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SIMULTANEOUS FRENCH ↔ ENGLISH TRANSLATION PROVIDED

Dangote Cement  
Athi River Mining Co. (ARM)  
Libyan Cement Company  
JPMorgan  
CPI- Centro de Promoção de Investimentos  
(Investment Promotion Centre) of Mozambique  
South African Federation of Civil  
Engineering Contractors (SAFCEC)  
European Investment Bank  
African Development Bank  
HC Trading  
Howe Robinson & Co. Ltd, London  
BMI Europe srl  
PEG S.A.  
Ciments de l'Atlas  
Egyptian Cement Company - ECC  
CIOK  
Hangzhou Sino-Swiss Investment  
Management Co., Ltd

# Africa Cement Trade

**28-29 April 2009 | Tunis, Tunisia**  
Sheraton Tunis Hotel & Towers

***Next frontier - seizing opportunities &  
supplying to infrastructure boom  
in Africa!***

promotion partners

official publication



## Day 1 - Tuesday, 28 April 2009

8:00 Registration & Coffee

9:00 Chairman's Introduction & Welcome Remarks

### 9:10 Consolidation Trends & Shareholder Value in the Cement Industry

*Alberto Piana, Executive Director  
Building Materials Team  
JPMorgan*

### 9:45 West Africa Cement Outlook

*Tony Hadley, CEO  
Dangote Cement*

10:20 Discussion followed by Refreshment

### 10:55 Cement Outlook in East Africa

- Demand/supply outlook
- Expansion plans & investment update
- Dealing with influx of cement from Asia/ Middle East
- Logistics challenges

*Pradeep Paunrana, Managing Director  
Athi River Mining Co. (ARM)*

### 11:30 Africa & Chinese Cement: How Far We Can Go?

- Africa: far from the madding crowd amid the world financial crisis;
- A brief history of cement trading as well as investment from China to Africa;
- What are the pros and cons in the process of our trading with Africa?
- Investment into Africa by Chinese cement plants: problems and prospects;
- Looking ahead: how far Chinese cement can go in Africa?

*Charles GUO, Managing Director  
Construction Materials  
Hangzhou Sino-Swiss Investment Management Co., Ltd*

12:05 **Financing the construction of Africa**  
*Zambon Diederick, Head of EIB Office, Tunisia  
European Investment Bank*

12:40 Discussion followed by Lunch

### 14:10 Construction Industry Outlook in South Africa – Is There Life After 2010?

- The global credit crunch causing high altitude turbulence
- World Cup 2010 - The foundation of a nation's dreams
- Beyond 2010 – Back to the basics: Economic - and Social Infrastructure
- Demand for cement & building materials meeting domestic consumption?

*Pierre Blaauw, Chief Economist  
South African Federation of Civil Engineering Contractors (SAFCEC)*

### 14:40 Cement Market Outlook in i) Mozambique

*Nuno Antonio Maposse, Investment Projects Director  
CPI- Centro de Promoção de Investimentos (Investment Promotion Centre) of Mozambique*

### ii) Angola

### 15:10 Macro-Economic Outlook in Africa

• Political analysis & economic forecast  
*Prof. Taoufik Rajhi, Office of the Chief Economist  
African Development Bank*

15:40 Discussion followed by Refreshment

### 16:10 Cement Trading & Logistics Challenges in Sub-Sahara Africa

*Bulent Kahyaoglu, General Director – West  
HC Trading*

### 16:40 Freight Market - The Roller Coaster Ride Continues

- Investigating the Collapse of the Dry Bulk Index in 2008

- Expectations for the bulk market in 2009/2010 and how cement
- freight is affected by outside influences beyond our control
- Overview of the cement trading routes into Africa

*Dimitrios Georgantis, Cement Logistics Manager  
Howe Robinson & Co. Ltd, London*

### 17:10 Trade Finance Challenges in Africa

17:40 Discussion followed by End of Day One

1745 -1900 hrs. *Networking Reception*  
for Speakers & Delegates

## Day 2 - Wednesday, 29 April 2009

9:00 Chairman's Introduction

### 9:05 Libya – Threatening Over-Supply of Cement?

- General Market Conditions
  - Raw Material and Fuel Situation
  - Demand, Distribution and Logistics
  - Current Production Capacities
  - New Investments and Expansions
- Mag. Michael Oppermann, Commercial Director  
Libyan Cement Company*

### 9:40 Prospect of Cement Market in Tunisia

- Demand/supply outlook
- Domestic production capacities & trade flow
- Project investment update
- Fuels & raw materials issues
- Challenges ahead

*Mustapha Nouri, Quality Director  
CIOK*

10:10 **Alternative Fuels Usage in Cement Production - Case Study**

Marc Lambert, CEO  
Dr. H.W. Meyer, Technical Director  
**PEG S.A.**

10:40 Discussion followed by Refreshment

11:10 **Ciments De L'Atlas : New Entrant in Moroccan Cement Market**

- Cement market outlook in Morocco
- Investment & project update

Adil Chennouf, Development Director  
**Ciments de l'Atlas**

11:40 **Development of Cement Market in i) Egypt**

Tarek Elba, Commercial Director  
**Egyptian Cement Company - ECC**

ii) Algeria

12:10 **Cementitious Materials – Applications & Benefits for the Cement Industry**

- Supply/Demand in North Africa
- Case Study – Algeria/Tunisia
- Logistics – Challenges and Opportunities

Francesco Pezzotti, General Manager  
**BMI Europe srl**

12:40 Discussion followed by Closing Lunch

13:50 End of Conference

**You will network with**

Senior executives/traders from international/regional cement companies, ready-mix concrete companies, pre-cast & building materials companies, cement raw materials suppliers (slag, fly ash, steel, coal), construction/infrastructure/building/equity/research analysts, project financiers/banks, engineering, environmental & CDM consultants, technology & equipment providers, logistics & shipping companies (dry bulk and cement carriers).

## Supplying Africa's infrastructure boom

"Dangote remains committed to its strategy of expanding its operations and building cement factories in Nigeria and across Africa" <http://www.cementchina.net>, 16/12/08

"Pretoria Portland Cement Co., Africa's biggest maker of the building material, said demand for cement in southern Africa will remain "reasonably resilient" because of new and existing infrastructure projects..... The government has boosted spending on road, rail and power infrastructure in preparation for the 2010 FIFA World Cup." <http://www.cementchina.net>, 2/2/09

Mozambique suspended its 10.5% tax on cement imports for the next two years to counter rising building costs. As the construction industry booms, demand for cement has exceeded supply, prompting government worries that the "industry is still not producing enough to satisfy the consumption needs and this has serious implications for the government's public works programme".

*Zambian Economist*, 3/1/09

Against the global recession, Africa's emerging market opportunities may offer much needed light. The infrastructure boom from East to West Africa & North to South Africa has prompted selected governments to suspend import tax on cement to meet local demand. This has created opportunities for cement producers/suppliers/traders/shippers & technology providers. However, what is the impact on domestic cement producers grappling with high cost of production and to stay competitive?

Reconstruction activities & infrastructure boom are creating demand for cement, what is the real capacity required in various countries of Africa from North to Sub-Saharan Africa? Will donor's money continue to pour in to support the growth?

As always, logistics & transportation matter are complex challenges in Africa with its congested ports and poor road/rail connections. How can companies overcome these challenges and what are the respective government's plans to address these issues?

Attend CMT's **Africa CemenTrade 2009** to hear from our leading panel of industry experts on key issues in expanding into Africa's cement market. This will be an excellent opportunity to network with global players & clarify your doubts at one venue.

### Key Reasons to attend

- Assess the real impact of the global credit crunch on emerging Africa
- Hear from leading players on their investment plans & experience
- Learn about cement demand/supply balance in **North, South, East, West Africa, Mozambique & Angola**
- Discover ways to reduce logistics and transportation cost in moving cement/clinker across borders
- Find out what are the problems & prospect of investment into Africa by Chinese cement plants
- Discover how alternative fuels usage in cement production could help reduce production cost
- Assess trade finance credit & learn about the new criteria for lending in a tight credit environment
- Where is the freight rate heading with the collapse of the dry bulk index?
- Network & learn from international panel of experts on penetrating the new frontier – Africa!

**Africa CemenTrade 2009** is the ONLY event you need to attend to chart your strategy for 2009 & beyond. Don't hesitate, register with your team today at [www.cmtevents.com](http://www.cmtevents.com) or contact [grace@cmtsp.com.sg](mailto:grace@cmtsp.com.sg) for more information.



# Africa CemenTrade

28-29 April 2009 | Tunis, Tunisia



**AIR MAIL**

Please fax us the completed registration form

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### Venue for CMT's AFRICA CemenTrade

Tunis is the vibrant modern capital city of Tunisia. Situated on the Mediterranean coast the charming city with its grand French avenues and old town structures is a popular destination for tourists and businesses alike. Its expanding economy reflects the consumer demand of the affluent middle class in the North African region... Tunis appeal lies in its varied commercial and industrial activities with growing international investments attributed to its stable political and administrative life in the country.

Growth of the Tunisian economy in recent years is reflected in the booming development of the outer city where one can clearly see the social challenges brought about by rapid modernization. International hotels and medieval bazaars juxtapose with warm welcoming people.

### HOW TO REGISTER

By Internet: [www.cmtevents.com](http://www.cmtevents.com)  
 By Email: [sasha@cmtp.com.sg](mailto:sasha@cmtp.com.sg)  
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### FEES

The full Registration Fee includes cost of all sessions, luncheon, coffee/tea & documentation.

Conference Fee for 1 Person	Conference Fee for 3 or more* (from the same company)
USD1,595	USD1,295 (MIN SAVINGS OF USD900)

\* Terms and conditions apply.

**Cancellations, Refunds & Transfers:** A full refund will be promptly made for all written cancellations 3 weeks before the meeting. Thereafter, cancellations are not refundable. A substitute may be made at any time.

### PAYMENT

By Telegraphic Transfer

**Account Name:** Centre for Management Technology  
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TT must include additional USD21 for Beneficiary's Bank charges. Delegates must bear all bank charges and local taxes (if applicable). Fees must be NETT of ALL charges.

### CONFERENCE VENUE

CMT has arranged special discounted room rate at 324 TD (Superior Single) per room per night only (subject to room and rate availability) for delegates at **Sheraton Tunis Hotel & Towers**. Daily Buffet Breakfast is at additional 26 TD per person upon consumption at "l'Olivieraie". Please reserve your room with the hotel directly, providing full credit card number and expiry date to:

Feriha Bizid, Sales Coordinator  
**Sheraton Tunis Hotel & Towers**  
 Avenue de la Ligue Arabe, BP 345  
 Tunis Carthage Cedex 1080, Tunisia  
 Tel: 216 71 782100  
 Fax: 216 71 782202  
 Email: [feriha.bizid@sheraton.com](mailto:feriha.bizid@sheraton.com)  
 Cut-off date: 27 March 2009

Photocopy Registration Form to Preserve Brochure Copy. April 2009

CMT'S UPCOMING EVENTS

# 11th Asia CemenTrade

KUALA LUMPUR | 23-24 March 2009

*How Deep is the Crisis and How Fast is Recovery?*

# CARBONWorld Doha

DOHA, QATAR | 27-28 April 2009

*"Increased opportunities for CDM projects in the Gulf region and its participation in the global carbon trade"*

**CUSTOMISED SPONSORSHIP PACKAGES AVAILABLE** - This event is an excellent platform to promote your organisation to influential players and investors in the industry. Sponsorship opportunities available include Corporate, Exclusive Luncheon, Cocktail & Documentation sponsor. Exhibition / catalogue display can be arranged upon request. Contact [cynthia@cmtp.com.sg](mailto:cynthia@cmtp.com.sg) or (65) 6346 9132.