcement.co.kr
Establishment	September 15, 1963	Assets	549(billion won)

Production Facility

Clinker Capacity(1,000t)	6,864/year	Kiln Plants	2(Dry Type)
Cement Capacity(t)	24,624/day	Mill Plant	3

Production Product

Cement Product	Ordinary portland cement / Moderate heat cement High early strength cement / Low-heat cement. Sulfate resisting cement / Slag cement
Other Product	Slag Powder

* Product Inquiry : Sales Team(TEL: 82-2-520-2106 / E-mail : lupeo87@hanil.com)

KCA Member Companies



Asia Cement Co., Ltd.

For Human, For Nature
New Thinking, New Asia



Head Office	Asia Tower Bldg., 430, Nonhyeon-ro, Gangnam-gu, Seoul (06223)		
Contact	Tel:82-33-571-7000	Homepage	http://www.asiacement.co.kr
Establishment	April 15, 1963	Assets	1,161(billion won)

Production Facility

Clinker Capacity(1,000t)	4,146/year	Kiln Plants	1(Dry Type)
Cement Capacity(t)	12,000/day	Mill Plant	2

Production Product

Cement Product	Ordinary portland cement / Moderate heat cement High early strength cement / Low-heat cement. Sulfate resisting cement / Slag cement / Super Low-heat cement Super high-early strength cement / Geocrete Foamed concrete cement
Other Product	Dry mortar(For wall plastering) / Dry mortar(For masonry wall) Dry mortar(For Floor Plaster) / Dry mortar(For tile) Dry mortar(For grout) / Dry mortar(For reinforcement)

* Product Inquiry : Sales Team(82-2-527-6687,6612/ parkih@asiacement.co.kr, yeedj@asiacement.co.kr)

KCA Member Companies

SUNGSHIN

Sungshin Cement Co., Ltd.

Quality Innovation



Head Office	Taehwa Bldg., 29, Insadong 5-gil, Jongno-gu, Seoul (03162)		
Contact	Tel:82-2-3782-7000	Homepage	http://www.sungshincement.co.kr
Establishment	March 16, 1967	Assets	975(billion won)

Production facility

Clinker Capacity(1,000t)	9,686/year	Kiln Plant	1(Dry Type)
Cement Capacity(t)	30,000/day	Mill Plant	2

Production Product

Cement Product	Ordinary portland cement / Moderate heat cement High early strength cement / Low-heat cement Sulfate resisting cement / Slag cement
Other Product	Ordinary concrete / Light weight concrete Concrete for pavement / High strength concrete Anti washout underwater concrete

* Product Inquiry : Overseas Export Team(82-2-3782-1112/ pjs0507@sscem.com)

KCA Member Companies



Halla Cement Co., Ltd.

VALUE CREATOR



Head Office	225, San-gye-ri, Okgye-myeon, Gangneung-si, Gangwon-do (210-834)		
Contact	Tel:82-33-534-1000	Homepage	http://www.hallacement.co.kr
Establishment	January 27, 1978	Assets	972(billion won)

Production Facility

Clinker Capacity(1,000t)	8,184/year	Kiln Plant	2(Dry Type)
Cement Capacity(t)	37,575/day	Mill Plant	5

Production Product

Cement Product	<p>Ordinary portland cement</p> <p>High early strength cement / Blast-furnace slag cement</p> <p>SUPERMENT PRO (High early strength)</p> <p>CEM PRO & CEM FILE (For steam curing concrete)</p> <p>CEM PILL PRO (For grouting & soil stabilization)</p> <p>CEM LOW HEAT (For mass concrete)</p> <p>CEM WATERLOCK (For less shrinkage & crack)</p> <p>CEM FERRO (For sludge solidification)</p>
Other Product	CEM PHALT (Mortar for pavement)

* Product Inquiry : Procurement & Export Team(82-2-6902-3229/ seunggyu.kang@hallacement.co.kr)

KCA Member Companies



Hankook Cement & Textile Co., Ltd.

Head Office	239, Mudeung-ro, Buk-gu, Gwangju (61228)		
Contact	Tel:82-62-519-1600	Homepage	http://www.hcnt.co.kr
Establishment	February 18, 1976	Assets	183(billion won)

Production Facility

Cement Capacity(t)	8,000/day	Mill Plant	1
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Production Product

Cement Product	Other Product
Slag cement / Low-heat mixed cement	Slag powder

* Product Inquiry : Business Support Team(82-54-271-3332/ sunhyuk@hcnt.co.kr)

KCA Member Companies



Union Corporation

Head Office	13F OCI Bldg., 94, Sogong-ro, Jung-gu (04532)		
Contact	Tel:82-2-757-3801	Homepage	http://www.unioncement.com
Establishment	January 11, 1964	Assets	306(billion won)

Production Facility

Clinker Capacity(1,000t)	145/year	Kiln Plant	1
Cement Capacity(t)	550/day	Mill Plant	1

* white cement

Production Product

Cement Product	White portland cement / Alumina cement Calcium aluminate cement / Unizet cement
Other Product	DRY MORTAR / ALC MORTAR POWER FLEX / UNIFIX / SUPERCRETE

* Product Inquiry : Global Business Team(82- 02-3455-8788/union@unioncement.com)

KCA Activities

1. The 2018 Korea Environmental Awards



KCA contributed to the establishment of a national resource circulation society through recycling of waste materials in the cement industry. In recognition of this achievement, KCA was awarded with the grand prize in the category of "Resource Circulation" for "2018 Korea Environment Award". Through this conferment, KCA was awarded for three consecutive years since 2016.

2. The 6th Resource Circulation Promotion Forum



KCA and the Wonju Regional Environment Office jointly held The 6th Cement Industry "Resource Circulation Promotion Forum". Some cases of cooperation between the cement manufacturers and local governments and waste recycling in advanced countries were presented and the promotion of recycling of waste materials in the industry was discussed at the Forum this year.

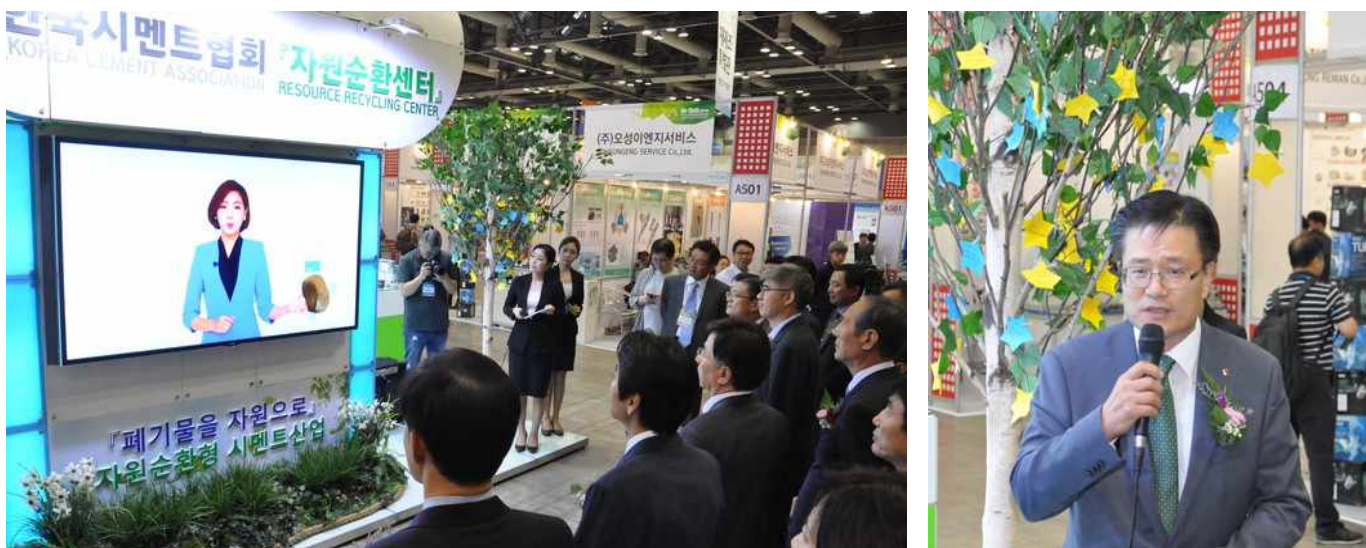
KCA Activities

3. The 55th Anniversary Ceremony&45th Cement Symposium



KCA held the 55th anniversary of the establishment and the 45th Cement Symposium. The cement symposium announces research results in various fields such as cement production technology, quality improvement and energy saving. The event takes place annually to enhance the competitiveness of cement industry by sharing advanced technology.

4. The RE-TECH 2018



KCA participated in the RE-TECH 2018 to promote the results of recycling resources in the cement industry. KCA installed "Resource Circulation Center" booth and played the circulation of resource recycling video of the cement industry and distributed the leaflets to the visitors.