



## Day One - 20 Oct 2015, Tuesday

08:00 Morning Registration & Refreshment

09:00 Chairman's Welcome Remarks  
& Introduction

09:10 **GLOBAL ECONOMIC OUTLOOK**

- Is the optimism in USA economy sustainable?
- Challenging economic outlook in Europe – what's the impact on Asia?
- Economic performance review under the new Indonesian government
- Regional market growth forecast
- Has China economy bottomed out?
- Fx forecast

*Mr. David Sumual, Chief Economist  
PT Bank Central Asia Tbk*

09:40 **INDONESIA'S GOVERNMENT  
INFRASTRUCTURE PROMISE &  
THE CEMENT INDUSTRY  
OUTLOOK**

- Cement demand/supply projections
- Drivers for growth
- New capacities updates & expansion plans
- Alternative fuel considerations
- Challenges facing the industry

*Mr. Suparni, President Director  
PT Semen Indonesia (Persero) Tbk*

10:10 **GLOBAL TRENDS IN THE  
CEMENT INDUSTRY**

- M&A activities to increase shareholder's value
- Global markets forecast
- Where are the hot spots for cement investment?

- Cement trade flow & future outlook
- Strategy to stay competitive

*Mr. Imran Akram, CEO  
IA Cement Ltd*

10:40 Discussion followed by Refreshments

11:10 **JAPAN CEMENT &  
CEMENTITIOUS MATERIALS  
MARKET & TRADE OUTLOOK**

- Demand/supply projections
- Olympic 2020 construction activities & its impact on cement demand
- Monetary easing policy on the competitiveness of cement industry
- Cement & slag trading challenges & key export markets
- Slag production capacity & market demand/ fly-ash supply from Coal fired power plant
- Introduction of Marubeni Group

*Mr. Makoto Nakano, CEO  
Marubeni Cement and Construction  
Materials Co., Ltd*

11:40 **INDIA'S CEMENT DEMAND  
UNDER MODI'S GOVERNMENT**

- Demand/supply outlook by region
- Drivers for growth
- Consolidation in the horizon
- Low crude prices & opening of domestic coal mine on energy cost
- New capacities & investment update

*Mr. Ajay Kapur, MD & CEO  
Ambuja Cements Ltd*

12:10 **CEMENT MARKET PROSPECT  
IN NEPAL**

- Demand/supply outlook & drivers for growth
- Infrastructure projects and reconstruction projects post April earthquake & its impact on cement demand

- Expansion & investment update
- Energy challenges & raw materials consideration
- Strategy to stay competitive with entry of new players

*Mr. Aditya Sanghai, Executive Director  
Ghorahi Cement Industry Pvt. Ltd*

12:40 Discussion followed by  
Networking Lunch

13:55 Afternoon Chairman's Introduction

14:00 **RECENT TRENDS IN DRY  
BULK SHIPPING MARKET:  
IMPLICATIONS FOR CEMENT  
AND CLINKER TRANSPORTATION**

- Cement & clinker trade flow
- Demand and supply in dry bulk market
- Expected trends in dry bulk vessels charter rates
- Implication for cement and clinker transportation

*Mr. Owen Mulford, Manager  
- Industrial Bulk  
Norden Shipping (Singapore) Pte. Ltd.*

14:30 **CURRENT TRENDS OF DRY MIX  
MORTAR IN SOUTH EAST ASIA**

*Malik Jamal Jaffar Ali  
Senior Technical Service Manager  
Wacker Chemicals (South Asia) Pte Ltd*

**WACKER**

15:00 **CEMENT EXPANSION PLANS &  
PROJECT UPDATE IN INDONESIA**

*Mr. Rachid Hamdani, Project Director  
PT Semen Bosowa Maros*

15:30 Discussion followed by  
Networking Refreshment

16:00 **FLY ASH/SLAG & CEMENTITIOUS  
MATERIALS MARKET OUTLOOK**

16:30 **ENVIRONMENTAL  
CONSIDERATION & ALTERNATIVE  
FUEL SOURCES FOR CEMENT  
OPERATIONS**

17:00 End of Day One

17:10 Networking Reception for  
all Participants

## Day Two - 21 Oct 2015, Wednesday

09:00 Chairman's Introduction

09:10 **LAOS CEMENT MARKET &  
GROWTH POTENTIAL**

- Demand/supply projections & demand drivers
- Capacities update and key producers



- Competitiveness of local producers vs imported products
- Is the industry ready to meet impending AEC 2015
- Energy challenges for cement production

*Mr. Zhou Zhihui, General Manager  
Lao Cement Industry Corporation Ltd*

09:40 **UPDATE ON CONSTRUCTION & CEMENT MARKETS IN MYANMAR**

- Infrastructure plans & construction activities
- Capacities & projects update

- Cement market demand/supply forecast
- Marketing & distribution challenges
- Opportunities and challenges facing the industry

10:10 **RIDING ON PHILIPPINES CONSTRUCTION BOOM**

- Current cement consumption and demand forecast
- Current capacity and forecast/new players
- Level of competition/ Herfindahl Index
- Impact of Government's infrastructure spending & PPP Projects development status on cement demand
- Product mix & prices
- Import threats and exports opportunity
- Availability of biomass/RDF/ alternative fuels to meet energy challenges

- Opportunities and challenges facing the industry

*Mr. Jagdeep Verma, Head of Business Consulting Dept.  
Holtec Consulting Pvt Ltd*

10:40 Discussion followed by Networking Refreshment

11:10 **GREEN INDUSTRY STANDARD FOR CEMENT SECTOR IN INDONESIA**

- Final draft regulation on green Industry Standard for cement sector in Indonesia & its impact on the industry
- Standard will consist criteria such as: Raw Material Spec, energy source, water consumption, production process, greenhouse gases, etc.
- Holcim's plans to meet the upcoming regulation & grow the green cement segment

*Mr. Oepoyo Prakoso  
Corporate Environment & Management System Manager  
PT Holcim Indonesia Tbk*

11:40 **CEMENT MARKET POTENTIAL IN SRI LANKA**

12:10 **WASTE HEAR RECOVERY FOR THE CEMENT SECTOR**

- Technology, economics & payback

12:40 Discussion followed by Closing Lunch

14:00 End of Conference

## "Amidst Asia's Expansion Plans & Strategy to Stay Competitive"

*"China's Hongshi Holdings Group has signed a joint venture with Nepal's Shivam Holdings to invest US\$300 million in a greenfield cement plant... Other big investors into the cement industry in Nepal are Nigeria's Dangote Cement and India's Reliance Cement."*

*Worldcement.com, 18/3/15*

*"San Miguel has allocated US\$800m for the two 2Mt/yr cement facilities, according to San Miguel president Ramon S Ang. Construction has already begun. One of the facilities is located at Northern Cement's plant in Pangasinan, while the other is being built in Quezon"*

*Globalcement.com, 10/7/15*

*"Prosperity Indonesia, an engineering company from Hong Kong, plans to build its second cement plant worth \$400 million in Tuban, East Java, at the end of this year to meet domestic demand for cement"*

*thejakartaglobe.beritasatu.com 7/5/15*

Growth in cement consumption in Indonesia is expected to improve later this year with the various infrastructure projects including toll roads, power plants, Mass Rapid Transit, railway projects and port developments across the country. However, how many of these projects will be implemented as scheduled and can the market absorb all the existing capacities, especially with new cement plants coming into operation this year, like Semen Conch in South Kalimantan, Semen Garuda in West Java, Holcim plant in Tuban, Semen Bima in Central Java and Makassar-based Bosowa cement.

Elsewhere in Asia, Philippines' cement sales grew by 9.6 percent in the first quarter from a year ago amid strong demand from both the public and private sectors. New cement plant investment and expansions are underway to meet the growing demand in the country. In Nepal, the booming cement sector lures investors like Dangote and Hongshi cement to invest in new greenfield cement plants. The devastating earthquake in April has also further push the demand for building materials including aggregate & cement to jump many folds once reconstruction of buildings begin. Myanmar, Laos and Sri Lanka are all witnessing a construction boom and offers opportunities to cement players.

The demand for green or low carbon cement is growing worldwide including Asia. What are the new technology available to further reduce the carbon footprint of cement producer?

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