

KEY ECONOMIC INDICATORS-PHILIPPINES, 2004

POPULATION (Million)	: 82.66
PER CAPITA GDP	: P57,496 M
ANNUAL GDP (P'000)	: P4,843,450 B
ANNUAL GDP GROWTH RATE	: 4.5%
CONSTRUCTION SECTOR GDP	: P377,121 M
GROWTH IN CONSTRUCTION SECTOR	: 15.8%
INFLATION RATE	: 5.7%

KEY DATA OF CEMENT INDUSTRY, 2004

NUMBER OF MANUFACTURERS	: 19
NUMBER OF KILNS	: 43
ANNUAL CAPACITY OF KILNS	: 21.922 Million Tonnes
ANNUAL CAPACITY OF MILLS	: 26.782 Million Tonnes
TOTAL CLINKER PRODUCTION	: 13.056 Million Tonnes
TOTAL CEMENT PRODUCTION	: 13.057 Million Tonnes
TOTAL DOMESTIC CEMENT SALES (By Manufacturers Only)	: 12.171 Million Tonnes
CLINKER IMPORTS	: 0 Thousand Tonnes
CLINKER EXPORTS	: 703 Thousand Tonnes
CEMENT IMPORTS	
1) By Manufacturers	: None
2) By Traders	: 13 Thousand Tonnes
CEMENT EXPORTS	: 820 Thousand Tonnes
AVERAGE EX-PLANT PORTLAND CEMENT PRICE (Ending Dec.' 04)	: P3,350.00 per Tonne : P134.00 per 40-Kg. Bag
PER CAPITA CEMENT CONSUMPTION	: 146.98kgs.

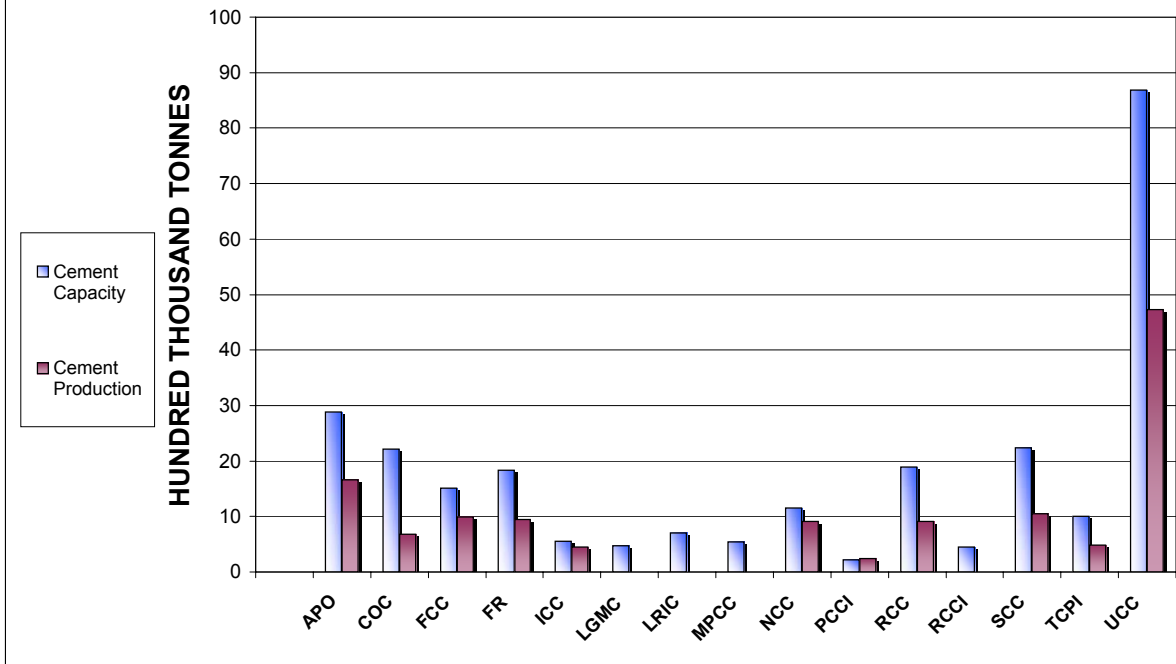
INSTALLED CAPACITIES OF CEMENT PLANTS

(Unit: '000 Tonnes)

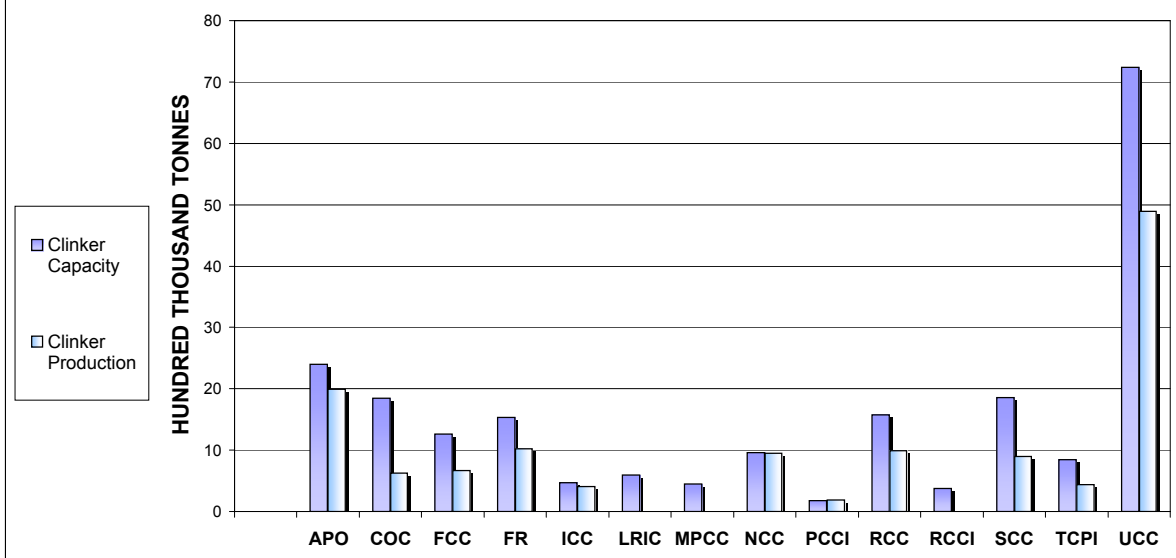
COMPANY		KILNS		TYPE OF PROCESS	ANNUAL CAPACITY			
		NO.	AGE		CLINKER		CEMENT	
1. APO CEMENT CORPORATION	(APO)	1	34	Dry	750			
		<u>1</u>	2	5	Dry	<u>1,650</u>	2,400	2,880
2. CONTINENTAL OPERATING CORPORATION	(COC)							
a) Norzagaray, Bulacan		1	30	Dry	480			
		<u>1</u>	2	5	Dry	<u>990</u>	1,470	1,764
b) Tanay, Rizal			1	34	Wet		378	454
3. FORTUNE CEMENT CORPORATION	(FCC)	1	5	Dry	900			
		<u>1</u>	2	32	Dry	<u>360</u>	1,260	1,512
4. FR CEMENT CORPORATION	(FR)	1	6	Dry	990			
		1	39	Semi-Dry	87			
		1	39	Semi-Dry	93			
		<u>1</u>	4	38	Semi-Dry	<u>360</u>	1,530	1,836
5. GOODFOUND CEMENT CORPORATION *	(GCC)	1	4	Dry		350	420	
6. TAIHEIYO CEMENT PHILIPPINES, INC.	(TCPI)	1	4	Dry		840	1,008	
7. ILIGAN CEMENT CORPORATION	(ICC)	1	33	Dry		465	558	
8. LIMAY GRINDING MILL CORPORATION	(LGMC)	-	-	-			475	
9. LLOYDS RICHFIELD INDUSTRIAL CORPORATION	(LRIC)	1	44	Semi-Dry	127.5			
		1	38	Semi-Dry	127.5			
		<u>1</u>	3	33	Wet	<u>336</u>	591	709
10. MINDANAO PORTLAND CEMENT CORPORATION	(MPCC)	1	42	Dry		450	540	
11. NORTHERN CEMENT CORPORATION	(NCC)	1	33	Dry	480			
		<u>1</u>	2	33	Dry	<u>480</u>	<u>960</u>	1,152
12. PACIFIC CEMENT COMPANY, INC.	(PCCI)	1	39	Dry		180	216	
13. REPUBLIC CEMENT CORPORATION	(RCC)	1	43	Dry	127.5			
		1	40	Dry	127.5			
		1	36	Dry	330			
		<u>1</u>	4	6	Dry	<u>990</u>	1,575	1,890
14. RIZAL CEMENT COMPANY, INC.	(RCCI)	1	49	Wet	114			
		1	45	Wet	111			
		<u>1</u>	3	39	Wet	<u>150</u>	375	450
15. SOLID CEMENT CORPORATION	(SCC)	1	10	Dry	990			
		1	34	Wet	435			
		<u>1</u>	3	37	Wet	<u>435</u>	1,860	2,232
16. UNION CEMENT CORPORATION	(UCC)							
La Union Plant		1	10	Dry	720			
		1	40	Wet	93			
		1	42	Wet	93			
		<u>1</u>	4	46	Wet	<u>114</u>	1,020	1,224
Bulacan Plant (San Ildefonso)		1	34	Semi-Dry		234	281	
(Norzagaray)		1	37	Dry	810			
		<u>1</u>	2	7	Dry	<u>1,650</u>	2,460	2,952
Davao Plant		1	20	Dry	533			
		1	7	Dry	1,050			
		<u>1</u>	3	35	Wet	<u>159</u>	1,742	2,091
Lugait Plant (Alsons)	(ACC)	1	33	Dry	582			
		<u>1</u>	2	5	Dry	<u>1,200</u>	1,782	2,138
TOTAL			43				21,922	26,782

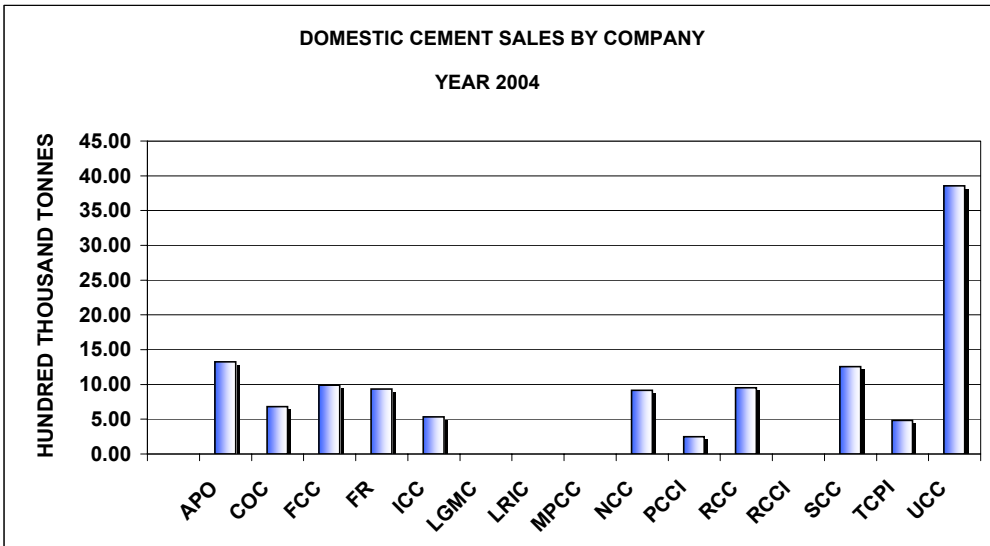
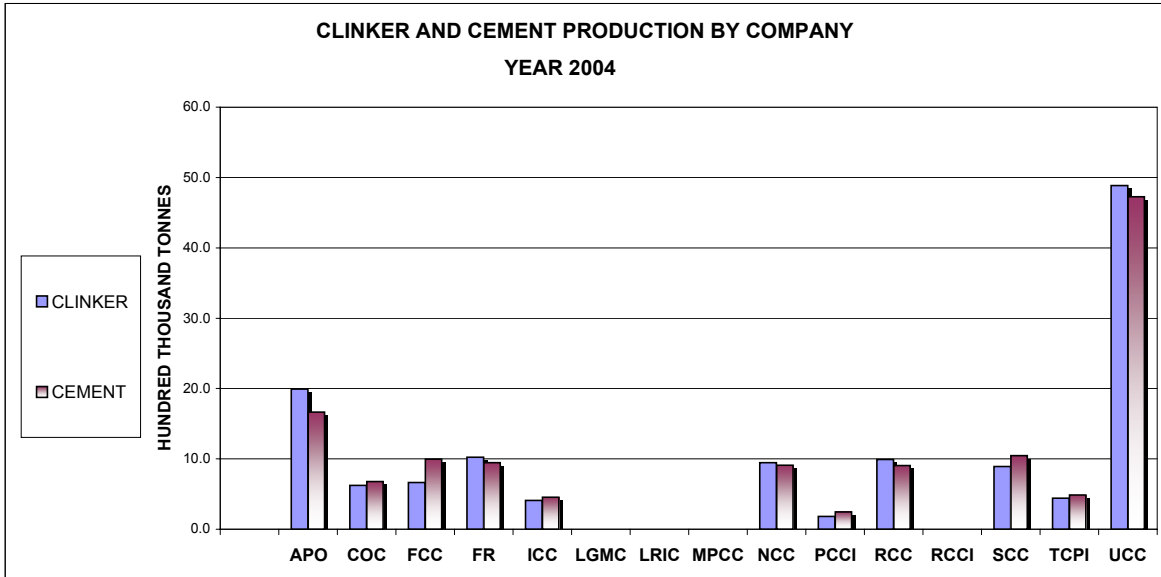
* Non-member

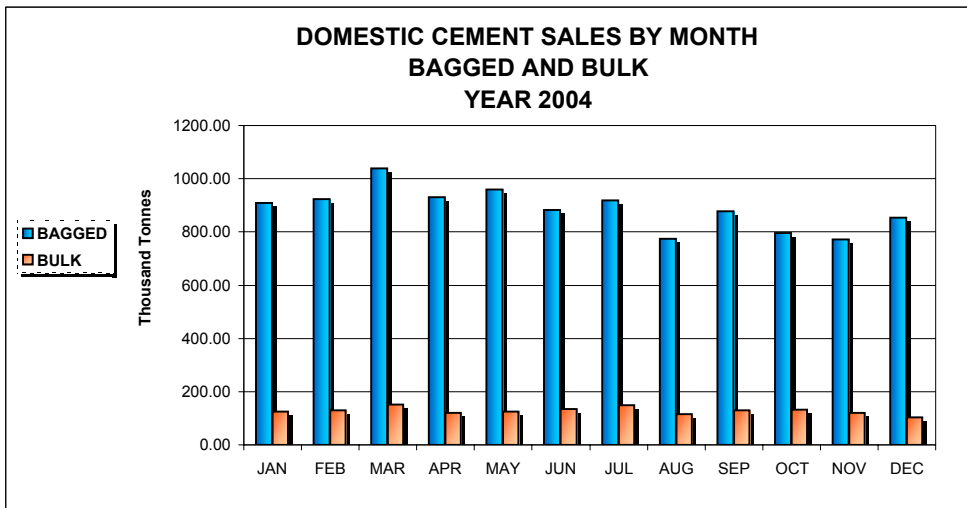
**CEMENT PRODUCTION VS. CEMENT CAPACITY BY COMPANY
YEAR 2004**



**CLINKER PRODUCTION VS. CLINKER CAPACITY BY COMPANY
YEAR 2004**





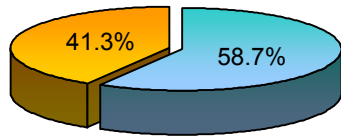


IMPORTS AND EXPORTS

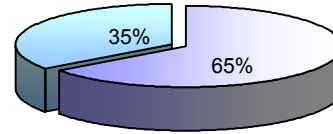
Unit: (In Metric Tonnes)

CEMENT IMPORTS		CLINKER IMPORTS	
Country of Origin	Quantity	Country of Origin	Quantity
Japan	12,705		0
Total	12,705	Total	0
CEMENT EXPORTS		CLINKER EXPORTS	
Country of Destination	Quantity	Country of Destination	Quantity
Conakry	94,407	Bangladesh	212,694
Guam	102	Sarawak	47,416
Hawaii	295,874	Caledonia	86,117
Majuro	179	Malaysia	40,581
Mauritius	189,045	UAE	40,337
New Zealand	164	Australia	27,000
Nigeria	133,344	Conakry	72,342
Pacific Islands	12,659	Vietnam	176,787
Palau	53,604		
Sarawak	39,601		
Tonga	283		
Zamoa	312		
Total	819,574	Total	703,274

PRODUCTION BY AREA (2004)



SALES BY AREA (2004)



■ Luzon
■ Visayas & Mindanao

**CEMENT
PRODUCTION/SALES BY AREA**

(Unit: Thousand Tonnes)

Area \ Year		1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
		1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
LUZON	PROD.	6,358	7,063	8,169	9,705	7,937	6,958	6,167	5,723	7,372	7,552	7,664
	SALES	6,362	7,067	8,076	9,796	7,799	7,757	6,639	6,252	7,469	7,766	7,901
VISAYAS & MINDANAO	PROD.	3,213	3,491	4,260	4,976	4,951	5,599	5,792	5,655	6,025	5,515	5,393
	SALES	3,234	3,542	4,197	4,740	5,001	4,803	5,182	5,093	5,829	5,324	5,089
TOTAL	PROD.	9,571	10,554	12,429	14,681	12,888	12,557	11,959	11,378	13,397	13,067	13,057
	SALES	9,596	10,609	12,273	14,536	12,800	12,560	11,821	11,345	13,298	13,090	12,990

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 (%)
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
2004	10,288	85	1,883	15	12,171	100

CEMENT EXPORTS BY DESTINATION

(Unit: Thousand Tonnes)

DESTINATION		1984	1985	1986	1987	1998	1999	2000	2001	2002	2003	2004
REGION	COUNTRY											
A S I A	BANGLADESH	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	19	-	-	-	-	-	74	100	111	-	
	MALAYSIA	-	-	-	-	-	-	-	-	-	-	40
	SHRI LANKA	-	-	-	-	-	-	-	-	-	-	15
	SINGAPORE	-	-	-	-	-	415	132	130	27	-	
	TAIWAN	-	-	-	-	-	-	588	830	123	134	
	THAILAND	-	-	-	-	-	-	-	-	-	-	
	VIETNAM	-	-	1	12	-	-	-	-	-	-	
TOTAL		136	367	105	39	0	586	1016	1240	444	180	40
O T H E R S	AFRICA	-	-	-	-	-	-	-	-	-	15	
	CONAKRY	-	-	-	-	-	-	-	-	-	33	95
	DOM. REP.	-	-	-	-	-	-	-	-	17	-	
	GUAM	-	-	-	-	-	-	-	-	-	1	
	HAITI	-	-	-	-	-	-	-	-	-	38	
	INDIA	-	-	-	-	-	-	-	-	-	-	
	LAGOS	-	-	-	-	-	-	-	-	-	70	
	MADAGASCAR	-	-	-	-	-	-	-	-	-	22	
	MAURITIUS	-	-	-	-	-	-	-	-	28	191	189
	MIDDLE EAST	-	-	-	-	-	36	-	-	-	-	
	NEPAL	5	20	-	-	-	-	-	-	-	-	
	NIGERIA	-	-	-	-	83	66	165	215	176	175	133
	PACIFIC ISLANDS	-	-	-	-	-	-	-	-	-	-	13
	PALAU	-	1	-	-	3	3	1	8	144	10	54
	USA	-	-	-	-	-	-	161	380	226	245	296
YEMEN	-	-	-	-	-	-	-	21	-	-		
TOTAL		5	21	0	0	86	105	327	624	591	800	780
GRAND TOTAL		141	388	105	39	86	691	1343	1864	1035	980	820
BULK		-	-	-	-	86	691	1,343	1,258	846	954	807
BAGGED		141	388	105	39	-	-	-	606	189	26	13

Remarks: There were no exports from 1988 to 1997.

CEMENT IMPORTS BY ORIGIN
1994-2004

(Unit: Thousand Tonnes)

ORIGIN	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
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	13
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	15	480	680	352	180	474	1,579	2,233	338	10	13

PHILIPPINE CEMENT INDUSTRY, 1994 - 2004

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.	%
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
2004	21,922	26,782	13,056	4.42	13,057	-0.08	12,171	0.50	0	-100.00	13	30.00	703	4.15	820	-16.33

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

**CEMENT CONSUMPTION, CONSTRUCTION GROWTH RATE,
POPULATION AND CEMENT PER CAPITA CONSUMPTION
1994 - 2004**

YEAR	CEMENT CONSUMPTION (In Million M.T.)	CONST. GROWTH (%)	POPULATION (Millions)	PER CAPITA CONSUMPTION (Kgs.)
1994	9.606	8.9	66.61	144.20
1995	11.089	6.5	68.17	162.60
1996	12.953	10.9	70.23	184.40
1997	14.888	16.2	71.89	208.20
1998	12.894	-8.1	73.59	176.30
1999	12.344	-2.1	75.32	163.80
2000	12.057	-6.0	76.50	157.60
2001	11.714	0.5	77.90	150.30
2002	12.601	0.3	79.50	158.50
2003	12.120	1.7	81.78	149.60
2004	12.184	15.8	82.66	146.98

2004 ASEAN CEMENT INDUSTRY IN BRIEF

Quantity in Thousand Tonnes

	INDONESIA	MALAYSIA	PHILIPPINES	SINGAPORE	THAILAND	VIETNAM	BRUNEI
CLINKER PRODUCTION CAPACITY	44,400	17,800	21,922	-	46,930	20,000	-
CEMENT GRINDING CAPACITY	47,500	28,300	26,782	8,500	-	26,500	550
CLINKER PRODUCTION	34,886	15,390	13,056	-	31,689	19,000	-
CEMENT PRODUCTION	33,230	17,080	13,057	-	36,689	26,500	244
CEMENT DOMESTIC DEMAND	30,208	14,540	12,184	-	25,452	26,000	248
AVERAGE DOMESTIC PRICES (Bagged Cement Delivered per Ton) (In US\$/MT)	60.80	48.95	71.63	54.50	56.96	58.00	0.00

Source: 7th East Asian Cement Forum

CEMENT MANUFACTURERS' ASSOCIATION OF THE PHILIPPINES, INC.
DIRECTORY OF CEMENT COMPANIES

- | | |
|---|--|
| <p>1. APO CEMENT CORPORATION
(Under CEMEX PHILIPPINES)
Office Address:
24th Floor, Petron Mega Plaza Building
358 Senator Gil Puyat Avenue, Makati City
Tel: 849-3600; 849-3700
Fax: 849-3619/3679</p> <p>Plant Address:
Tina-an, Naga, Cebu
Tel: 032-273-3300
Fax: 032-273-9339</p> <p>2. CONTINENTAL CEMENT CORPORATION
(Under LAFARGE CEMENT)
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</p> <p>Plant Address:
Barrio Bigte, Norzagaray, Bulacan
Tel: 759-7952 to 59; 719-3840
Fax: 759-7950 to 51</p> <p>Barrio Balimbing, Tanay, Rizal
Tel: 0912-328-3659
Fax: 0912-328-3659</p> <p>3. FORTUNE CEMENT CORPORATION
(Under LAFARGE CEMENT)
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</p> <p>Plant Address:
Mapulo, Taysan, Batangas
Tel: 063-719-3840
Fax: 0912-306-5224</p> | <p>4. FR CEMENT CORPORATION
(Under LAFARGE CEMENT)
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</p> <p>Plant Address:
Barangay Dalumbayan,
Teresa, Rizal
Tel: 650-6640; 644-8826 to 30
Fax: 650-5171</p> <p>5. GOODFOUND CEMENT CORPORATION *</p> <p>Plant Address:
Camalig, Albay</p> <p>6. TAIHEIYO CEMENT PHILIPPINES, INC.
(formerly Grand Cement Corp.)
Office Address:
6TH Flor, Insular Life Building,
Gorordo Avenue, Cebu City
Tel: 032-231-5333
Fax: 032-231-4825</p> <p>Plant Address:
South Poblacion,
San Fernando, Cebu City
Tel: 032-231-5333
Fax: 032-231-4825; 254-5242</p> |
|---|--|

* Non-member

7. **ILIGAN CEMENT CORPORATION**

(Under LAFARGE CEMENT)

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**

(Under LAFARGE CEMENT)

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**

(Under LAFARGE CEMENT)

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**

(Under LAFARGE CEMENT)

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**

(Under LAFARGE CEMENT)

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.**

(Under CEMEX PHILIPPINES)

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

(Under CEMEX PHILIPPINES)

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. HOLCIM

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:

(1) La Union Plant:

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

(2) Bulacan Plant:

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

(3) Davao Plant:

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

(4) Lugait Plant - (formerly ALSONS CEMENT):

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