

# *2015 Annual Cement Industry Report*



*Building Beyond Business ... A Sustainable Partner in Nation Building*

Cement Manufacturers'  
Association of the Philippines Inc.  
(CeMAP)



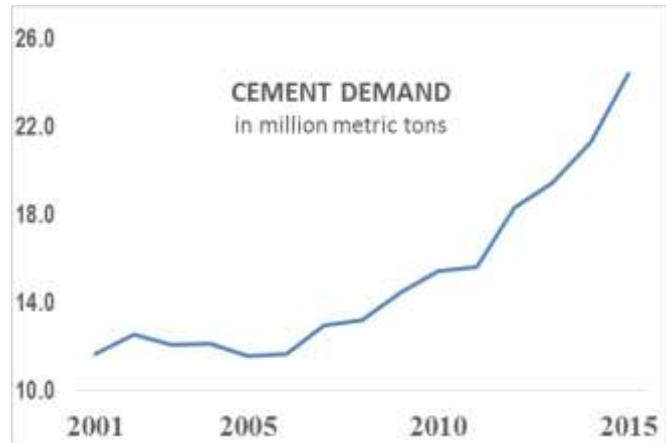
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## PRESIDENT'S MESSAGE

The country is experiencing a continuing increase in cement demand. In 2015, the total demand of 24.4 million tons of cement is the highest so far. The double digit increase of 14% in cement demand reflects the 20% public construction growth rate in 2015.

The forecast is that local demand for cement may continue to increase in the coming years. The cement manufacturers have thus undertaken and are planning to undertake increase in cement production capacity to meet the demand.



With cement as a critical component of infrastructure development, CeMAP sees the increase in cement demand as an advancement of nation building. CeMAP's vision is of a cement industry that is a strong and sustainable partner in nation building. CeMAP, thus, works closely with its members, the cement manufacturers, in improving the situation of the downstream and upstream stakeholders of the cement industry in the pursuit of this vision.

For the downstream stakeholders, this means giving better quality product and service to cement users. CeMAP members established an aftermarket infrastructure, which allows them to respond to consumer needs and concerns more quickly and effectively. In terms of quality, CeMAP ensure consumers safety and protection by adopting stringent procedures in testing of cement. The cement laboratory of CeMAP, the Cement Testing Center tests five product samples (3 from the plant and 2 from stores for every type of cement, every month, for every plant of the CeMAP member).

CeMAP has also undertaken the initiative of becoming a proficiency testing provider for cement testing laboratories in the country. Through the initiative, through the endorsement of DPWH, all cement testing laboratories are enjoined to participate in the annual activity of testing their proficiencies. The increased cement demand will need the participation of increased number of cement testing laboratories to ensure that consumers get the correct quality of cement. The testing laboratories have to be accurate in their determination of the quality of cement. CeMAP's proficiency testing program addresses this concern.

For the upstream stakeholders, CeMAP looks into improving the situation of the mining sector, and use of raw materials and fuel resources. CeMAP members regularly get awards from the Presidential Mineral Industry Environmental Award (PMIEA), Philippine Mine Safety and Environment Association (PMSEA) and Mines and Geosciences Bureau (MGB) annually. The members are recognized for their environmental stewardship, for championing responsible natural resource management, empowerment of host communities, land use improvement and site rehabilitation. They are also winners in the best mining forest and safest mineral processing contests.

On the use of raw materials and fuel resources, CeMAP members resort to co-processing. The scheme, called co-processing, involves the recovery of mineral or energy content of waste materials for use in cement production. Portions of traditional fuels are replaced with alternatives, such as refuse-derived fuel or RDF. CeMAP members are thus responding positively to the challenge of waste management by teaming up with local government units to turn waste into alternative fuel for cement kilns. RDF is an alternative where qualified, tested and processed non-biodegradable waste is sorted and shredded in a manner that is both acceptable and suitable for use as alternative fuel in cement kilns.

CeMAP also involves itself in the logistical requirements of the industry with safety and efficiency as objectives in the delivery of cement to the end users. CeMAP organized the Vehicle and Traffic Safety Conference where 300 haulers, truck drivers, and road safety advocates attended the conference. The conference resulted to sharing of personal knowledge and experiences of the participants, which were used as basis for the safety tips. Heavy emphasis was given to driver behavior as they share the road with cargo trucks. In 2015, CeMAP with the Department of Transportation and Communications (DOTC), the Federation of Philippine Industries and Alliance of Truckers, organized the Cargo Transport Conference Forum dubbed, "All Together for Road Safety".

The cement industry association is the only industry association among the 34 industry association members of the Federation of Philippine Industries (FPI) that won in all the four categories in the Sustainable Development Initiatives Recognition Awards held annually by the FPI. CeMAP was adjudged the most outstanding industry association in the Optimum Use of Resources category (2014), in the Corporate Social Responsibility category (2011), in the Waste Management category (2011) and in the Health & Safety category (2012).

This year, through CeMAP, Sustainability Reporting will be considered as the basis for recognizing industry associations that practice sustainable development. Sustainability reporting is a method to internalize and improve an organization's commitment to sustainable development in a way that can be demonstrated to both internal and external stakeholders. With the launch of the UN Sustainable Development Goals (UN SDGs) and the increasing concern on climate change, it is imperative that the Philippine industry take steps in enhancing sustainable development practices. Sustainability reporting keeps track of these practices systematically. Governments and stock exchanges of at least 33 countries have required or encouraged sustainability reporting. CeMAP will now spearhead the move for the adoption of Sustainability Reporting among FPI members as its contribution to attain a more sustainable economy in the country.

A significant change in the industry during 2015 is the merger of Holcim and Lafarge and the entry of CRH and Aboitiz Equity Ventures (AEV) acquiring the assets of Lafarge. CeMAP recognizes CRH as global leader in the manufacture and supply of a diverse range of building materials and AEV as having the industrial expertise and local market knowledge. The merger of Holcim and Lafarge resulted to "LafargeHolcim" as an entity and the entry of CRH and AEV to "Republic Cement and Building Materials, Inc" (RCBM) as the other entity.

CeMAP welcomes LafargeHolcim and RCBM as its members. Their participation in CeMAP enhances the attainment of the vision of a cement industry as a sustainable and strong partner in nation building. With the continuing increase in cement demand, CeMAP looks forward to becoming more involved in promoting better service and cement quality, better use of resources, environment protection and enhancement this 2016.

Signed:



**ERNESTO M. ORDOÑEZ**  
President

## B. DIRECTORY OF CEMAP MEMBERS

### CEMEX Philippines Group of Companies

Office Address: 8th Floor, Petron Mega Plaza, Sen. Gil Puyat Ave., Makati City, Philippines

Contact Person: Mr. Chito Maniago Director for Corporate Communications and Public Affairs

Telephone Nos. : +(63 2) 849-3600; 849-3700 Fax Nos.: +(63 2) 849-3619; 849-3679

Website: [www.cemex.com](http://www.cemex.com)

E-mail: [chito.maniago@cemex.com](mailto:chito.maniago@cemex.com)

#### Solid Cement Corporation

Plant Location : Antipolo City, Rizal

##### Products

Brand	Type
Island Portland Cement	Type 1
Rizal Portland Super	Type 1P
Rizal Masonry Cement	Type M
Palitada King	Type S

Its Solid Cement Plant located in Baran- gay San Jose, Antipolo City has received numerous international certifications including ISO 9001:2001, ISO 4001:2004, ISO 18001:2007 and ISO 17025.



#### APO Cement Corporation

Plant Location : APO Cement Plant Compound, Tina-an, Naga City, Cebu

##### Products

Brand	Type
APO Portland Cement	Type 1
APO Portland Premium	Type 1P
APO Pozzolan	Type P
APO Masonry Cement	Type M
Palitada King	Type S

Its APO Cement Plant in Naga, Cebu has received the International Management System Certification including ISO 9001:2008 , ISO 14001:2004 & OHSAS 18001:2007.



**LafargeHolcim Philippines, Inc.**

Office Address: 7th Floor, Two World Square, Mckinley Hill, Fort Bonifacio, Taguig City

Contact Person: Nerissa Ronquillo – Corporate Communications  
Telephone No.: +63 2 459 3333 Fax No.: +63 2 459 3444  
Website: [www.holcim.com/ph](http://www.holcim.com/ph)  
E-mail Address: [nerissa.roquillo@holcim.com](mailto:nerissa.roquillo@holcim.com)

Facilities:

**La Union Plant**

Quirino, Bacnotan, La Union

**Bulacan Plant**

Matictic, Norzagaray, Bulacan

**Lugait Plant**

Lugait, Misamis Oriental

**Davao Plant**

Barrio Ilang, Davao City

**Batangas Cement Terminal**

Barangay San Rafael, Calaca, Batangas

**Iloilo Cement Terminal**

Lapuz Norte, Lapaz, Iloilo City

**Mabini Cement Grinding Plant**

Bgy. Pulong Balibaguhan, Mabini, Batangas

All Holcim Philippines Inc. cement plants have received the following International Certifications: QMS: ISO 9001:2008, EMS: ISO 14001:2004, & OHSMS: OHSAS 18001:2007



## Republic Cement and Building Materials, Inc.

Office Address: 20th Floor, Salcedo Tower, 169 H. V. Dela Costa Street Salcedo Village, Makati City, Philippines

Contact Person: Cirilo M. Pestaño II Vice President – Public Affairs  
Telephone No.: +(63 2) 885-4599 / 238-9881 Fax No.: +(63 2) 815-2668 / 815-2678  
Website: [www.republiccement.com](http://www.republiccement.com)  
E-mail: cirilo.pestano@republiccement.com

Facilities:

### Republic Bulacan Plant

Plant Address: Barrio Minuyan, Norzagaray, Bulacan

Products:

Brand	Type
Republic Portland Plus®	Type 1P
Rapidset®	Type 1
Republic®	Type 1(bulk)

The Bulacan Plant of Republic, Inc. has received international certifications.  
QMS: ISO 9001: 2000, EMS: ISO



### Republic, Inc. Norzagaray Plant

Plant Address: Barrio Bigte, Norzagaray, Bulacan

Products:

Brand	Type
Republic Portland Plus®	Type 1P
Rapidset®	Type 1
Republic®	Type 1(bulk)
Republic Type V	Type V
Republic Portland Duo®	
Republic Wallmaster	Type N
Republic Type II	Type II

The Norzagaray Plant of Republic, Inc. has received international certifications. QMS: ISO 9001: 2000, EMS: ISO 14001: 2004, HSMS: OSHAS 18001: 2007



**Republic, Inc. Batangas Plant**

Plant Address: Mapulo, Taysan, Batangas

Products

Brand	Type
Republic Portland Plus	Type 1P
Fortune®	Type 1P
Rapidset®	Type 1
Republlic®	Type 1(bulk)

The Batangas Plant of Republic, Inc. has received international certifications. QMS: ISO 9001: 2000, EMS: ISO 14001: 2004, HSMS: OSHAS 18001: 2007



**Republic Teresa Plant**

Plant Address: Barangay Dulumbayan, Teresa, Rizal

Products:

Brand	Type
Republic Portland Plus®	Type 1P
Republic Fortune®	Type 1P
Republlic®	Type 1(bulk)

The Teresa Plant of Republic, Inc. has received international certifications. QMS: ISO 9001: 2000, EMS: ISO 14001: 2004, HSMS: OSHAS 18001: 2007



**Republic Iligan, Inc. / Republic Mindanao, Inc.**

Plant Address: Barrio Kiwalan, Iligan City

Products:

Brand	Type
Republic Portland Plus®	Type 1P
Mindanao® Pozzolan Premium™	Type P
Rapidset®	Type 1
Republlic®	Type 1(bulk)

The plant of Republic Iligan, Inc. has received international certifications. QMS: ISO 9001: 2000, EMS 14001: 2004, HSMS: OSHAS 18001:2007





**Northern Cement Corporation**

Office Address: 5th Floor, ECJ Condominium, Real corner Arzobispo Streets, Intramuros, Manila City, Philippines

Contact Person: Richard Sebastian, Vice-President for Marketing  
 Engr. Emeterio N. Asuncion, Plant Manager

Telephone Nos.: +(63 2) 527-8281; 527-1924 Fax Nos.: +(63 2) 527-3931; 527-5422

Website: [www.ncc.com.ph](http://www.ncc.com.ph)

E-mail: risebastian@ncc.com.ph

Plant Address: Northern Cement Plant, Barrio Labayug, Sison, Pangasinan

Products:

Brand	Type
Northern	Type I

Northern Cement Corporation, Pangasinan, has received international certifications ISO 9001:2008, ISO 14001:2004 and ISO 18001:2007



**Taiheiyō Cement Philippines, Inc.**

Office Address: 11th Floor Insular Life Cebu Business Centre, Mindanao Avenue cor Biliran Road Cebu Business Park, Cebu City 6000, Philippines

Contact Person: Engr. Emylita B. Ortega  
 Division Manager, Corporate Affairs

Telephone No.: (63 32) 230 7396 Fax No.: (63 32) 230 7300

Website: [www.taiheiyō-cement.com.ph](http://www.taiheiyō-cement.com.ph)

E-mail: eortega@taiheiyō-cement.com.ph

Plant Address: Taiheiyō Cement Philippines Inc., South Poblacion, San Fernando, 6018 Cebu

Products:

Brand	Type
Grand Portland	Type 1
Grand Premium	Type 1P
Grand Pozzolan	Type P
Grand Masonry	Type M



Taiheiyō Cement Philippines, Inc.'s plant in San Fernando, Cebu is internationally-certified to ISO 9001:2008 (Quality Management System), ISO 14001:2004 (Environmental Management System) and OHSAS 18001:2007 (Occupational Health and Safety Assessment Series).

## TABLES AND FIGURES

Figure 1. Total Sales and Demand Consumption of Cement (In '000 MT), 2003-2015

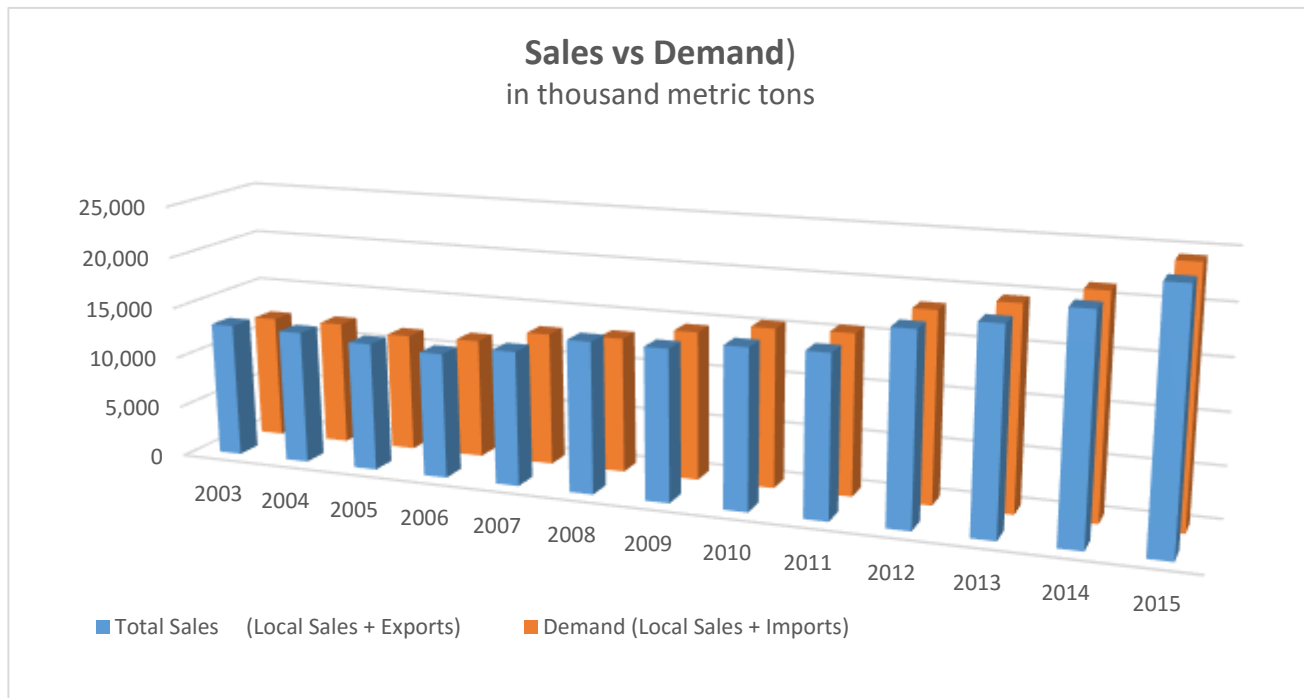
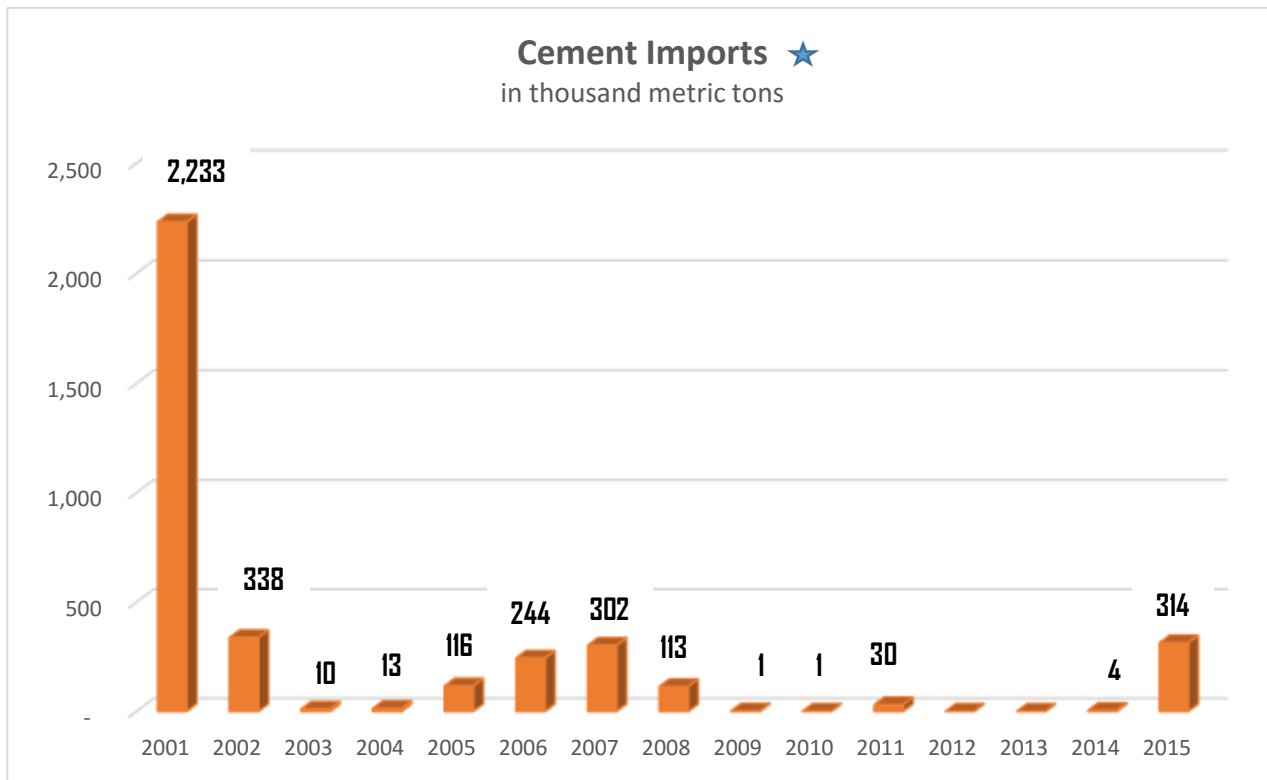


Table 1. Capacity, Production, Sales, and Consumption of Cement ('000 MT) 2003 - 2015

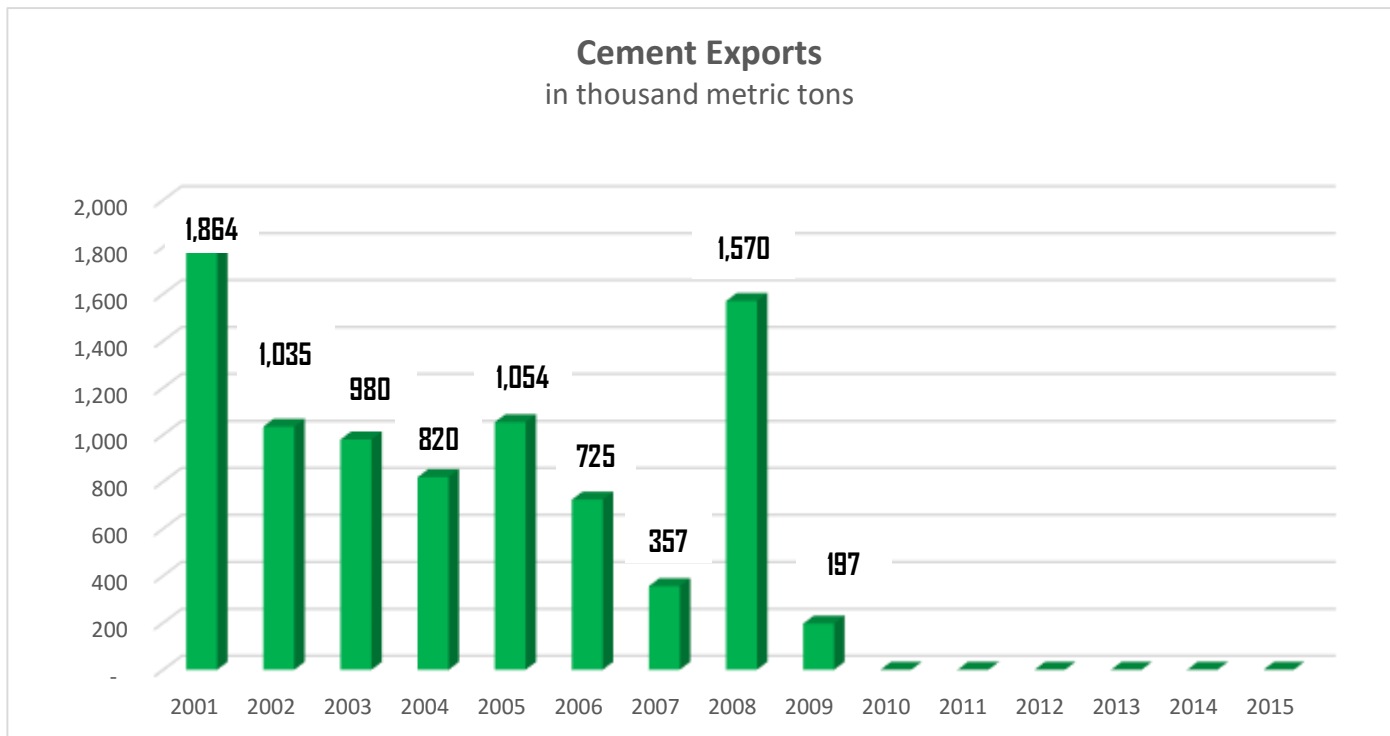
Year	Kiln Capacity	Grinding Capacity	Production	Total Sales (Local Sales + Exports)	Demand (Local Sales + Imports)	% Change
2003	18,847	26,369	13,067	13,090	12,120	-3.80%
2004	18,847	26,369	13,057	12,991	12,184	0.53%
2005	18,847	26,369	12,368	12,523	11,585	-4.92%
2006	18,847	26,369	12,033	12,195	11,714	1.11%
2007	18,847	26,369	13,048	13,066	13,011	11.07%
2008	18,847	26,369	13,369	14,674	13,217	1.58%
2009	19,547	26,369	14,865	14,666	14,470	9.48%
2010	19,547	25,886	15,900	15,449	15,450	6.77%
2011	21,047	26,911	16,063	15,595	15,625	1.13%
2012	21,047	26,911	18,907	18,356	18,395	17.73%
2013	21,047	28,100	20,150	19,445	19,604	6.57%
2014	21,047	28,100	21,305	21,301	21,305	8.68%
2015	21,047	28,100	24,050	24,046	24,360	14.34%

**Figure 2. Total Cement Imports, 2001-2015 (in '000 Metric Tons)**

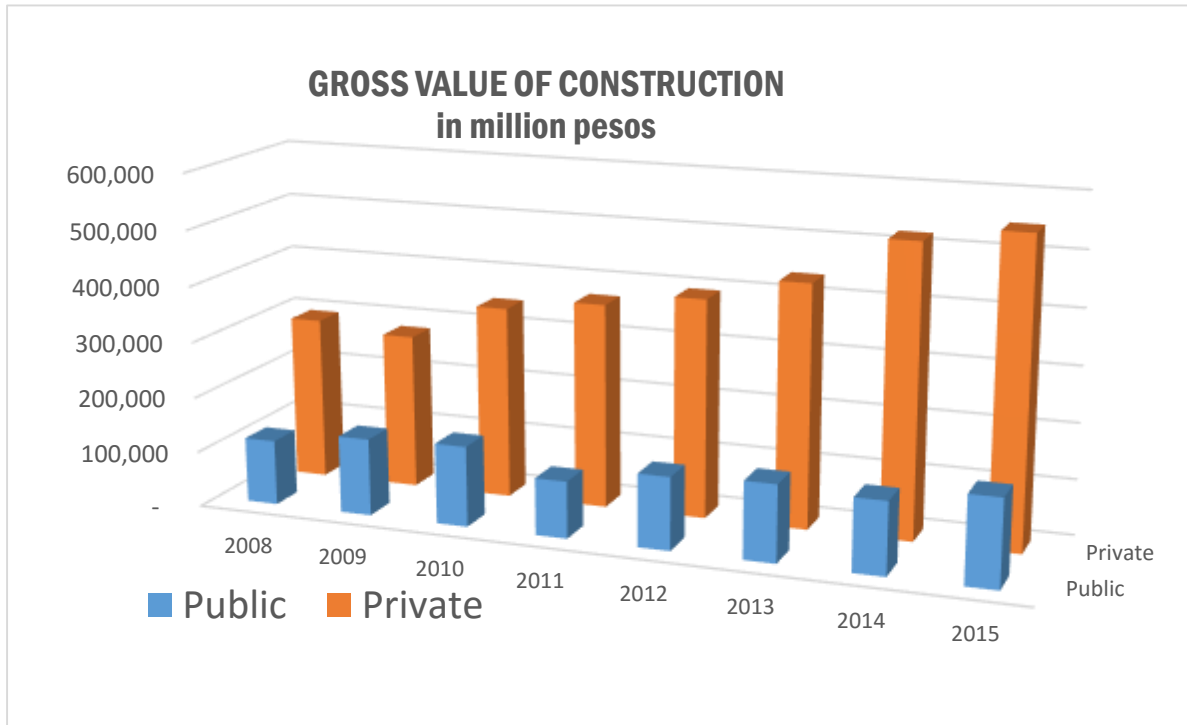


★ Imports only of traders

**Figure 3. Total Cement Exports, 2001-2015 (in '000 Metric Tons)**



**Figure 4. Gross Value of Construction: Public versus Private**  
*Million Pesos at 2000 Constant Prices*



**Table 2. Gross Value of Construction (2008-2015)**  
in Million Pesos at 2000 Constant Prices

Industry Group	2008	2009	2010	2011	2012	2013	2014	2015
Public	116,752	138,580	144,247	101,902	130,186	137,811	129,843	156,212
Private	294,289	279,128	346,413	368,400	393,178	435,664	520,771	547,328
Gross Value	411,041	417,708	490,660	470,302	523,364	573,475	650,614	703,540

**Table 3. Annual Growth Rates of Construction (2008 -2015)**

Industry Group	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015
Public	18.70%	4.09%	-29.36%	27.76%	5.86%	-5.78%	20.31%
Private	-5.15%	24.11%	6.35%	6.73%	10.81%	19.54%	5.10%
Gross Value	1.62%	17.46%	-4.15%	11.28%	9.57%	13.45%	8.13%

## THE ASSOCIATION

### Our Vision

An organization that is committed to make the cement industry a growing and sustainable partner in nation building, by ensuring that high quality cement is produced.

### Our Mission

Promote the cement industry as:

- A key partner in contributing to infrastructure development and economic growth;
- An effective advocate for all members of the Philippine cement industry;
- A responsive organization in addressing industry-wide issues;
- A foundation for stronger, more stable relationships among all stakeholders of the Philippine cement industry.

### Goals

To make the cement industry a leader in Philippine industry in four areas:

1. World-class and environment-friendly technologies and products;
2. Management Systems;
3. Corporate Social Responsibility;
4. Health and Safety

### Board of Trustees

Chair:	Renato C. Sunico
Co Chair:	Paul Vincent Arcenas
President:	Ernesto M. Ordoñez
Treasurer:	Veralynn A. Joromo
Corporate Secretary:	Edgardo Jovellanos
Board Members:	Arbis, Maria Allen (LafargeHolcim) Asami, Satoshi (Taiheiyo) Mallillin, Robert (Northern) Palomino, Pedro (Cemex) Perez, Jocelyn (LafargeHolcim) Pestano, Cirilo (Republic) Sahagun, Eduardo (LafargeHolcim) Soriano, Eduardo (Republic)

### CeMAP Committees

Committees	Chairs
Public Policy & Legislative	Arcenas, Paul Vincent
Sustainable Development	Sahagun, Eduardo
Product Standards	Pestano, Cirilo

## CeMAP Office



#1 Corporal Cruz St. corner E. Rodriguez Jr. Avenue  
Bagong Ilog, Pasig City 1600 Philippines

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Website: [www.cemap.org.ph](http://www.cemap.org.ph)