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KEY ECONOMIC INDICATORS-PHILIPPINES, 2003

POPULATION (Million)	: 81.78
PER CAPITA GDP	: P52,392.52
ANNUAL GDP (P'000)	: 4,299
ANNUAL GDP GROWTH RATE	: 4.5%
CONSTRUCTION SECTOR GDP	: P325,545
GROWTH IN CONSTRUCTION SECTOR	: 1.7%
INFLATION RATE	: 3%

KEY DATA OF CEMENT INDUSTRY, 2003

NUMBER OF MANUFACTURERS	: 16
NUMBER OF KILNS	: 43
ANNUAL CAPACITY OF KILNS	: 21.922 Million Tonnes
ANNUAL CAPACITY OF MILLS	: 26.782 Million Tonnes
TOTAL CLINKER PRODUCTION	: 12.503 Million Tonnes
TOTAL CEMENT PRODUCTION	: 13.067 Million Tonnes
TOTAL DOMESTIC CEMENT SALES (By Manufacturers Only)	: 12.110 Million Tonnes
CLINKER IMPORTS	: 79 Thousand Tonnes
CLINKER EXPORTS	: 675 Thousand Tonnes
CEMENT IMPORTS	
1) By Manufacturers	: None
2) By Traders	: 10 Thousand Tonnes
CEMENT EXPORTS	: 980 Thousand Tonnes
AVERAGE EX-PLANT PORTLAND CEMENT PRICE (Ending Dec.' 02)	: P2,725.00 per Tonne : P109.00 per 40-Kg. Bag
PER CAPITA CEMENT CONSUMPTION	: 149.6kgs.

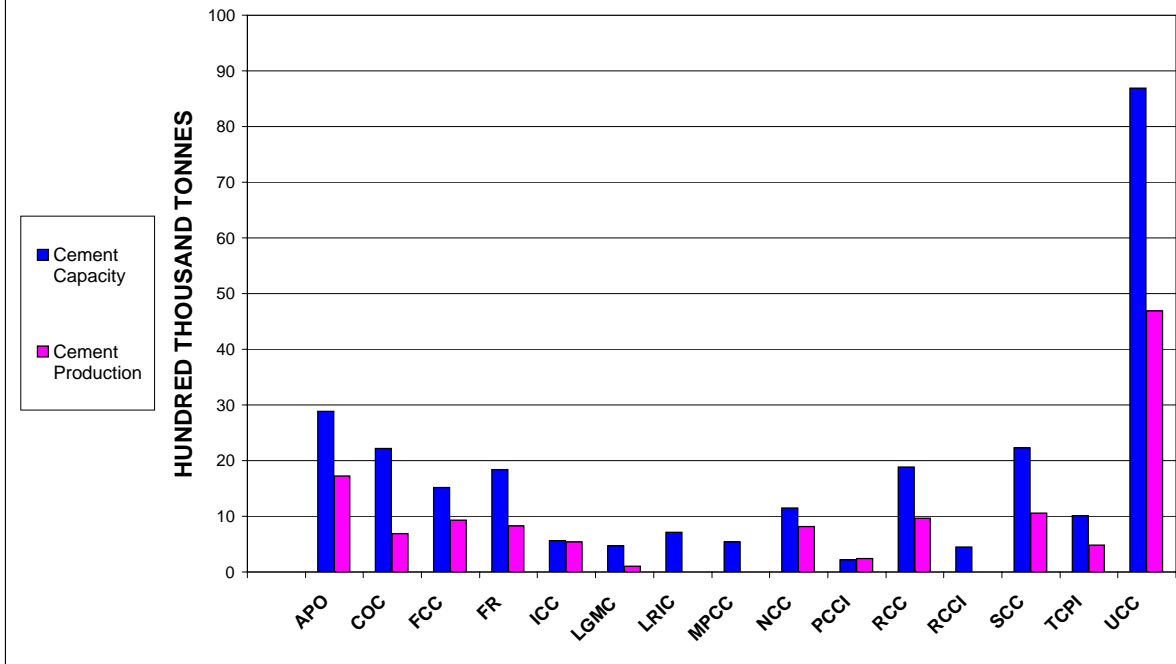
**INSTALLED CAPACITIES OF CEMENT PLANTS
BY COMPANY, 2003**

(Unit: '000 Tonnes)

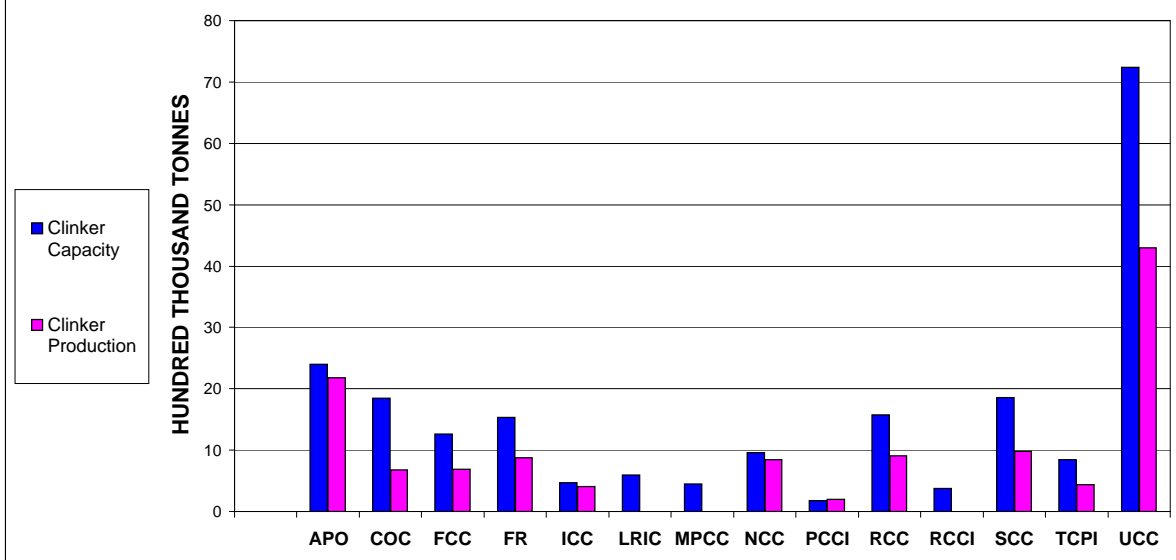
COMPANY		KILNS		TYPE OF PROCESS	ANNUAL CAPACITY		
		NO.	AGE		CLINKER		CEMENT
1. APO CEMENT CORPORATION	(APO)	1	32	Dry	750		
		<u>1</u> 2	3	Dry	<u>1,650</u>	2,400	2,880
2. CONTINENTAL OPERATING CORPORATION	(COC)						
a) Norzagaray, Bulacan		1	28	Dry	480		
		<u>1</u> 2	3	Dry	<u>990</u>	1,470	1,764
b) Tanay, Rizal			32	Wet		378	454
		1					
3. FORTUNE CEMENT CORPORATION	(FCC)	1	3	Dry	900		
		<u>1</u> 2	30	Dry	<u>360</u>	1,260	1,512
4. FR CEMENT CORPORATION	(FR)	1	4	Dry	990		
		1	37	Semi-Dry	87		
		1	37	Semi-Dry	93		
		<u>1</u> 4	36	Semi-Dry	<u>360</u>	1,530	1,836
5. GOODFOUND CEMENT CORPORATION *	(GCC)	1	2	Dry		350	420
6. TAIHEIYO CEMENT PHILIPPINES, INC.	(TCPI)	1	2	Dry		840	1,008
7. ILIGAN CEMENT CORPORATION	(ICC)	1	31	Dry		465	558
8. LIMAY GRINDING MILL CORPORATION	(LGMC)	-	-	-			475
9. LLOYDS RICHFIELD INDUSTRIAL CORPORATION	(LRIC)	1	42	Semi-Dry	127.5		
		1	36	Semi-Dry	127.5		
		<u>1</u> 3	31	Wet	<u>336</u>	591	709
10. MINDANAO PORTLAND CEMENT CORPORATION	(MPCC)	1	40	Dry		450	540
11. NORTHERN CEMENT CORPORATION	(NCC)	1	31	Dry	480		
		<u>1</u> 2	31	Dry	<u>480</u>	<u>960</u>	1,152
12. PACIFIC CEMENT COMPANY, INC.	(PCCI)	1	37	Dry		180	216
13. REPUBLIC CEMENT CORPORATION	(RCC)	1	41	Dry	127.5		
		1	38	Dry	127.5		
		1	34	Dry	330		
		<u>1</u> 4	4	Dry	<u>990</u>	1,575	1,890
14. RIZAL CEMENT COMPANY, INC.	(RCCI)	1	47	Wet	114		
		1	43	Wet	111		
		<u>1</u> 3	37	Wet	<u>150</u>	375	450
15. SOLID CEMENT CORPORATION	(SCC)	1	8	Dry	990		
		1	32	Wet	435		
		<u>1</u> 3	35	Wet	<u>435</u>	1,860	2,232
16. UNION CEMENT CORPORATION	(UCC)						
La Union Plant		1	8	Dry	720		
		1	38	Wet	93		
		1	40	Wet	93		
		<u>1</u> 4	44	Wet	<u>114</u>	1,020	1,224
Bulacan Plant (San Ildefonso)		1	32	Semi-Dry		234	281
(Norzagaray)		1	35	Dry	810		
		<u>1</u> 2	5	Dry	<u>1,650</u>	2,460	2,952
Davao Plant		1	18	Dry	533		
		1	5	Dry	1,050		
		<u>1</u> 3	33	Wet	<u>159</u>	1,742	2,091
Lugait Plant (Alsons)	(ACC)	1	31	Dry	582		
		<u>1</u> 2	3	Dry	<u>1,200</u>	1,782	2,138
TOTAL		43				21,922	26,782

* Non-member

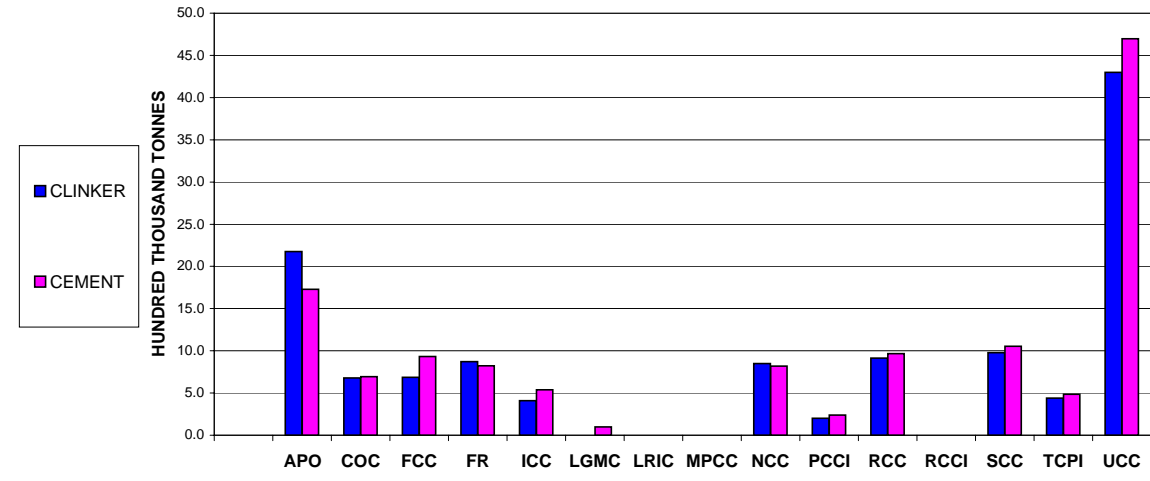
**CEMENT PRODUCTION VS. CEMENT CAPACITY BY COMPANY
YEAR 2003**



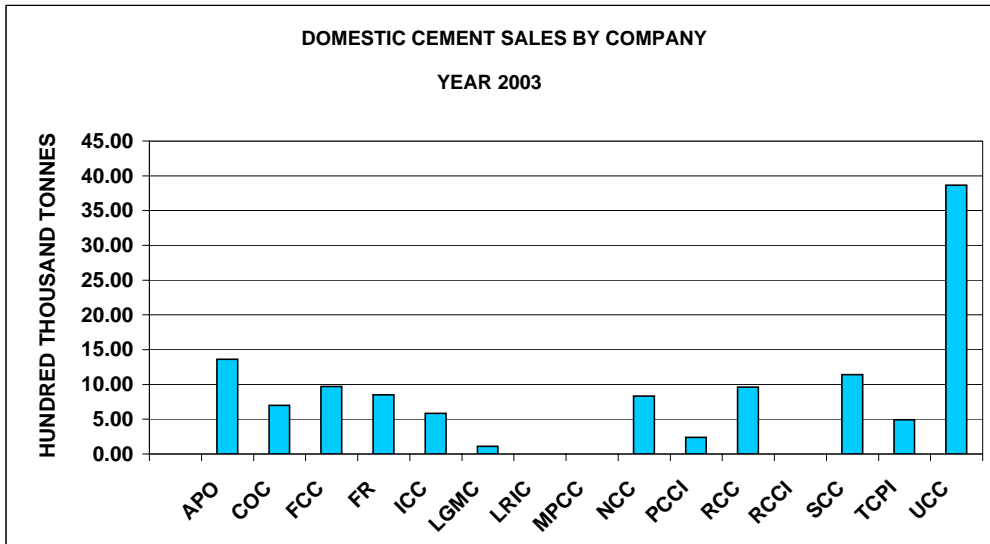
**CLINKER PRODUCTION VS. CLINKER CAPACITY BY COMPANY
YEAR 2003**

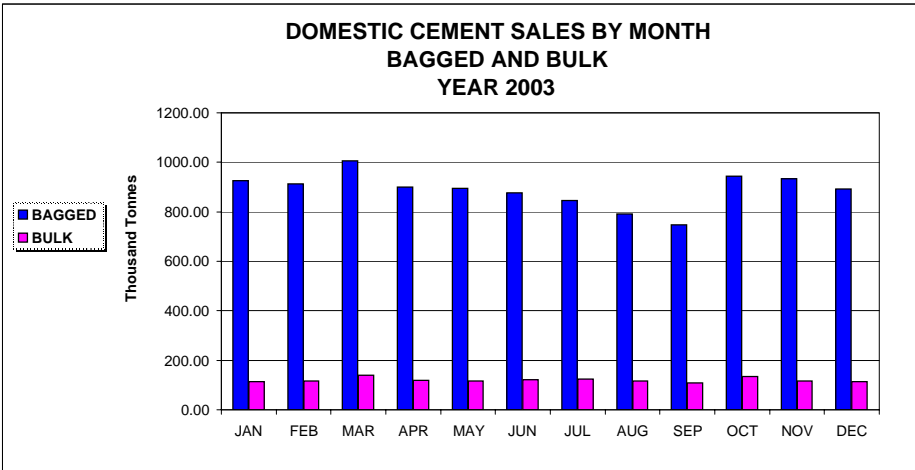


**CLINKER AND CEMENT PRODUCTION BY COMPANY
YEAR 2003**



**DOMESTIC CEMENT SALES BY COMPANY
YEAR 2003**



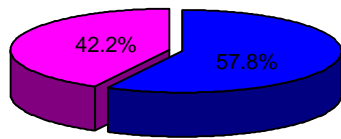


IMPORTS AND EXPORTS

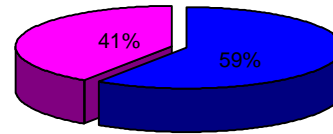
Unit: (In Metric Tonnes)

CEMENT IMPORTS		CLINKER IMPORTS	
Country of Origin	Quantity	Country of Origin	Quantity
1. Japan	9,700	1. Indonesia	23,002
		2. China	27,777
		3. Malaysia	28,296
Total	9,700	Total	79,075
CEMENT EXPORTS		CLINKER EXPORTS	
Country of Destination	Quantity	Country of Destination	Quantity
1. Hongkong	9,700	1. Bangladesh	376,044
2. Nigeria	174,928	2. Malaysia	22,595
3. Palau	10,578	3. Conakry	42,035
4. Saipan	128	4. Vietnam	234,001
5. Haiti	37,763		
6. Taiwan	134,031		
7. Lagos	69,736		
8. Guam	1,309		
9. Shri Lanka	15,003		
10. Majuro	77		
11. Marshall Islands	52		
12. Cambodia	21,543		
13. Conakry	33,060		
14. Africa	15,000		
15. Madagascar	21,953		
16. Mauritius	190,772		
17. Hawaii	244,800		
	980,433	Total	674,675

PRODUCTION BY AREA (2003)



SALES BY AREA (2003)



■ Luzon
■ Visayas & Mindanao

**CEMENT
PRODUCTION/SALES BY AREA**

(Unit: Thousand Tonnes)

Area \ Year		Year										
		1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
LUZON	PROD.	5,517	6,358	7,063	8,169	9,705	7,937	6,958	6,167	5,723	7,372	7,552
	SALES	5,520	6,362	7,067	8,076	9,796	7,799	7,757	6,639	6,252	7,469	7,766
VISAYAS & MINDANAO	PROD.	2,444	3,213	3,491	4,260	4,976	4,951	5,599	5,792	5,655	6,025	5,515
	SALES	2,488	3,234	3,542	4,197	4,740	5,001	4,803	5,182	5,093	5,829	5,324
TOTAL	PROD.	7,961	9,571	10,554	12,429	14,681	12,888	12,557	11,959	11,378	13,397	13,067
	SALES	8,008	9,596	10,609	12,273	14,536	12,800	12,560	11,821	11,345	13,298	13,090

Note: Sales = Domestic sales + Exports

CEMENT SALES BY TYPE

(Unit: Thousand Tonnes)

YEAR	PORTLAND CEMENT (TYPE-1)	PERCENT (%)	BLENDED CEMENT (TYPE-P)	PERCENT (%)	TOTAL	PERCENT (%)
1993	6,001	75	2,007	25	8,008	100
1994	7,384	77	2,212	23	9,596	100
1995	7,704	73	2,905	27	10,609	100
1996	9,276	76	2,997	24	12,273	100
1997	11,708	81	2,828	19	14,536	100
1998	10,609	83	2,191	17	12,800	100
1999	11,014	88	1,546	12	12,560	100
2000	10,618	90	1,203	10	11,821	100
2001	10,437	92	908	8	11,345	100
2002	12,009	90	1,289	10	13,298	100
2003	11,079	85	2,011	15	13,090	100

CEMENT EXPORTS BY DESTINATION

(Unit: Thousand Tonnes)

DESTINATION		1983	1984	1985	1986	1987	1998	1999	2000	2001	2002	2003
REGION	COUNTRY											
A S I A	BANGLADESH	12	108	235	74	27	-	45	-	29	-	-
	BRUNEI	-	-	-	-	-	-	-	-	-	-	-
	CAMBODIA	-	-	-	-	-	-	1	13	24	31	21
	CHINA	-	9	112	30	-	-	-	-	-	-	-
	HONGKONG	-	-	20	-	-	-	125	209	127	152	10
	INDONESIA	72	19	-	-	-	-	-	74	100	111	-
	MALAYSIA	-	-	-	-	-	-	-	-	-	-	-
	SHRI LANKA	-	-	-	-	-	-	-	-	-	-	15
	SINGAPORE	23	-	-	-	-	-	415	132	130	27	-
	TAIWAN	-	-	-	-	-	-	-	588	830	123	134
	THAILAND	-	-	-	-	-	-	-	-	-	-	-
VIETNAM	-	-	-	1	12	-	-	-	-	-	-	
TOTAL		107	136	367	105	39	0	586	1016	1240	444	180
O T H E R S	AFRICA	-	-	-	-	-	-	-	-	-	-	15
	CONAKRY	-	-	-	-	-	-	-	-	-	-	33
	DOM. REP.	-	-	-	-	-	-	-	-	-	17	-
	GUAM	-	-	-	-	-	-	-	-	-	-	1
	HAITI	-	-	-	-	-	-	-	-	-	-	38
	INDIA	15	-	-	-	-	-	-	-	-	-	-
	LAGOS	-	-	-	-	-	-	-	-	-	-	70
	MADAGASCAR	-	-	-	-	-	-	-	-	-	-	22
	MAURITIUS	-	-	-	-	-	-	-	-	-	28	191
	MIDDLE EAST	-	-	-	-	-	-	36	-	-	-	-
	NEPAL	8	5	20	-	-	-	-	-	-	-	-
	NIGERIA	-	-	-	-	-	83	66	165	215	176	175
	PALAU	-	-	1	-	-	3	3	1	8	144	10
	USA	-	-	-	-	-	-	-	161	380	226	245
YEMEN	-	-	-	-	-	-	-	-	21	-	-	
TOTAL		23	5	21	0	0	86	105	327	624	591	800
GRAND TOTAL		130	141	388	105	39	86	691	1343	1864	1035	980
BULK BAGGED		-	-	-	-	-	86	691	1,343	1,258	846	954
		130	141	388	105	39	-	-	-	606	189	26

Remarks: There were no exports from 1988 to 1997.

CEMENT IMPORTS BY ORIGIN
1993-2003

(Unit: Thousand Tonnes)

ORIGIN	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
INDONESIA	-	5	-	10	-	-	-	369	1,260	144	-
CHINA	-	-	149	306	292	88	32	5	5	-	-
HONGKONG	-	-	-	54	17	-	9	-	-	-	-
INDIA	-	-	-	-	-	-	-	-	-	-	-
IRAQ	-	-	-	-	-	-	-	-	-	-	-
JAPAN	-	10	98	6	33	81	185	303	306	162	10
JORDAN	-	-	-	-	-	-	-	-	-	-	-
KOREA	-	-	5	7	-	11	-	-	-	-	-
MALAYSIA	-	-	-	23	-	-	-	-	-	-	-
MEXICO	-	-	226	210	-	-	-	-	-	-	-
SINGAPORE	-	-	-	0.240	-	-	-	-	-	-	-
TAIWAN	-	-	2	52	10	-	248	902	662	-	-
THAILAND	-	-	-	-	-	-	-	-	-	32	-
TURKEY	-	-	-	12	-	-	-	-	-	-	-
TOTAL	0	15	480	680	352	180	474	1,579	2,233	338	10

PHILIPPINE CEMENT INDUSTRY, 1993 - 2003

Unit: Thousand Tonnes

YEAR	CAPACITY		PRODUCTION				DOMESTIC SALES *		IMPORTS				EXPORTS			
	CLINKER	CEMENT	CLINKER		CEMENT				CLINKER		CEMENT		CLINKER		CEMENT	
	QTY.	QTY.	QTY.	%	QTY.	%	QTY.	%	QTY.	%	QTY.	%	QTY.	%	QTY.	%
1993	8,364	9,200	6,217	18.14	7,961	19.40	8,003	21.18	554	-4.31	-	-100.00	0	0.00	0	0.00
1994	9,955	10,950	7,885	26.82	9,571	20.22	9,596	19.90	435	-21.48	10	0	0	0.00	0	0.00
1995	10,268	11,295	8,800	11.60	10,554	10.27	10,609	10.55	525	20.68	480	4700.00	0	0.00	0	0.00
1996	12,818	14,100	9,642	9.56	12,429	17.76	12,273	15.68	1,250	138.09	680	41.66	0	0.00	0	0.00
1997	16,673	18,340	11,566	19.95	14,681	18.11	14,536	18.43	1,267	1.36	352	-48.23	0	0.00	0	0.00
1998	21,368	25,642	11,101	-4.02	12,888	-12.21	12,714	-12.53	239	-81.13	180	-48.86	0	0.00	86	0.00
1999	21,968	26,362	10,492	-5.48	12,558	-2.56	11,869	-6.64	311	30.12	474	163.33	0	0.00	691	703.48
2000	22,318	26,782	11,160	6.36	11,959	-4.76	10,478	-11.71	0	-100.00	1,579	233.12	0	0.00	1,343	94.35
2001	21,922	26,782	10,394	-6.86	11,378	-4.85	9,481	-9.51	103	0.00	2,233	41.41	0	0.00	1,864	38.79
2002	21,922	26,782	12,620	21.41	13,397	17.74	12,263	29.34	307	198.05	338	-84.86	264	0.00	1,035	-44.47
2003	21,922	26,782	12,503	-0.92	13,067	-2.46	12,110	-1.24	79	-74.26	10	-97.04	675	155.68	980	-5.31

Notes: (*) Sales by Cement Manufacturers only
(%) Percentage change

**CEMENT CONSUMPTION, CONSTRUCTION GROWTH RATE,
POPULATION AND CEMENT PER CAPITA CONSUMPTION
1993 - 2003**

YEAR	CEMENT CONSUMPTION (In Million M.T.)	CONST. GROWTH (%)	POPULATION (Millions)	PER CAPITA CONSUMPTION (Kgs.)
1993	8.003	5.7	65.08	122.9
1994	9.606	8.9	66.61	144.2
1995	11.089	6.5	68.17	162.6
1996	12.953	10.9	70.23	184.4
1997	14.888	16.2	71.89	208.2
1998	12.894	-8.1	73.59	176.3
1999	12.344	-2.1	75.32	163.8
2000	12.057	-6.0	76.50	157.6
2001	11.714	0.5	77.90	150.3
2002	12.601	0.3	79.50	158.5
2003	12.120	1.7	81.78	149.6

2003 ASEAN CEMENT INDUSTRY IN BRIEF

(Excluding White Cement)

Quantity in Thousand Tonnes

	INDONESIA	MALAYSIA	PHILIPPINES	SINGAPORE	THAILAND	VIETNAM	BRUNEI
CLINKER PRODUCTION CAPACITY	44,425	17,800	21,922	0	46,830	14,920	0
CEMENT GRINDING CAPACITY	47,490	28,300	26,782	8,300	54,805	24,120	550
CLINKER PRODUCTION	33,248	15,225	12,503	0	30,807	13,400	0
CEMENT PRODUCTION	30,720	17,176	13,067	300	28,833	23,700	231
CEMENT DOMESTIC DEMAND	27,528	15,241	12,120	3,600	23,454	105,879	236
AVERAGE DOMESTIC PRICES (Bagged Cement Delivered per Ton)	Rp.540,000	RM 186	3,125.00	S\$ 85	2,900 Baht	Rotary Kiln VND 750,000 Vertical Kiln VND 630,000	BND 128
YEAR-END EXCHANGE RATE (per US \$1.00)	8,500.00	3.80	55.56	1.70	39.54	15,500.00	1.80

Source: ASEAN Federation of Cement Manufacturers (AFCM)

**CEMENT MANUFACTURERS' ASSOCIATION OF THE PHILIPPINES
DIRECTORY OF CEMENT COMPANIES**

1. APO CEMENT CORPORATION

Office Address:

24th Floor, Petron Mega Plaza Building
358 Senator Gil Puyat Avenue, Makati City
Tel: 849-3600; 849-3700
Fax: 849-3619/3679

Plant Address:

Tina-an, Naga, Cebu
Tel: 032-273-3300
Fax: 032-273-9339

2. CONTINENTAL CEMENT CORPORATION

Office Address:

18th Floor, PBCom Tower
6795 Ayala Avenue, corner Herrera St.,
Makati City
Tel: 819-5506 to 15; 8195523 to 26; 28 & 30
Fax: 815-2582; 2668; 2682; 2678

Plant Address:

Barrio Bigte, Norzagaray, Bulacan
Tel: 759-7952 to 59; 719-3840
Fax: 759-7950 to 51

Barrio Balimbing, Tanay, Rizal
Tel: 0912-328-3659
Fax: 0912-328-3659

3. FORTUNE CEMENT CORPORATION

Office Address:

18th Floor, PBCom Tower
6795 Ayala Avenue, corner Herrera St.,
Makati City
Tel: 819-5506 to 15; 8195523 to 26; 28 & 30
Fax: 815-2582; 2668; 2682; 2678

Plant Address:

Mapulo, Taysan, Batangas
Tel: 063-719-3840
Fax: 0912-306-5224

4. FR CEMENT CORPORATION

Office Address:

18th Floor, PBCom Tower
6795 Ayala Avenue, corner Herrera St.,
Makati City
Tel: 819-5506 to 15; 8195523 to 26; 28 & 30
Fax: 815-2582; 2668; 2682; 2678

Plant Address:

Barangay Dalumbayan,
Teresa, Rizal
Tel: 650-6640; 644-8826 to 30
Fax: 650-5171

5. GOODFOUND CEMENT CORPORATION *

Plant Address:

Camalig, Albay

6. TAIHEIYO CEMENT PHILIPPINES, INC.

Office Address:

6TH Flor, Insular Life Building,
Gorordo Avenue, Cebu City
Tel: 032-231-5333
Fax: 032-231-4825

Plant Address:

South Poblacion,
San Fernando, Cebu City
Tel: 032-231-5333
Fax: 032-231-4825; 254-5242

* Non-member

7. **ILIGAN CEMENT CORPORATION**

Office Address:

18th Floor, PBCom Tower
6795 Ayala Avenue, corner Herrera St.,
Makati City
Tel: 819-5506 to 15; 8195523 to 26; 28 & 30
Fax: 815-2582; 2668; 2682; 2678

Plant Address:

Barrio Kiwalan, Iligan City
Tel: 063-225-7501; 2257712
Fax: 063-225-7201

8. **LIMAY GRINDING MILL CORPORATION**

Office Address:

Unit 2011, Herrera Tower
Herrera St., corner Valero St.,
Salcedo Village, Makati City
Tel: 753-2559 to 61/753-4961 to 62
Fax: 845-1955

Plant Address:

PPI Compound
Limay, Bataan
Tel: 047-244-5929 to 31
Fax: 047-244-5928

9. **LLOYDS RICHFIELD INDUSTRIAL CORPORATION**

Office Address:

18th Floor, PBCom Tower
6795 Ayala Avenue, corner Herrera St.,
Makati City
Tel: 819-5506 to 15; 8195523 to 26; 28 & 30
Fax: 815-2582; 2668; 2682; 2678

Plant Address:

Dungo-an, Danao
Cebue City
Tel: 032-200-3810 to 13
Fax: 032-200-3811

10. **MINDANAO PORTLAND CEMENT CORPORATION**

Office Address:

18th Floor, PBCom Tower
6795 Ayala Avenue, corner Herrera St.,
Makati City
Tel: 819-5506 to 15; 8195523 to 26; 28 & 30
Fax: 815-2582; 2668; 2682; 2678

Plant Address:

Barrio Kiwalan, Iligan City
Tel: 063-519050
Fax: 063-225-1349

11. **NORTHERN CEMENT CORPORATION**

Office Address:

5th Floor ECJ Building, Real corner
Arsobispo St., Intramuros, Manila
Tel: 527-8281; 527-1924
Fax: 527-3931

Plant Address:

Barrio Labayug,
Sison, Pangasinan
Tel: 0912-308-3189
Fax: 0912-312-2770

12. **PACIFIC CEMENT COMPANY, INC.**

Office Address:

29TH Floor, Chatham House Condominium
116 Valero corner Herrera St.,
Salcedo Village, Makati City

Plant Address:

Km. 11, Surigao City
Tel: 086-826-1418
Fax: 086-826-1432

13. **REPUBLIC CEMENT CORPORATION**

Office Address:

18th Floor, PBCom Tower
6795 Ayala Avenue, corner Herrera St.,
Makati City
Tel: 819-5506 to 15; 8195523 to 26; 28 & 30
Fax: 815-2582; 2668; 2682; 2678

Plant Address:

Barrio Minuyan,
Norzagaray, Bulacan
Tel: 0912-334-0291
Fax: 0912-353-2599

14. **RIZAL CEMENT COMPANY, INC.**

Office Address:

24th Floor, Petron Mega Plaza Building
358 Senator Gil Puyat Avenue, Makati City
Tel: 849-3600; 849-3700
Fax: 849-3619/3679

Plant Address:

Binangonan, Rizal
Tel: 652-0114
Fax: 652-0115

15. SOLID CEMENT CORPORATION

Office Address:

24th Floor, Petron Mega Plaza Building
358 Senator Gil Puyat Avenue, Makati City
Tel: 849-3600; 849-3700
Fax: 849-3619/3679

Plant Address:

Barrio Tagbac,
Antipolo, Rizal
Tel: 650-2691 & 98
Fax: 650-4145; 650-0562

16. UNION CEMENT CORPORATION

Office Address:

The Phinma Plaza

39 Plaza Drive, Rockwell Center
Makati City
Tel: 870-0100
Fax: 870-0510
Tel: 898-1980 to 90
Fax: 898-1768 to 69

Plant Address:

La Union Plant:

Barrio Quirion, Bacnotan, La Union
Tel: 072-888-4252
Fax: 072-888-5671

Bulacan Plant:

Barrio Matictic, Norzagaray, Bulacan
Tel: 892-8060 to 62
Fax: 892-8059

Davao Plant:

Barrio Ilang, Davao City
Tel: 082-238-0451 to 54
Fax: 082-238-0309

Lugait Plant - (formerly ALSONS CEMENT):

Barrio Salimbal, Luga-it
Misamis Oriental
Tel: 063-225-8000
Fax: 063-225-8002/8241