

11th Africa CemenTrade Summit

28 - 29 March 2019 | Marrakech, Morocco

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Day 1 - 28 Mar 2019, Thursday

08:00 Morning Registration & Networking Refreshment

09:00 Chairman's Welcome Remarks & Introduction
Mr. Pedro Viegas Galvao, Director
SECIL, Companhia Geral de Cal e Cimento SA

09:10 **ENERGY CHALLENGES IN MOROCCAN CEMENT INDUSTRY**
Mr. Mohamed Boujnaoui, Chairman of the Partnerships & Prescription Committee of APC
Association Professionnelle des Cimenciers (APC)

09:40 **CIMAT'S PERSPECTIVE ON CEMENT MARKET IN SUB-SAHARA AFRICA**
(topic to be confirmed)

- A case of overcapacities or self-sufficiency?
- Market dynamics and investment plans

Senior Representative
CIMAT

10:10 Discussion followed by Networking Refreshment

10:45 **INVESTING IN GREENFIELD AND BROWNFIELD CEMENT PLANT ACROSS WEST AND CENTRAL AFRICA – LAFARGEHOLCIM'S PERSPECTIVE**
Mrs. Zineb Zeryouhi
Strategy & Development Director
LafargeHolcim Maroc Afrique

11:15 **HOW CAN LAB AUTOMATION IMPROVE AFRICAN CEMENT PRODUCER'S PROFITABILITY AND PRODUCTION EFFICIENCY?**

[Read topic abstract here](#)

Dr. Michael Enders, Head of Process & Quotations Laboratory Automation
thyssenkrupp Industrial Solutions AG, Cement Technologies



11:45 **LIMAK'S VIEW ON AFRICA'S CONSTRUCTION AND CEMENT SECTOR**

- Short information about Limak Cement Business in Turkey & around the World including new investments opportunities
- Review of Mozambique & Ivory Coast Cement Market & our investment.
- What Limak is thinking to do in the future in Africa & around the world

Mr. Erdem Oner, General Manager - Limak Afrika
Overseas Sales & Marketing and Trading Director
Limak Cement Group

12:15 Discussion followed by Networking Lunch

13:30 Afternoon's Chairman's Introduction
Mr. Ronald Ndegwa
Managing Director
Savannah Cement Ltd

Program details published herein are confirmed as at 20/03/2019. Please visit <http://www.cmtevents.com/main.aspx?ev=190311> for latest information on speakers & topics.

13:40 **LC3 UPDATE & FINANCIAL ATTRACTIVENESS**

- LC3 and its CO2 reduction potential
- The financial feasibility study

Mrs. Anne DeKeukelaere
Managing Director
Cementis GmbH

14:10 **GLOBAL CEMENT OUTLOOK**

- Africa in a global context
- Investment and M&A potential

Mr. Imran Akram, CEO
IA Cement Ltd

14:40 **FUTURE TRENDS IN CEMENT GRINDING FOR LOCAL MARKETS**

Mr. Falk Werner, Area Manager
Gebr. Pfeiffer SE



15:10 Discussion followed by Networking Refreshment

15:40 **MEETING CEMENT DEMAND IN NIGERIA AND THE REGION**

- Update on National Integrated Infrastructure Master Plan and the demand on cement consumption
- Fuel mix and its economics
- Supply challenges to neighboring Countries
- Expansion plans moving forward

Dr. Damola Omole
Power & Energy Strategy
Dangote Industries Limited

16:10 **CONTINUATION OF CEMENT GRINDING PLANT PROJECTS IN WEST AFRICA - UPDATE ON NEW CEMENT GRINDING PLANT IN GUINEA**
Mr. Olaf Michelswirth
General Manager
Interceam Engineering GmbH

16:40 **FINANCING OF CEMENT PROJECTS IN AFRICA**

- Bridging the gap between available capital and bankable projects
- What is the bank's view on the cement markets in Africa?

Mr. Alhassane Haidara
Manager, Non Sovereign Operations
Industries & Services
African Development Bank

17:10 Discussion followed by End of Day One

17:30 Networking Reception for all Participants

3 Ways To Register

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"Improving profitability and production efficiency in a rapidly expanding and competitive market!"

Abay Industrial Development Share Company has signed agreements with Chinese Hengyuan Group and Danish FLSmidth to build a cement plant in Dejen town, Amhara regional state, at a cost of 8.8 billion birr. 24/1/19, www.fanabc.com

United Cement Investor will start building a new 1.5Mt/yr cement plant at Bir Thlathin in southern Tataouine, Tunisia in March 2019. 9/1/19, www.globalcement.com

Oman's largest cement manufacturer, Raysut Cement Company is eyeing acquiring Athi River Mining Cement (ARM) of Kenya as part of the company's aggressive strategy to expand in East and Central Africa. 4/12/18, www.apanews.net

Cement investment in Africa continues to proliferate. However are there too many plants too soon and possibly with strong consumption yet to pick up... Is the industry heading towards an overcapacity or self-sufficiency? In sub-Saharan Africa, will the continuing flow of Chinese investment into infrastructure along the former Silk Road through the Belt & Road initiative offers opportunity to cement suppliers? Will demand in countries like Nigeria, South Africa and Kenya improve?

Northern Africa is rapidly turning into an export market as capacity outstrips local demand. Increasingly, countries like Tunisia, Egypt, Algeria are looking into export markets in West Africa or Europe. LafargeHolcim's new cement plant in Morocco is projected to be completed by 2020, how will this impact the North Africa supply/demand balance?

About 500,000 tonnes are exported in 2018 by Groupe industriel des ciments d'Algérie (GICA – Industrial Cement Group of Algeria), the Swiss company LafargeHolcim Ltd and the local Biskria Cement SPA. Abdesselem Bouab, general manager of the port of Djendjen, underlined that the port expects to accelerate cement export operations in 2019 to a total of 2.5 million tonnes. 4/10/18, www.portseurope.com

Cement faces significant challenges in reducing CO2 emissions and the key levers to cutting carbon emissions from cement production are improving energy efficiency, switching to lower-carbon fuels, reducing the clinker-to-cement ratio, and advancing process and technology innovation. According to IEA report, the clinker-to-cement ratio must continue to fall to a global average of 0.64 by 2030, through increased use of blended cements and clinker substitutes, including industrial by-products such as blast furnace slag or fly ash. In the long run, alternative clinker replacements that are widely available,

such as calcined clay in combination with limestone, become more important, as the decarbonisation of power generation and iron and steel making reduces the availability of these industrial by-products.

Receive latest on the LC3 project and the financial attractiveness to the cement industry. In addition, how can lab automation improve African cement producer's profitability and production efficiency. What is the future trends in cement grinding for the local markets.

Attend CMT's 11th Africa CemenTrade Summit in Marrakech, Morocco on 28-29 March 2019 to gain latest insights and network with industry players in the cement value chain.

- Find out more from **Association Professionnelle des Cimentiers (APC) of Morocco** on the competitiveness of cement market in morocco & growth driver
- **CIMAT** shares their perspective on cement market in **Sub-Sahara Africa**
- Gain first-hand information from **LafargeHolcim Maroc** Afrique on investing in greenfield and brownfield cement plant across **West** and **Central Africa**
- **Limak's** view on Africa's construction and cement sector
- Global cement outlook, investment and M&A potential to be analysed by **IA Cement**
- **Cementis** provides LC3 update & the financial attractiveness
- **ThyssenKrupp** shares how can Lab automation improve African cement producer's profitability and production efficiency?
- **Gebr Pfeiffer** speaks on the future trends in cement grinding for local markets
- Hear from **AfDB** their views on Africa cement markets and financing in Africa
- Find out the latest innovation from **Wacker Chemicals**
- Get the latest insights on competition & opportunities in east africa's cement markets from **Savannah Cement**
- **SECIL, Companhia Geral de Cal e Cimento** discusses clinker/cement markets in Tunisia and supply into West Africa
- Get latest update on cement markets in **Nigeria, Algeria** and **Ethiopia**

Sign up with your team today to enjoy group discount! Contact grace@cmtsp.com.sg for more information.

Day 2 - 29 Mar 2019, Friday

09:00 Chairman's Introduction
Mr. Imran Akram, CEO
IA Cement Ltd

09:10 **TRANSFORMING CEMENT TO A SUSTAINABLE CONSTRUCTION APPLICATION, TO SAVE WATER AND ENHANCE PERFORMANCE**

Mr. Emmanuel Achour
Business Development Manager
Wacker Chemicals Middle East

WACKER

09:40 **CLINKER/CEMENT MARKETS IN TUNISIA AND SUPPLY INTO WEST AFRICA**

- Domestic supply/demand projections
- Export opportunities & economics into West Africa
- Impact of CO2 price on cement / clinker export from Europe to West Africa - can North Africa fill the gap?
- Prospects of Tunisian cement exports to the Libyan market

Mr. Pedro Viegas Galvao, Director
SECIL, Companhia Geral de Cal e Cimento SA

10:10 **ALGERIA CEMENT MARKET AND ITS EXPORT POTENTIAL**

- Local supply/demand outlook
- New capacities and its impact on cement market

- Transforming Algeria to a cement export hub and key export markets
- Competitiveness & challenges facing cement producer

Mr. Tarek Semmoudi
Commercial & Marketing Director
Spa Biskria Ciment

10:40 Discussion followed by
Networking Refreshment

11:10 **EAST AFRICAN CEMENT INDUSTRY**

- Demand vs supply
- Competition & Opportunities
- Key Factors of Production
- Future Outlook

Mr. Ronald Ndegwa
Managing Director
Savannah Cement Ltd

11:40 **PRODUCING LOWER COST, STRONGER AND SUSTAINABLE CEMENT USING FLY ASH**

- Global Fly Ash Market & Trends in Africa
- Technical Advantages & Applications of Fly Ash
- Lowering Cost of Production, Improving Profitability of Cement with Fly Ash

Mr. Rishit Dalal, Director
- Projects & International Business
Jaycee India

12:10 Final Discussion followed by
Closing Lunch

13:45 End of Conference.