Build Consensus and Pool Energy to Promote the Sustainable Development of World Cement Industry

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1. World Cement Association

(1) Increase members and stage a platform of exchanging experience and building consensus for cement enterprises worldwide.
76 members in over 30 countries, representing an annual cement capacity of nearly 1.5 billion tons.

1. World Cement Association

(2) Connect the members in ways such as World Cement Conference and share and promote new technologies, new equipment and new business modes.

- 1st World Cement Conference: Dec. 2017 in London, UK
- 2nd World Cement Conference: Dec. 2018 in London, UK

1. World Cement Association

(3) Urge the world cement industry to respond to the challenge of global climate change together with a more active attitude.

June 28, 2018 in Paris, France

WCA Global Climate Change Forum held to discuss the *Climate Change Action Plan*

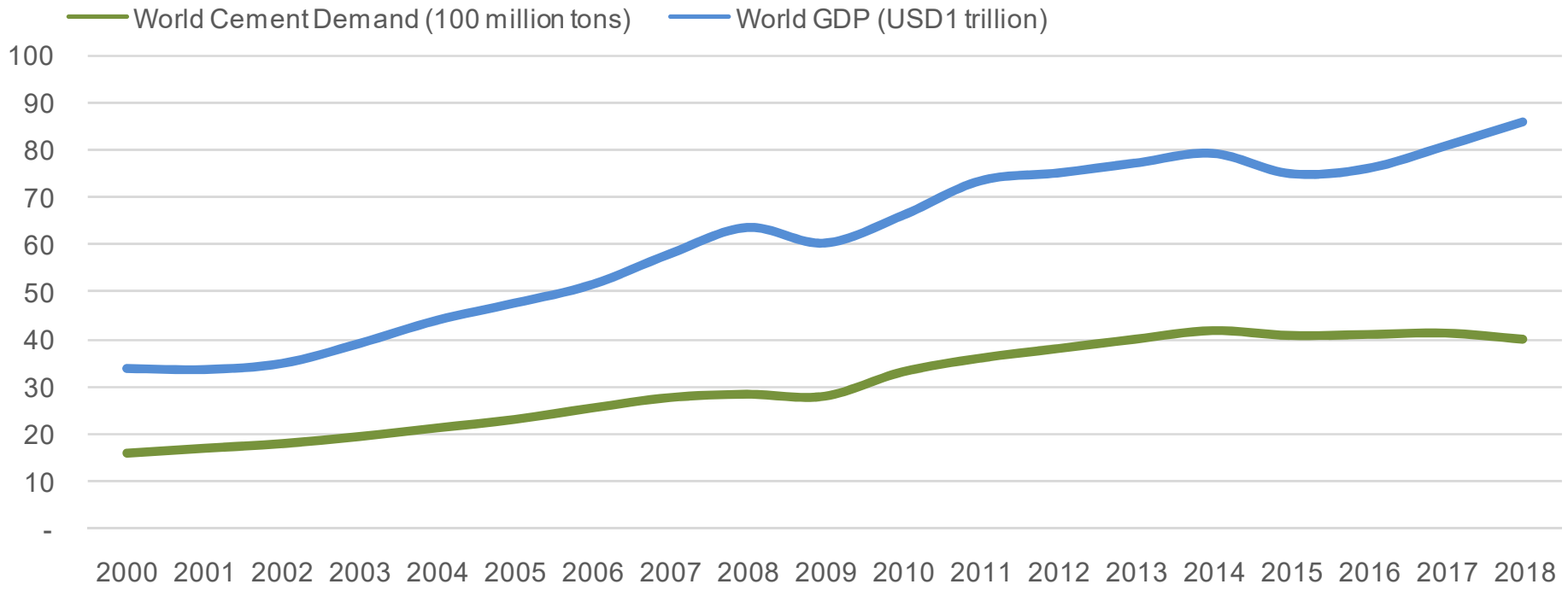
1. World Cement Association

(4) Construct a system for the world cement industry and international institutions to communicate and cooperate for win-win results.

March 5, 2019 in Washington D.C., USA

World Bank Session on “Energy and the New Climate Economy: Transforming Hard to Abate Sectors”

2. Development and Outlook of the World Cement Industry



- History: In 1824, Portland cement was born in UK. --- In the 1970s, cement demand in developed countries reached the peak and then declined. --- In the 21st century, development center was relocated to emerging countries. --- Since 2014, as emerging countries entered the period of economic transformation, growth of the world's cement demand slowed down.

- 2018: Global cement demand was approximated at 4 billion tons, 2.5 times that in 2000.

Cement generated 2.5 billion tons of CO2, accounting for 7% of global CO2 emissions and making the industry the third largest emitter.

3.1 Chinese Cement Industry

(1) Promote the world technical equipment to progress.

- Upgrade 2,000TPD production lines to 10,000TPD.
- Provides process, equipment, intelligent control, engineering construction and operation and management service for the most energy-efficient, most environmental-friendly and most advanced cement clinker production lines.

(2) Advance the energy-saving/emission-reducing efforts and promote the harmonious coexistence between cement production and environment and the integrated development of economy and nature.

- Emissions: Particulate emission is less than 1/5 of the previous level; emissions of other pollutants are cut greatly.
- Energy consumption: Reduced by 30%.
- Waste heat recovery: 95% cement clinker production lines in China are equipped with low-temperature waste heat recovery system.

3.2 CNBM

- **It has developed into the world's largest building material producer and the world's leading integrated service provider.**

- Business

Rank first in the world in both capacity of cement, ready-mixed concrete, gypsum boards, glass fiber and wind turbine blades and engineering service in cement and glass.

- Fortune Global 500

A Fortune Global 500 company for nine consecutive years. In 2019, it ranked 203rd with an operating revenue of USD52.6 billion, the highest among building material enterprises globally for the first time.

3.2 CNBM

(1) Development mode: Choose to promote merger/reorganization in a large scope, which revitalizes the stock and reduces the increment. 2/3 capacity was acquired through merger/reorganization, increasing the clinker capacity concentration of Chinese cement industry from 12% in 2006 to 57% in 2018.

(2) Market: Advocate rational competition.
“Industrial interest precedes corporate interest and corporate interest is incubated in the industrial interest.”

3.2 CNBM

(3) Sustainability: Drive the cement industry for green and intelligent transformation.
Pay attention to such elements as environment, safety, quality, technology and cost in the sequence of importance.

(4) Industrial development: Play the role of a large enterprise to promote the supply-side structural reform in Chinese cement industry. Firmly carry out the policies of staggered peak production and restricted production for environmental protection and support the initiatives of limiting the increment, improving the cement standard and cutting overcapacity.

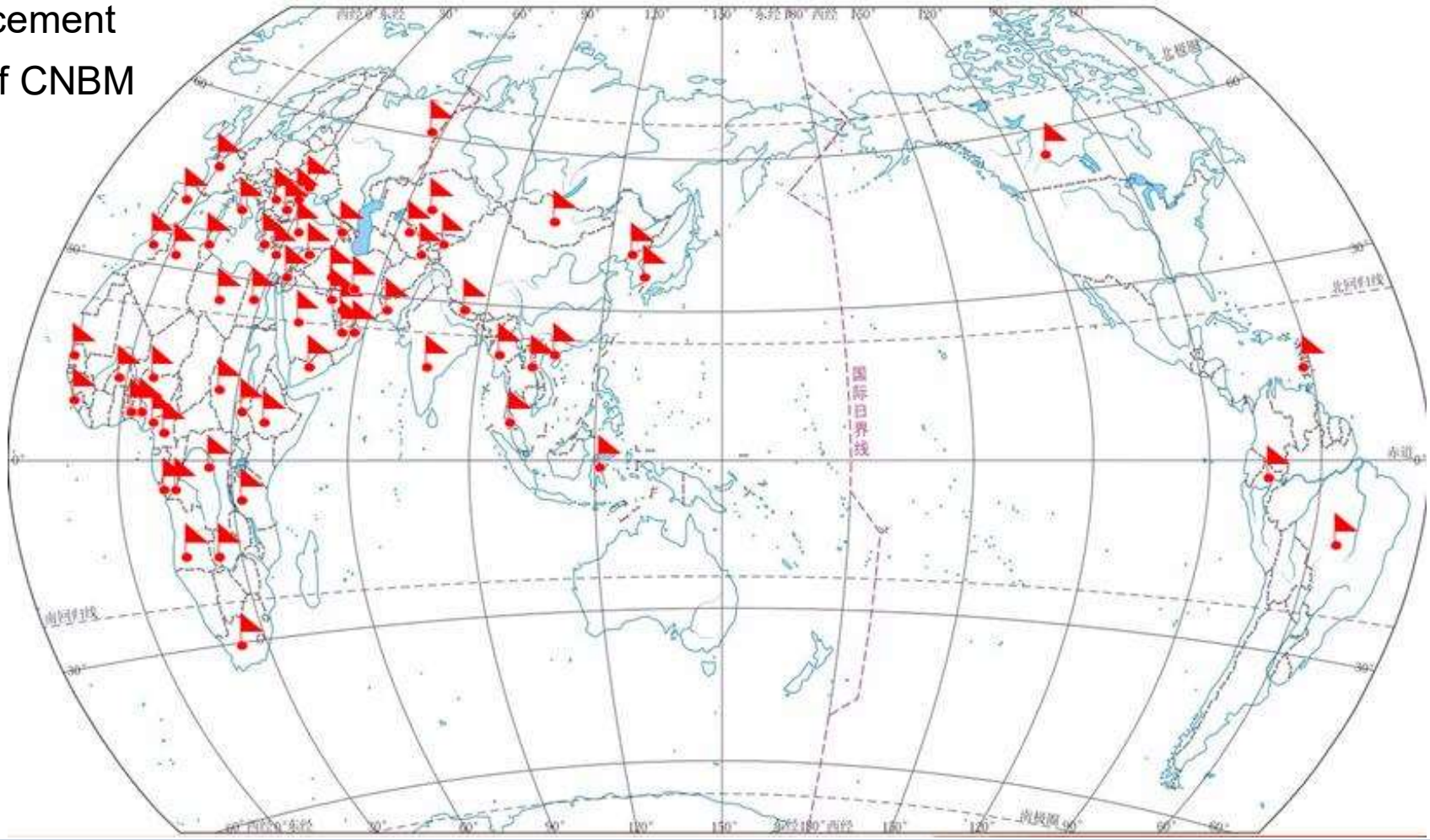
3.2 CNBM

(5) Support for the world's economic development: Provide raw material support for industrialization of countries along the "Belt and Road" with advanced technologies and advantageous capacity.
It takes up a 65% global market in whole-set equipment and engineering service and its techno-economic indicators lead the world.

3.2 CNBM

Distribution of cement

EPC projects of CNBM



4 Conclusion

· Paris Agreement

Keep the temperature rise well below 2 degrees Celsius over pre-industrial levels and pursue efforts to limit the temperature rise even to 1.5 degrees Celsius.

Aim to reach a global peak in GHG emissions as soon as possible and realize zero net GHG emission in the second half of the century.

· Development direction of the cement industry

Spare no effort to reduce carbon intensity during production, fuel use and ultimate product use to realize sustainable development.

THANKS!