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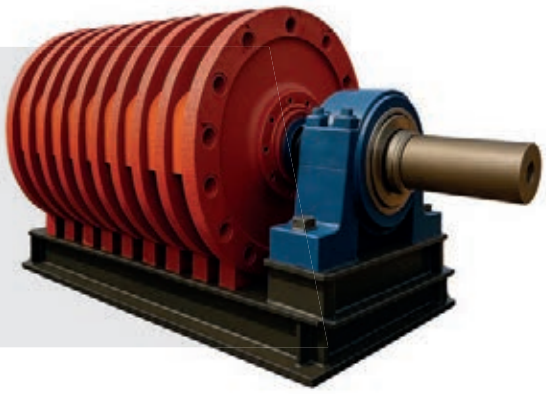

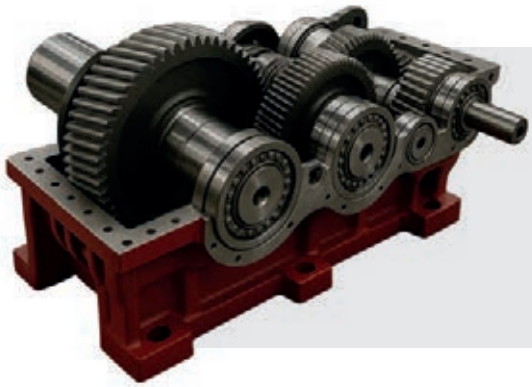

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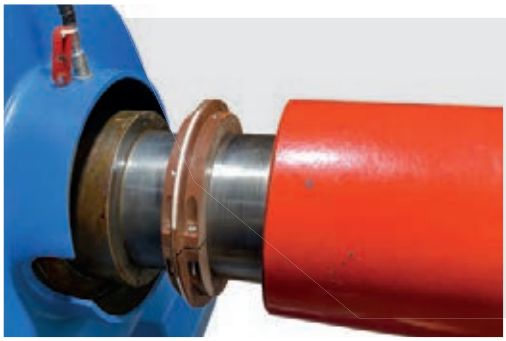

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Dear readers,

Welcome to the May 2026 issue of *Global Cement Magazine* - the world's most widely-read cement magazine! This issue will be distributed at the inaugural *Global CementAI Conference* in Brussels, Belgium, on 19-20 May 2026. It is also the second of two issues that will be distributed at the IEEE-IAS/ACA Cement Conference in Fort Lauderdale, Florida, US, on 26-29 April 2026.

As in April 2026, this issue is fully-loaded with US-centric content. Most prominently, we join ACA President and CEO Mike Ireland to look back on almost a decade as head of the organisation (Page 44). Mike, who will retire shortly after the event, assesses how the US cement sector has changed over the past 10 years, highlights what he sees as his greatest achievements in the role, and offers advice to his - as yet unnamed - successor. To complement these perspectives, we also hear from the ACA's Market Intelligence Leader Brian Schmidt (Page 50) and Ed Sullivan from The Sullivan Report (Page 54), both of whom discuss the US cement market - and how rapidly-changing geopolitics could affect them in the coming months. There's also another 'outsider's' view of the US cement market, this time from Peru's UNACEM (Page 58), plus handy programme and exhibition guides for the main event in Fort Lauderdale (Pages 62-69).

Elsewhere, there are technical features on bypass dust (Page 18) and valves (Page 24), plus an interview with Kemex-Ingesoa, the Spanish bulk handling expert (Page 15) and a report from the recent Cement Alliance Summit in Germany (Page 38). Last, but by no means least, Loesche CEO Rüdiger Zerbe gives a rare interview. Turn to Page 10 for more.

See you in Florida and/or Belgium... and enjoy the issue!

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Interview by Peter Edwards, Global Cement Magazine

THE NEW LOESCHE

Rüdiger Zerbe, CEO of Loesche, discusses the company's past, present and future in a rare interview...

***Global Cement (GC):* Please can you introduce Loesche to our readers?**

Rüdiger Zerbe (RZ): Loesche was established in 1906, so we have been in business for 120 years. It started with Curt von Grueber, who obtained the European sales rights for the new US-designed Kent mill. Small by today's standards at 5t/hr, it was a big deal at the time. Von Grueber later took on the rights to the Maxecon mill, which included a classifier.

Ernst Curt Loesche joined the company in 1912 and became sole owner when von Grueber left in the mid 1920s. The first Loesche-branded mill was launched in 1927. At the same time, Loesche grew internationally by exporting complete cement plants with vertical kilns to Asia and South America.

Ernst Guenter Loesche, the second-generation owner, introduced the first VRM for raw meal in the 1960s. At this time, mill manufacturers were under pressure from rapidly-expanding pyroprocessing lines. Loesche responded by producing the first four-roller mill in 1971, with a capacity of more than 200t/hr, later expanding to 400t/hr in 1975.

In 1984, Dr Thomas Loesche became the third generation business leader. At this time, Loesche set another record, with a 750t/hr raw meal VRM for a cement client in Thailand.

In 1993 Loesche started to sell the first slag and cement mills based on its patented design. In 1999, volcanic ash was used as a supplementary cementitions material (SCM) at a Peruvian cement plant, reducing the clinker content to 50%. Loesche has since developed the LM 69.6 with raw meal throughputs of up to 1200t/hr, selling 14 around the world. Now, in 2026, the company has more than 800 employees all around the world. It had a 50% market share for grinding in the cement sector in 2024.

***GC:* What is the company's mission?**

RZ: I spoke with Thomas Loesche about this recently. He said, without hesitation, that Loesche's mission is to develop technologies that support key industries to be sustainable. This translates to sustainability in energy use and resource use. By extension, our products help reduce emissions, while saving money.

Render of a Loesche Compact Cement Grinding plant.

Rüdiger Zerbe joined Loesche GmbH as Group Managing Director and CEO in 2015, where he works closely alongside the third-generation owner Thomas Loesche. Before joining the company, Zerbe spent 22 years in the steel equipment sector, many of them with SMS Group. A mechanical engineer by training, Zerbe is an expert in process technology and global plant building, with a Masters from the University of Kaiserslautern, Germany.

***GC:* How does Loesche carry out this mission?**

RZ: While our 'DNA' is grinding, we have, over the past 10-15 years, begun to consider how this area affects other parts of the plant. What do the quarry, pyroprocess and despatch sections need from the grinding sections? We have invested heavily in research and development to answer this question.

In 2009 Loesche sold three complete cement lines in Brazil, which are still the biggest in South America. We are happy that we could acquire the Austrian pyroprocessing expert A TEC in 2012. We also invested in cement process modelling and AI expert aixprocess, based in Germany, in the same year. We added bulk handling solutions manufacturer MHC Industries in 2017 and plant management platform developer kingsblue in 2020, both from Germany. This was followed by the Brazilian alternative fuel (pyro)processing expert Dynamis in 2022, India's Imco Composites in 2022 and large cylinder supplier Ruhfus in 2023. There are regional subsidiaries too, including in key cement markets like China, India, the US and Europe.

Each of our 19 group companies is responsible for its own operations because we believe in an entrepreneurial culture. Each knows its own field intimately, but they share the same values and, of course, work together for the benefit of our clients.

Most recently, we entered into a partnership with the mining equipment company Metso. It already offers a full range of equipment and services for mining companies, from comminution to flotation and services. They needed a partner with expertise in dry grinding. Mining is a huge untapped sector for Loesche and one that will become ever more important over the rest of the 21st Century.

***GC:* What about new technologies developed by Loesche?**

RZ: Of course, we continue to develop our core competency of grinding. Most recently we have been doing so via our GreenKey Solutions, each of which looks to develop a different area of sustainability. C/Clay, S/Crete, E/Slag and U/Fines are in the area of SCMs. Each of these aims to reduce the clinker factor – and hence CO_2 emissions – of cement products. This is increasingly important given that fly ash and slag are expected to become more scarce.

C/Clay looks at how Loesche's technology can be used to facilitate the development of LC3 cements containing clinker, limestone and calcined clay. It

Loesche's GreenKey Solutions.

draws on elements of our grinding and pyroprocess expertise. Dynamis, with calcined clay references worldwide, is heavily involved in this area of research alongside a new Loesche clay testing facility at the IAB institute in Weimar, Germany. There are numerous technologies being developed for calcined clays.

S/Crete looks at how recycled concrete can be processed and used as an SCM. E/Slag looks at efficient grinding of slags. U/Fine looks at how each of these new SCMs could benefit from grinding to higher-than-usual fineness levels. This is a very exciting area of research for the company.

Away from SCMs, another huge area is alternative fuels, which is addressed under the A/Fuel GreenKey Solutions banner and handled by A TEC. We also launched our D-Gasifier, a biomass gasifier in 2025. We're not shying away from new areas.

We also have the C/Guard GreenKey Solution, which is looking at how Loesche's technologies will interact with CO_2 capture solutions, particularly on the pyroprocessing side but also in the grinding of fuels, for example in the A TEC Rocket Mill® for AF. C/Guard is still in its early days, but it will be crucial to help fit our existing solutions to future technologies like syngas, oxyfuel burners, hydrogen and more.

***GC:* What is behind Loesche's diversification drive?**

RZ: Loesche is responding to the needs of the global cement market. It is calling for better integration within its process so that it can meet its sustainability goals. The cost of emitting CO_2 is already a reality in Europe and some other markets. Costs will only rise and come to new markets in the future. It is in the industry's interest – and Loesche's interest – to develop new solutions now so that the challenge can be met.

***GC:* How important are the different areas of the business?**

RZ: Loesche has a turnover of around €350m. Around 40% is from grinding equipment sales, with the rest from new process technologies and from servicing.

***GC:* How else is the company changing?**

RZ: Thomas Loesche has now been the 'anchorman' of the company for more than 40 years, so he is bringing in the fourth generation to the company: his sons Alexander and Constantin. Alexander is Chair of Loesche India and Constantin is involved in strategic projects. They have a bright future with the company - and the company has a bright future with them taking a greater role.

***GC:* How does Loesche use AI?**

RZ: There are several options. We could look to automate and streamline some repetitive functions, for example in accounting and human resources. There are also great opportunities in supply chain management, which is increasingly challenging at present due to the ongoing conflicts and geopolitical issues. Many companies are doing these kinds of things, regardless of their main business.

For Loesche's business, the main use of AI is found in aixprocess, which is developing AI to improve pyroprocess efficiency. It is looking, for

Thomas Loesche (right) and his sons Alexander (left) and Constantin (centre).

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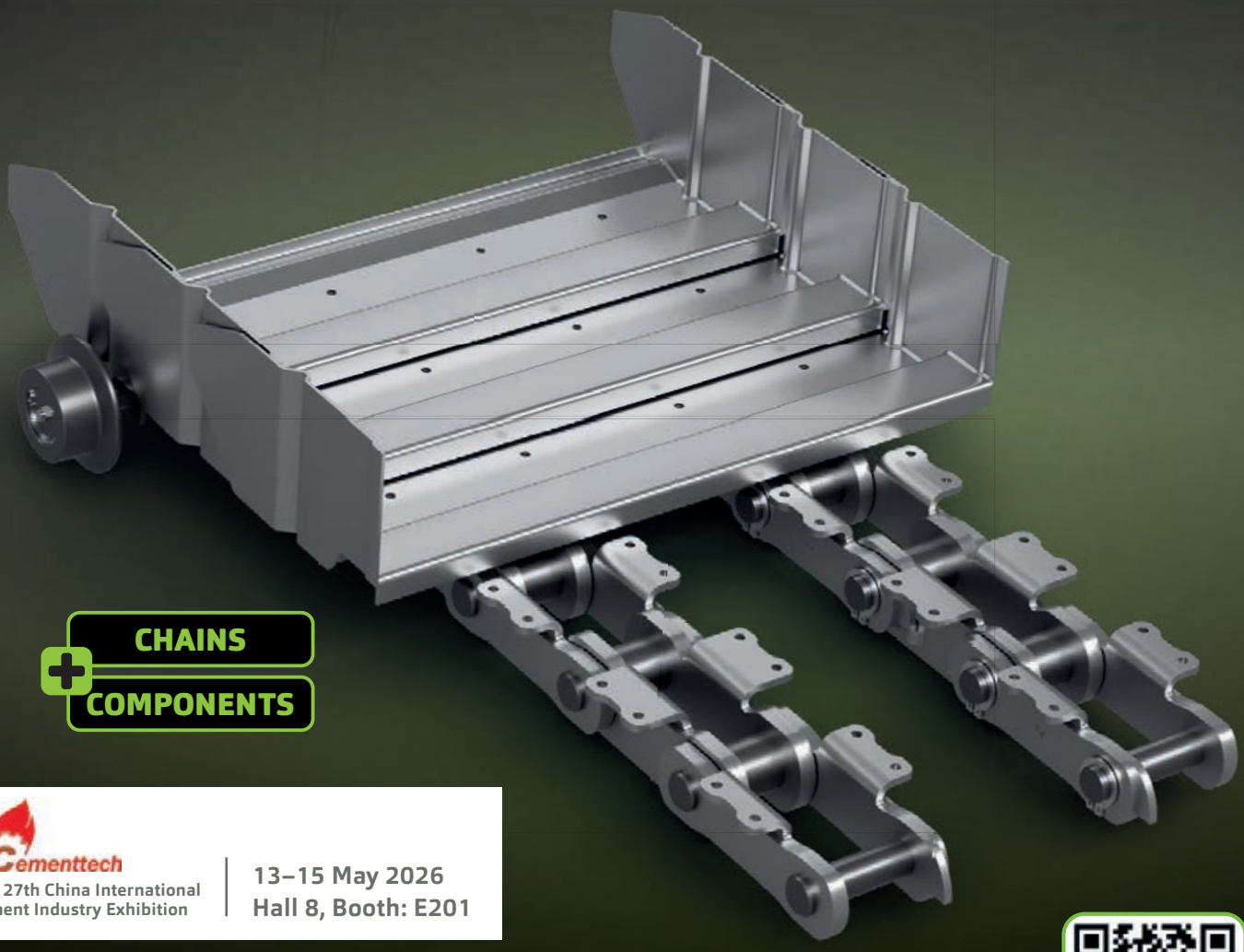

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example, to use visual AI to monitor and optimise flame shapes when burning AF. Looking at our core competency of grinding, we are developing our Dynamic Assistant to facilitate a constant increase in operation efficiency.

More broadly, I would say that we know that AI will impact the way the world does business and how the cement industry operates. However, it is unclear which areas will be most affected and how large the impact will be. There are 5-10 applications that Loesche might be able to use AI for, but there's limited clarity as to whether the capabilities being discussed will be realised. Loesche is very keen, however, to leverage these new technologies and continue to set new trends.

***GC:* You just mentioned wars and geopolitical issues. How are these affecting Loesche's activities?**

RZ: There are two issues. One is the US tariffs. These affected our business, especially at first, but we have adjusted our supply chains to accommodate this new reality. The more concerning issue is the proliferation of conflict, particularly the complicated conflict between the US, Israel and Iran. Loesche has a lot of contracts in the Middle East and it is currently unclear if these will be affected, to what extent, and for how long. At the moment, things are stable enough to continue in most cases, but the situation remains uncertain.

***GC:* How can Loesche maintain its competitive edge in the face of new suppliers to the industry?**

RZ: Over the past 20 years, Loesche has worked closely with the large Chinese cement plant manufacturers to develop long-term partnerships. This has served both parties well, as we can jointly deliver well-priced cement production lines, with high-quality critical components from Loesche.

Nowadays, the Chinese suppliers are entering into the mill space to a greater extent, while Loesche is also expanding. In the face of this, Loesche must continue to improve its solutions so that we can maintain our technical advantage. We must also ensure that we can deliver solutions in a timely manner. Sourcing is very important.

***GC:* What else could threaten Loesche's continued success?**

RZ: We have seen ups and downs in global markets since the beginning of our business 120 years ago. Aside from unpredictable geopolitics, we may struggle in project funding via export funding. In many cases, particularly in developing markets, there's state funding to subsidise new projects overseas. It can be extremely challenging for European suppliers to compete in such cases, as we can currently see from the decline of some major European plant building companies. Fortunately we, as Loesche, are financially very sound.

***GC:* What are Loesche's biggest advantages in the face of these challenges?**

RZ: The biggest advantage for Loesche is that it is a long-standing family-owned company. It is large enough to weather storms like Covid-19, but is small enough to respond flexibly as new challenges arise. Key decisions are taken quickly by a small team that is passionate about the company.

They rely on our biggest advantage - our 800 colleagues around the world. The company's hierarchy is not a pyramid. It is very flat. We encourage all businesses, departments and individuals to think for themselves and bring their best, whatever their specialism. This allows people to thrive in the company – and directly impacts our performance, both for our clients and for the bottom line.

Finally, we are stepping up our engagement with the industry, including via interviews like this, to show that we are no longer just a grinding expert. Loesche is a sustainable process technology expert with expertise in the technologies that will transform the cement industry in the coming decades.

***GC:* Thank you for your time today Mr Zerbe.**

RZ: Thank you – It was great to take part in this first interview with *Global Cement*!

A Loesche flash calciner for clay at the IAB in Weimar.

Interview by Jacob Winskell, Global Cement Magazine

KEMEX-INGESOA: 40TH ANNIVERSARY

On 25 April 2026, Kemex-Ingesoa will celebrate the 40th anniversary of the original founding of Kemex, a materials handling equipment supplier to the cement industry, at its headquarters in San Sebastián, Spain. Kemex today operates under the Kemex–Ingesoa brand, as part of Vidmar Group.

***Global Cement (GC):* Please would you introduce Kemex-Ingesoa?**

Javier Torres (JT): Kemex-Ingesoa is a Spanish engineering and manufacturing company that specialises in bulk solids handling and processing systems for the cement, chemical and mining industries. The history of our first 40 years is as follows:

1986 – Kemex is founded by engineers specialised in cement plant materials handling, focusing initially on conveying and storage systems for cement production;

1990s–2000s – Expansion of proprietary technologies; diversification into chemicals and mining;

2010s – Consolidation as an international supplier and increase in turnkey project capabilities;

2022 – Kemex buys Ingesoa, a historical competitor, and Kemex-Ingesoa is born as one company, retaining both brands.

Today, Kemex-Ingesoa's offering includes pneumatic and mechanical conveyors; silos and storage technologies; loading, despatch, and ship-loading systems and dust filtration and gas treatment technologies. We operate internationally through a combination of direct projects, long-standing clients and local representatives. We take an engineering-driven approach, emphasising collaboration with clients, customised, problem-driven engineering and reliability. A notable recent milestone for us was supplying and upgrading pneumatic conveying systems for national cement facilities in Paraguay, Peru, Morocco and Spain.

As part of Vidmar Group companies, the group continues to grow. In 2026 it is integrating the engineering company Lurbino Ingeniería and agri-food equipment manufacturer Caoler Agro Industrial as part of its diversification strategy.

***GC:* How does Kemex-Ingesoa operate?**

JT: Kemex-Ingesoa's operating model combines proprietary equipment design, systems engineering, equipment manufacturing (through outsourcing and in-house coordination), project-based supply, turnkey and semi-turnkey execution and after-sales technical support. We do not operate as a mass equipment manufacturer – rather, our solutions are adapted to specific plant layouts, materials, capacities, and operating conditions. Our Engineering & Design operations consist of:

1. Process Engineering – Our operations start with process definition, typically including material characterisation, capacity definition,

Kemex-Ingesoa's offering includes pneumatic conveying and loading systems. **Source:** Kemex-Ingesoa website.

Javier Torres is general director, sole administrator and co-owner of Kemex-Ingesoa. Torres' background is in sales engineering, including as sales manager at Vidmar Group and sales representative at Mexico-based distribution company Toroda Imports. Torres holds an Engeering degree and a Master's degree in Industry 4.0 and Digital Transformation from the Valencian International University in Spain.

conveying distances/elevation profiles, operating pressures and air requirements for pneumatic systems and interfaces with existing plant equipment. This determines whether the optimal solution is: dense-phase pneumatic conveying, medium/low-pressure pneumatic conveying, mechanical conveying or hybrid systems. Kemex-Ingesoa frequently retrofits or replaces existing systems while maintaining plant operation.

2. Mechanical & Equipment Design – Encompassing components for the entire materials handling process, from screw pumps and pneumatic feeders to aerated conveying systems, air slides and aeroglide systems.

***GC:* How has materials handling changed?**

JT: Over four decades, bulk solids handling has transformed from mechanical transport to engineered process systems; from dust-prone, failure-heavy operations to enclosed, controllable, compliant systems and from 'secondary' plant equipment to a core determinant of efficiency, safety and sustainability.

***GC:* What markets are most promising today?**

JT: Kemex-Ingesoa's strongest opportunities lie where complex powders, harsh operating conditions, regulatory pressure and long asset lifecycles converge. Despite maturity in some regions, the cement industry remains Kemex-Ingesoa's most defensible and profitable market. Cement remains one of the most difficult bulk solids to handle, as it is fine, abrasive, cohesive and variable. The cement industry is undergoing its largest transformation in decades, driven by CO_2 reduction targets and circular economy regulations. Projects are increasingly brownfield, while alternative fuels (AF) and supplementary cementitious materials (SCMs) are increasing system complexity and generating conversion projects – a fast-emerging market for us.

Plant retrofit markets include Latin America, with its ageing cement infrastructure and continued infrastructure development, and the Mediterranean region, with decarbonisation-driven technical demand, lower volumes and good margins. Meanwhile, Africa's strong cement demand and mix of new plants and upgrades requires careful partner selection to realise upsides against high execution risk.

Other opportunities include a high-growth niche in cement terminals and logistics infrastructure, amidst supply chains fragmentation and increased use of coastal and inland terminals. These are dust-sensitive settings, requiring enclosed systems that are highly reliable with intermittent operation, integrating silos, pneumatic conveying, loading spouts and filtration. These projects are often smaller than full plants, faster to execute, technically demanding and less price-driven than 'commodity' equipment – another strategic fit for Kemex-Ingesoa.

***GC:* How is Kemex-Ingesoa supporting cement industry decarbonisation?**

JT: Our contribution is indirect but structurally critical: we make new, lower-carbon production pathways physically and operationally viable. In modern plants, decarbonisation largely depends on what materials can be handled, how reliably, and at what cost: most decarbonisation initiatives fail not in the lab, but at the silo, conveyor, or transfer point. Kemex-Ingesoa operates precisely at that constraint.

***GC:* What are Kemex-Ingesoa's goals for the next 40 years?**

JT: Our long-term goal is not to grow fast or dominate markets, but to remain essential. Over the next 40 years, the company aims to deepen its role as an engineering specialist - particularly in cement - by preserving its independence, technical authority and accumulated know-how, while adapting carefully to new materials, regulations and operating realities.

***GC:* Thanks for talking to us today, Javier.**

JT: You are very welcome!

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Dr Stefan Kern, A TEC

INNOVATIVE BYPASS DUST TREATMENT

An account of the A TEC ReduDust system at Ssangyong Cement's Donghae plant in South Korea.

To minimise the environmental impact caused by the cement manufacturing process, huge efforts are being made to reduce CO_2 emissions via fuel flexibility. Alternative fuels (AFs) now play a key role. Solid recovered fuel (SRF) and refuse-derived fuels (RDF) play a major role. However, in many cases this fuel stream contains a significant amount of chlorine (Cl), which has negative impacts on the pyroprocess.

This is because the temperature in the sintering zone is above the evaporation temperature of KCl and NaCl, which then condense at lower temperatures in the preheater section of the plant. This causes an internal, highly loaded alkali cycle to form between the kiln and preheater/calciner.[1] The Cl-cycle builds up to an equilibrium where the only output - in the absence of a Cl-bypass - is the clinker. High Cl values, especially in the presence of sulphur, lead to the formation of blockages in the lower preheater section, meal piles and kiln inlet chamber, eventually halting production.

Introducing the chlorine bypass

Figure 1 shows how the concentrations of chlorine and sulphur in the hot meal lead to coating behaviour in the pyroprocess. It is thus important to control and relieve the internal Cl cycle by use of a Cl-bypass system.

A TEC was a pioneer in the field of chlorine bypass systems and has supplied more than 50 such systems worldwide. It has been found that, in typical kiln systems, the chlorine evaporation in the kiln is between 95-99%, resulting in possible chlorine purge of only 1-5 % of the internal cycle, while 95-99% of the Cl is present as a gas in the kiln inlet chamber. The high concentration of Cl in the kiln inlet

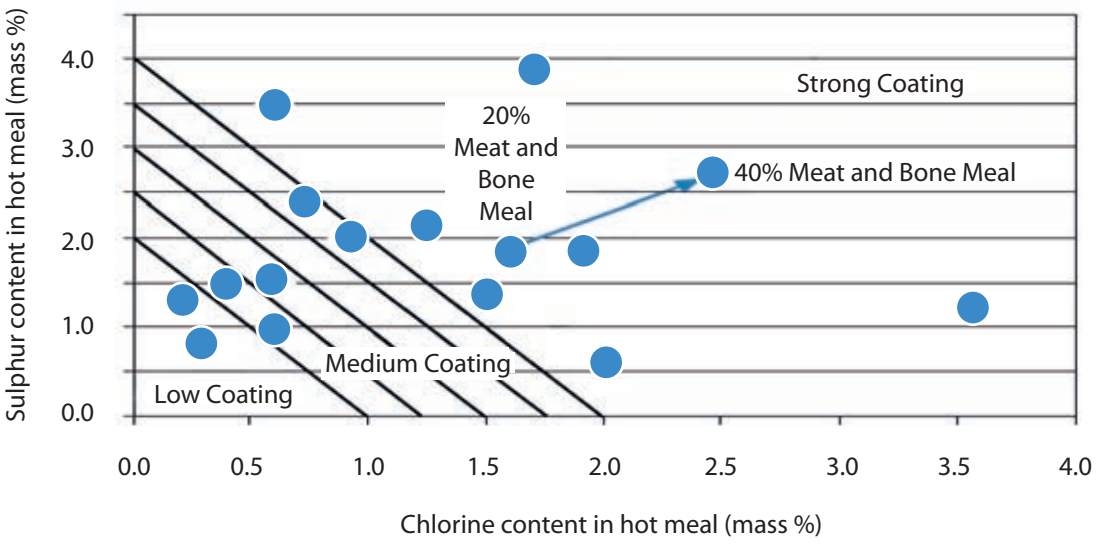

Figure 1: Influence of the combination of chlorine and sulphur in the hot meal on the formation of coating and blockages in the pyroprocess. **Source:** VDZ.[5]

chamber is the reason why a comparably small amount of removal of the kiln gas (typically 5-15%) as bypass gas is sufficient to relieve the Cl cycle, resulting in lower Cl concentrations of hot meal and even in the clinker.

The removed gas is quenched with fresh air or process gas to below the alkali condensation temperature and further to a temperature suitable for the bypass filter inlet, where the Cl-containing dust is separated. A gas bypass system therefore represents the state-of-the-art solution. It is the most efficient solution to control high Cl inputs in the pyroprocess.

A highly-efficient bypass system is typically characterised by comparably high Cl concentrations and limited amounts of bypass dust, while achieving reliable operation and low energy consumption. Proper design of the gas take-off and gas quenching, where A TEC has developed a well-proven quenching chamber, is crucial to this process (Figure 2).

Bypass systems come with the question of how to use the bypass dust produced. It contains the removed Cl and alkali compounds as KCl and NaCl salts. EN 197 limits the Cl content in the clinker to 0.1% by weight, which limits the use of bypass dust in the clinker. Residual bypass is typically landfilled.

To create a waste-free Cl bypass solution, A TEC has developed the ReduDust process, which contains several patented processes to remove the salts from the bypass dust. This makes it possible to re-use the bypass dust in the cement manufacturing process, while producing KCl and NaCl (or a mixture of both) at the same time.[2-3]

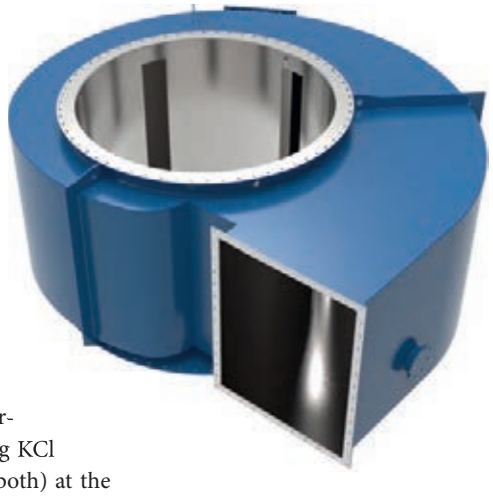

Figure 2: 3D illustration of the A TEC quenching chamber, a key piece of equipment in the chlorine bypass.

ReduDust at Ssangyong Cement

A new ReduDust plant was installed to treat the bypass dust at Ssangyong Cement's Donghae cement plant in Gangwon Province, South Korea, by A TEC Production & Services GmbH between 2019 and 2021 (Figure 3). The plant site is remarkable, as it is one of the world's largest cement plants, with a clinker capacity of 11.5Mt/yr from seven lines.

Figure 3: New ReduDust plant at Ssangyong Cement in Donghae during the construction phase.

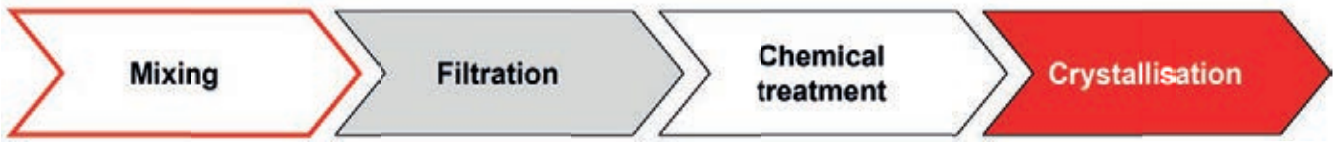

Figure 4: Main process steps in the A TEC ReduDust process.

Figure 5: Vacuum belt filters with multi-stage washing for separating the dust from the brine.

The Donghae plant already uses a remarkable amount of AF. Indeed, several kiln lines have a Cl input of more than 1000g/t of clinker from AF. Most have Cl-bypass systems but, due to the limited amount of bypass dust that can be used in its cement, excess bypass dust had to be disposed of at comparably high costs. In order to create a waste-free bypass solution and use the bypass dust as a valuable resource for KCl salts, the plant management team decided to install an A TEC ReduDust system.

Component (%)	Min	Mean	Max
SiO_2	3.3	6.4	11.0
Al_2O_3	1.5	2.5	4.2
Fe_2O_3	0.0	0.5	1.1
CaO	12.8	25.4	40.7
MgO	1.3	1.9	2.5
K_2O	15.4	22.2	27.5
Na_2O	0.5	0.9	1.5
SO_3	3.2	5.5	8.8
Cl	11.2	18.3	28.2
LOI*	36.4	48.7	57.1
Free CaO	10.4	15.1	20.5

Table 1: Composition of the bypass dust at the Donghae cement plant.

* = Loss on ignition.

The ReduDust system at the Donghae plant was scaled to handle 30,000-40,000t/yr of bypass dust, which is about 50% more than the first-ever industrial A TEC ReduDust plant at the CRH Rohoznik plant in Slovakia (formerly owned by Holcim).[4] The plant was designed to produce KCl salts with an integrated crystallisation stage using heat from the plant's waste heat recovery (WHR) system.

Project development and description

Bypass dust consists of two main components: 1. Partly-decarbonised kiln feed; 2. Potassium salts with some sodium and sulphate. The partly-decarbonised kiln feed is not very soluble in water but the potassium salts are highly soluble. Table 1 shows the bypass dust analysis considered for the process layout, while the design point has been fixed for a bypass dust with a Cl content of 20%. The four main steps are shown in Figure 4:

1. Mixing of bypass dust with water to produce a suspension of brine and dust particles;

2. Filtration of the suspension to separate salt brine and the particles (cleaned bypass dust);

3. Brine conditioning to prepare it for crystallisation (depending on the requirements);

4. Crystallisation to produce potassium salts.

By mixing of the bypass dust with water in step 1, the salts are dissolved in the brine. Simultaneously, free lime in the bypass dust is hydrated to lime hydrate, resulting in an increase in the temperature of the brine. A key aspect of A TEC's system is the use of an appropriate water/bypass dust ratio which is adjusted to the dust properties and only possible with careful process control.

The suspension is separated from the non-soluble components in a multi-stage filtration and washing step (Figure 5). It is essential to investigate the specification and physical properties of the bypass dust so that this process step can run continuously while extracting the maximum amount of Cl.

After the filtration step, the cleaned bypass dust


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Figure 6: Filter cake (cleaned bypass dust) at the outlet of the vacuum belt filter.

(Figure 6) is available as filter cake that contains less than 10% residual Cl and salt components. The heavy brine is used to produce salts. The products out of the crystallisation step are the salt and the condensate, which is reused as washing water and source for the mixing step.

To prepare the heavy brine for crystallisation, it is prepared in the brine conditioning step, which is proprietary to the ReduDust process. Typical steps include, but are not limited to, heavy metal precipitation, gypsum control and pH-value adjustment, depending on the requirements of the salt. The main design consideration in this step is the economy of this process, including using limited amounts of standard consumables, such as HCl for pH adjustment. Precipitation of calcium ions can also take place during this step. Separated calcium and heavy metals can be returned to the filtration step to end up in the filter cake, but can be removed in a separate stream.

The conditioned brine, handled in various storage tanks for continuous operation as shown in Figure 7, contains mainly potassium chloride with some sodium and sulphate salts and heads to the final step, crystallisation.

The different solubility of KCl and NaCl at different temperatures can be used to produce these two salts separately in a two-stage vacuum heat evaporation system. Two single evaporator systems are connected as shown in Figure 9. The vapour from the first evaporator is used as steam heat for the second evaporator, which operates at a lower pressure and temperature. Due to internal slurry recirculation between the two systems, a salt fraction can be extracted. Due to the specific conditions inside a cement clinker kiln, this is mainly potassium chloride, with a minor fraction of sodium chloride.

The ratio of sodium to potassium at the Donghae plant is below 5%, often around 2%. That's why, at the Donghae plant, only one high KCl containing salt fraction is produced. The K_2O content in the salt made at the Donghae plant is typically >60%, which is near the value of natural KCl salts. The moisture is <0.5% and the grain sizes in a useful range.

This is economically favourable, as potassium chloride has a higher market value than sodium chloride. Therefore the waste problem of bypass dust is eliminated and a cost (disposal fee) is transformed into a benefit (the income from salt sold).

The heat source for the crystallisation step is the plant's waste heat recovery system (WHR), to which the ReduDust plant is connected. The salt is dewatered in centrifuges and optionally dried.

Figure 7: Handling and storage tank for the brine to allow continuous operation of the crystallisation step.

Results and outlook

Successful restart and commissioning were carried out in the winter of 2020-2021. The operational results confirmed the process values calculated before and showed even

further improvements on all sides. Summing up, the observed results were:

1. Plant capacity for 30,000-40,000t/yr of bypass dust being used in the plant;

2. Cl removal efficiency from bypass dust to filter cake was >95%;

3. Salt properties: K_2O ~ 60%, moisture <0.5%, grain size d_{50} ~0.4mm, max. 2mm;

4. Heavy metal contents are below limit values.

The ReduDust process is a well-proven solution for bypass dust. Thanks to its modular concept, it can be adjusted to the specific requirements of almost any kind of cement production processes. Ordinary kiln dust and/or other chlorine-containing solid powders can be treated in addition to bypass dust. The process is based on standard technologies (pumps, valves, etc.) and on basic industrial chemicals, which makes it easy to implement, maintain and operate ReduDust systems all over the world.

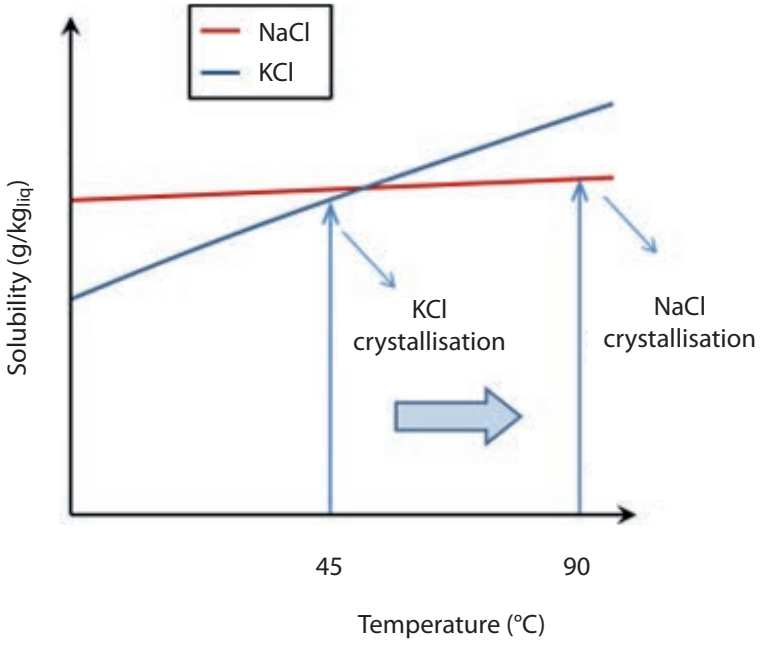
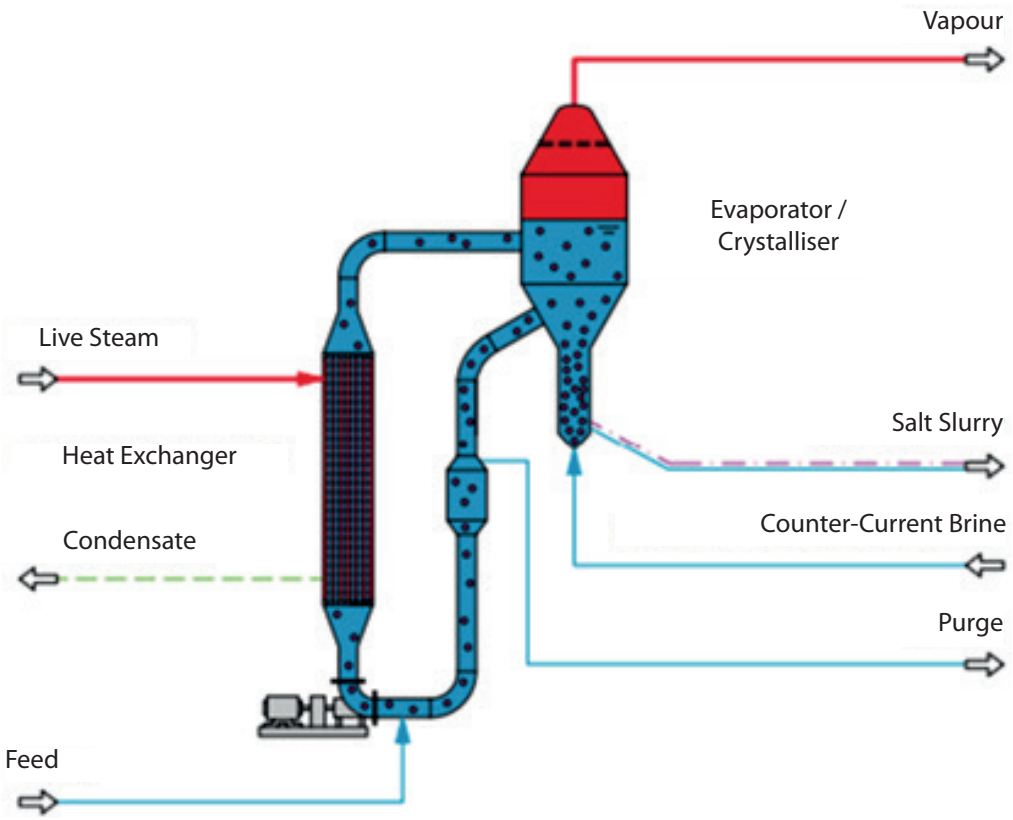


Figure 8: Solubility diagram for NaCl and KCl and their crystallisation in two evaporation stages.

Figure 9: Scheme of an evaporation stage.



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Interview by Peter Edwards, Global Cement Magazine

DECARBONISATION THROUGH VALVES

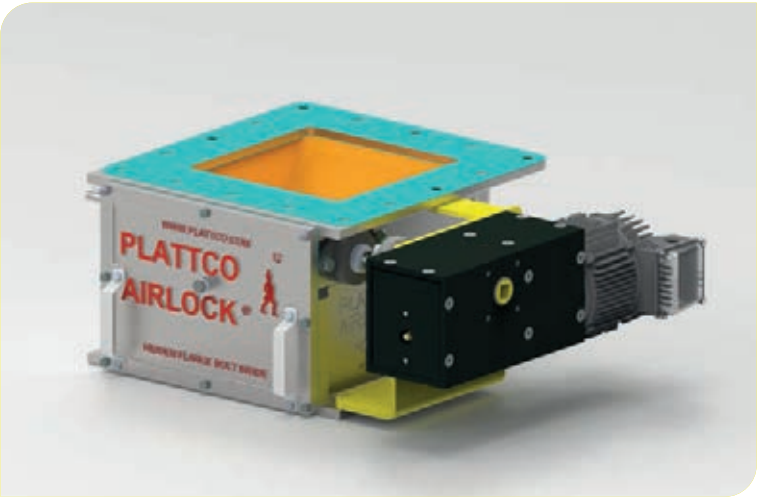
Valves play a crucial yet underappreciated role in the global cement industry, and will do so even more as decarbonisation comes to the fore.

***Global Cement (GC):* Please can you introduce Plattco to our readers?**

Kevin Guay (KG): Plattco is a fully-integrated manufacturing company founded in upstate New York in 1897. It began as a cast iron foundry and was, in the 1930s, one of the first foundries in the US to license white iron, a class of cast iron materials with high chromium or nickel content. In 1953, Plattco invented the double flap airlock valve, which remains the company's flagship product to this day. It also produces a range of slide gate valves for a range of industries, including cement.

Today, we employ around 60 people, still at the original site. The emphasis has transitioned from 'valve producer' to being a performance partner that focuses on solving critical dry material handling challenges, with the aim of maximising efficiency, reliability and uptime.

***GC:* When did the company first move into the cement sector?**



Half of Plattco's double flap airlock valve, pictured with its new EVA drive system.

KG: Plattco moved into the cement sector in the 1960s when cement plants were being built with clinker cooler technology that needed valves under the wind boxes of the clinker coolers. In the 1960s and 1970s Plattco shipped a lot of double flap airlock valves, to almost every cement plant being built in the US and Canada. We have since sold valves to cement producers in more than 50 countries. In the 2020s, the cement sector is the single most important sector for Plattco, representing around 20% of our annual sales. The cement industry poses some of the biggest process challenges for our customers, so we focus on solving major valve issues in the industry.

***GC:* How do double flap airlock valves function?**

KG: In their simplest form, they are check valves that are powered to open and close with pneumatic cylinders. The valves move dry material volumetrically, while providing an airlock function. The two flaps are positioned one above the other, opening alternately, so that at least one flap is always closed. This allows material, be it raw meal, clinker, cement, alternative fuels (AF) or something else, to enter the next step of the process while only letting the bare minimum of air escape.

Typically, the valves will cycle once every 5-10 seconds, passing anything from 1-100m^3/min, depending on the size of the valve. They can cycle much faster if needed, up to as high as 180m^3/hr, but this would be unusual.

***GC:* What are the advantages of using a double flap airlock valve compared to conventional valves?**

KG: The double flap airlock valve was invented as a replacement for the rotary valve, which were widely used in North America prior to Plattco's founding. Rotary valves are still used widely around the world.

Kevin Guay is a mechanical engineer by training. He joined Plattco in 2005 as a design engineer and moved to the sales team in 2011. In 2016 he returned to the office to work on product development. He was promoted to his current position, Vice President for Sales and Engineering, in 2023.

The headline is that, in our test facilities, rotary valves release about 2.5 times the amount of air that the double flap airlock valve does. And that's when the valves are new. Rotary valves are notorious for being eroded, particularly in abrasive environments like below the clinker cooler wind box. The clearance between the rotor and casing starts to increase immediately as the rotary valve gradually grinds itself to death.

In this application, there are numerous advantages to the double flap airlock valve. The rotary valve allows process air to blow down onto the drag chain, creating a safety hazard. It is also possible that the loss of air will mean that it is not possible to cool the clinker to the correct temperature by the end of the cooler. This means that the operator needs to decrease the depth of the bed in the clinker cooler. If they don't do this, the clinker will be too hot for the belt conveyor, which, in the worst case scenario, could start a fire.

Original flap valve from the 1950s.

Rotary valves also pose issues elsewhere in the plant. Given that they leak, it has been known for material to be retained in hoppers or in cyclones, because the leaking air keeps it suspended. This means that feed rates fall, or material becomes completely trapped.

There are also maintenance issues. Double flap airlock valves can be inspected easily via accessible doors in a short period of downtime. This is in contrast to rotary valves, which are a black-box when it comes to maintenance. Operators know that they are going to fail, but it is impossible to know exactly when. In the unlikely event that there's an issue with the double flap airlock valve, it can be identified and rectified before a catastrophic failure.

***GC:* How are the valves manufactured?**

KG: Plattco manufactures all its valves in house, as it has always done. This starts with casting and continues through state-of-the-art CNC machines to finishing and despatch. We keep some partly-finished valves in stock. These can be partly customised by size and application, with the options for different control systems, voltages and so on, depending on the customer.

Installation is the responsibility of the client or its contractor. Plattco is present for commissioning and, of course, remains on hand to assist afterwards. Many customers, especially in the US and Canada, take advantage of our annual service programmes, which could include in-depth reports of valve conditions to tell customers what's needed to maintain the valves through the next production campaign. This is crucial for operators that have many cement plants, each with up to 50-60 valves.

***GC:* How has the product range developed over the years?**

KG: The first major redesigns of the double flap airlock valve took place in the 1980s when it became increasingly important to shorten the distance between the two flaps. This opened up the valve to use in more cement plants, where space had previously been an issue. In the 1990s, we took those designs and adapted them for higher pressure applications. This meant that the valve could be used at up to 3.5atm, making it applicable for conveying lines and pneumatic conveying systems.

In the 2000s Plattco developed its range of sliding gate valves. It now has five different sliding gate valve series for all different applications in the cement plants and many versions of each series for specific parts of the plant.

***GC:* How does Plattco use AI?**

KG: Plattco is currently developing AI solutions as part of its Electronic Valve Actuator (EVA) technology. This is the company's plan to move valves into the digital age. EVA is Plattco's first-ever all-electric solution, recently patented, and being rolled out right now. It uses electrical power to actuate the flaps, rather than pneumatic systems, which now represent an old technology. The cement industry is moving towards electrification of its equipment to increase efficiencies towards their overall goal of carbon neutrality. Plattco has a clear role to play through the development of EVA. It's really a transformation to how these valves are run, and we see it as a major step forward for the industry.

EVA will not only allow the use of renewable power, where available, but will allow for precise control and adjustment, potentially controlled by AI. It will be possible to use the servo motors that actuate the flaps to assess operating parameters like temperatures and pressures. It will also be possible to assess wear, which will help users with preventative maintenance. This is simply not possible with pneumatics.

By eliminating compressed air from valves, Plattco can help reduce compressed air loads for our customers, reducing the cost per tonne of cement. Another key area is AF, which feeds directly into carbon-neutrality goals. This is an area where the control of valves is crucial to process control, by helping to ensure that the pyroprocess is as stable as possible.

***GC:* What's next for Plattco?**

KG: The double flap airlock valve was developed by Plattco nearly 75 years ago. It has undergone numerous developments over that time to present it as the main alternative to the rotary valve, which is still the 'standard' valve outside of North America. We would like to change that and we're excited to have the opportunity to bring EVA into the next 75 years of the double flap airlock valve.

***GC:* Kevin, thanks for your time today.**

KG: You are very welcome!

Plattco double-flap airlock valves on electrostatic precipitators at a cement plant in the US.

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India: Humboldt Wedag commissions pyroprocessing line at JSW's Nagaur plant

Humboldt Wedag India has commissioned a pyroprocessing line and material handling system at the JSW Cement Nagaur plant. The project was awarded to Humboldt Wedag India in 2024.

The plant operates an 8000t/day pyroprocessing line using a KHD preheater and rotary kiln, which the company says is designed to deliver high thermal efficiency, operational reliability and consistent clinker quality. Humboldt Wedag India also supplied a material handling system to transport raw materials and clinker across the plant.

Source: KHD Humboldt Wedag.

Source: Anton Zhou via Linkedin.

Sweden: SaltX and Holcim partner on electrified clinker production

SaltX Technology has signed a joint development agreement with Holcim to develop a fully electrified clinker production process, with the goal of building Europe's first fully electric cement plant by 2028. The collaboration builds on an earlier partnership established in June 2025, and focuses on electrifying cement production through SaltX's technology platform, combining electrified calcination and electrified sintering to enable fossil-free clinker production. The companies have established a joint technical and commercial roadmap, beginning with pilot-scale testing before moving to industrial-scale deployment.

Two technical development tracks are being pursued: The first focuses on electrified calcination using plasma burners in SaltX's electric arc calciner to heat raw meal and produce calcined material. Large-scale testing is planned at the electric calcination research centre in Hofors during 2026. The second track focuses on combining electrified calcination with electric sintering to produce clinker without fossil fuels.

Vietnam: Sinoma (Nanjing) signs EPC contract for clinker line

Sinoma (Nanjing) and MeyGroup have signed an engineering, procurement and construction (EPC) contract for an 8000t/day clinker production line in Vietnam, according to a post on Linkedin by Sinoma's marketing director, Anton Zhou. The signing ceremony was attended by representatives of both companies and took place in Hanoi, Vietnam on 20 March 2026.

Canada: Progressive Planet develops Planet LCD cement

Progressive Planet has developed a supplementary cementitious material named Planet LCD Cement, based on limestone calcined diatomite. The company said the material can replace up to 50% of Portland cement while maintaining compressive strength in mortar cube tests meeting ASTM C618 requirements. Current testing has reportedly demonstrated strong compressive strength replacing Portland cement on a 'weight for weight' basis at 20%, 35% and 50% replacement, with all compressive strengths passing ASTM C618.

CEO Steve Harpur said "Planet LCD Cement uses diatomaceous earth, limestone and gypsum, all of which are plentiful materials. We have created a highly-reactive cement without metakaolin. Waste diatomaceous earth powders sell for a fraction of the cost of metakaolin. This opens up opportunities to utilise waste diatomaceous earth powders globally to replace 50% of Portland clinker with Planet LCD Cement."

A trademark application for the name Planet LCD Cement has been filed in Canada and a provisional patent application for the composition of Planet LCD Cement has been filed in the US.

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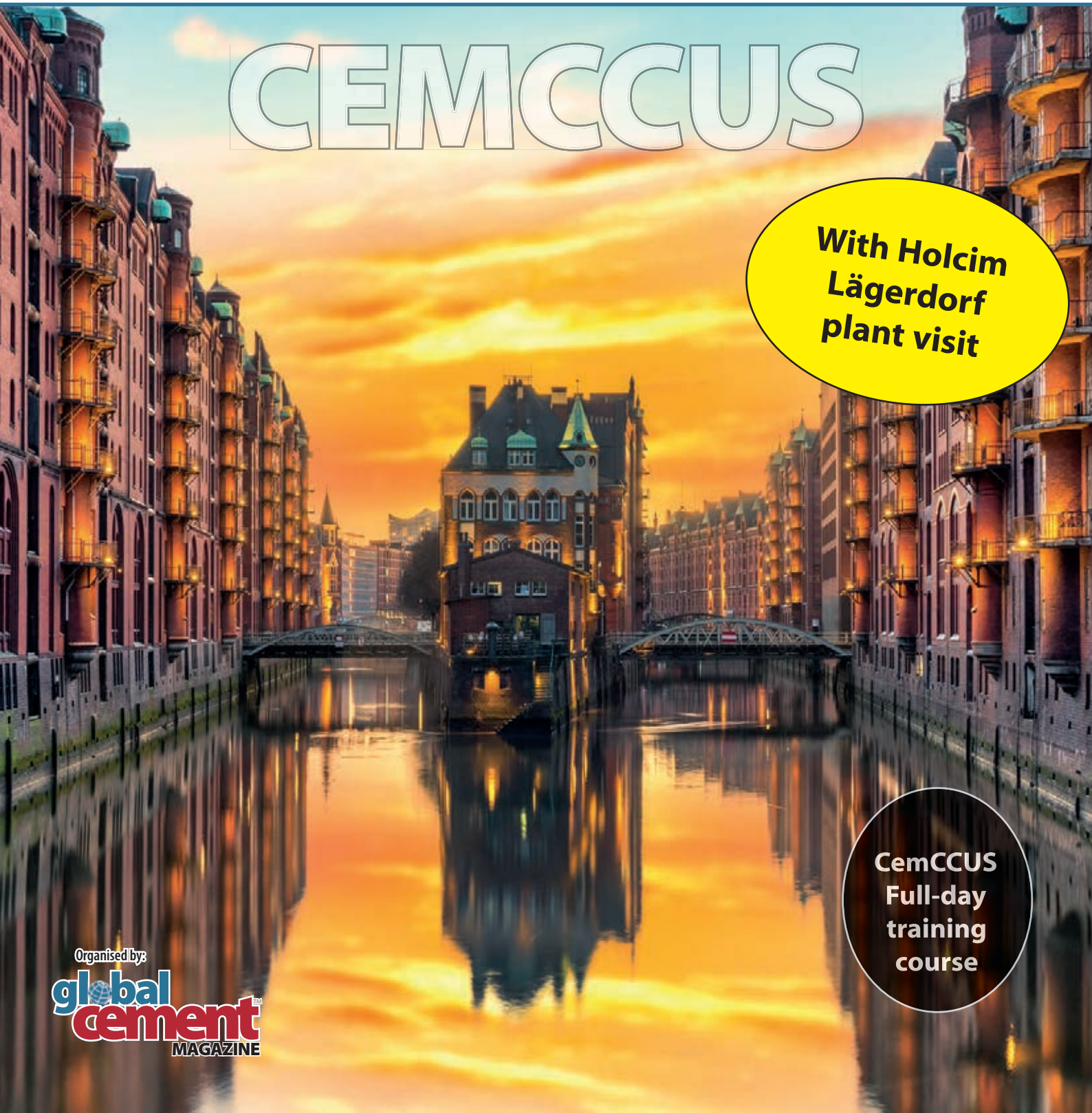

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Holcim Australia's Epping concrete plant.

Australia: Holcim completes zero-waste pilot at Epping and Preston ready-mix concrete plants

Holcim Australia has completed a new pilot project at its Epping and Preston ready-mix concrete batching plants in Melbourne, Victoria. During the pilot, the plants delivered zero waste to landfill, generated zero Scope 2 CO_2 emissions and recorded zero water discharge incidents. The producer previously delivered similar zero-impact initiatives at plants in New South Wales and Queensland.

Separately, Holcim Australia upgraded its Albany ready-mix concrete plant in Western Australia with new environmental management systems. The company said that the upgrade will support its service in the Great Southern region.

UK: Holcim supplies biochar-based concrete to Canary Wharf Group

Holcim UK is supplying net-zero CO_2 concrete that incorporates biochar and spent coffee grounds to property developer Canary Wharf Group (CWG) for use in its developments, in collaboration with a collective of academic and civil engineering entities. The producer says that it is also experimenting with other ingredients, including graphene. It previously supplied trial pours at CWG's Bank Street and Wood Wharf construction sites in 2025. One trial involved a mix with embodied emissions of -14 $kgCO_2e/m^3$.

åHolcim UK ready-mix concrete product development director Jasen Gauld said "By optimising the biochar-coffee mix, we have achieved net zero concrete – a Holcim first – while maintaining strength, durability and circularity. Where increased binder might otherwise have been needed, our products can remove that requirement, reducing overall embodied carbon. At the same time, the carbon in the biochar is locked into the concrete, allowing buildings to fulfil a new role as long-term carbon stores, keeping CO_2 safely out of the atmosphere."

Ireland: Breedon Group completes Booth Precast Products acquisition

UK-based Breedon Group has completed its acquisition of County Laois-based precast concrete company Booth Precast Products. Following completion of the acquisition, Breedon welcomes 32 colleagues from Booth.

Spain: Precast concrete construction projects rise so far in 2026

The National Association of the Precast Concrete Industry (ANDECE) recorded a 12% year-on-year rise in the total number of construction projects which used precast concrete in January and February 2026. Local press reported that ANDECE members comprise 70% of precast concrete sales across Spain.

India: Gaurs Group announces upcoming Noida precast concrete plant

Property developer Gaurs Group plans to invest US$27.3m to build a precast concrete elements and modular systems plant in Noida, Uttar Pradesh. Local press reported that the producer signed a memorandum of understanding for the project with precast concrete plant supplier Elematic India. A Phase 1, US$10.9m plant will commence operations in mid-late 2026.

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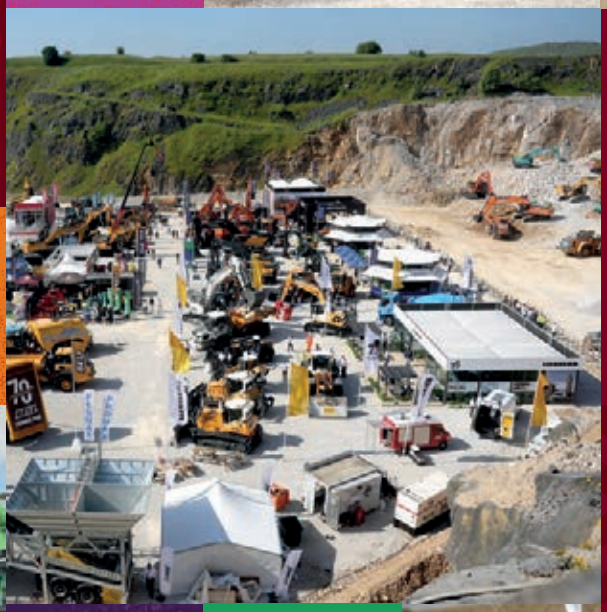

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Interview by Peter Edwards, Global Cement Magazine

IN DISCUSSION: TAMTRON

Tamtron Precision's Niko Toimela outlines the company's activities in the dry mix and concrete sector and its plans for growth.

***Global Concrete (GC):* Please can you introduce Tamtron Precision to our readers?**

Niko Toimela (NT): Tamtron Precision is a Finnish company with extensive experience in industrial process weighing systems, including for dry mix mortar and autoclaved aerated concrete (AAC) plants. The company was formerly known as Lahti Precision (founded in 1914), until it was acquired by Tamtron Group (founded in 1972) in 2023. Tamtron Precision is home to approximately a third of the group's 320 staff and the same proportion of its parent group's €55-60m turnover.

Tamtron Group's traditional main expertise concerns on-board weighing systems for moving vehicles and truck and railway scales. Now, with Tamtron Precision, the group has expanded competencies for process weighing and dosing applications.

A dry mix plant that contains key dosing, weighing and mixing equipment from Tamtron Precision.

These are used in the chemical, food, metal, battery material, forest and construction material industries. The company has offices in the Czech Republic, Denmark, Germany, Norway, Poland, Slovakia and Sweden.

We have completed hundreds of project deliveries for multinational corporations, original equipment manufacturer (OEM) partners and local operators. At one point, exports accounted for as much as 80% of our operations, and we retain the ability to design and deliver international projects on a large scale.

***GC:* How important is the concrete sector to Tamtron Precision?**

NT: The dry mix sector, including cement-based mortars, is an important part of Tamtron Precision's business, with numerous retrofit and turnkey projects over the years. Our main client base is divided across four areas: Europe, Asia and Australasia, the Middle East and North America. These references typically have maximum capacities in the order of 500–1000t/day.

In addition, we have over 20 years' experience of delivering mixing towers for AAC plants through our OEM partners. We have delivered close to 30 mixing tower projects, often in developing countries. Our delivery scope includes handling of raw materials like cement, lime, gypsum, aluminium (powder or paste), additives and water. Dosing, weighing, dedusting and mixing of materials are taken care of in our mixing tower. We also always deliver automation systems for mixing towers, which includes process control, recipe management and production reporting software.

***GC:* What does Tamtron need to consider when it designs dry mix plants?**

NT: Tamtron always looks at the best layout for equipment and to minimise the size of the building for a given capacity. This reduces capital expenditure significantly. Designing the material flow to the scales and onward to the mixer is always important and, while AAC plants may use only four ingredients, some more complicated dry-mix blends can contain as many as 50!

At Tamtron, we try to use gravity as much as possible, rather than – for example – feeders. For free-flowing materials like cement, we can use relatively shallow angles for the pipes. However, stickier materials like gypsum require a steeper angle. Often, we work with external ducting partners, preferring to focus our time on our own core expertise products for dosing, weighing, mixing and automation.

Instead of using screw feeders, we have developed dosing solutions based on fluidisation, including fluidisation components for silos and fluidisation hoses for transport. With just a small amount of pressurised air, it is possible to make fine dry powders flow like liquids on hoses inclined at as little as 3–5°. As soon as the airflow stops, the material stops: no moving parts, very little energy consumed and no de-dusting. Very thorough mixing can be carried out using double-shaft mixers with high-speed choppers, a technology that Tamtron Precision has mastered.

GC: **How are the main pieces of equipment controlled?**

NT: Our dry-mix plants operate using a batch-wise methodology. The equipment is automatically controlled by our proprietary software according to the required recipe. For clients that allow it, Tamtron is able to view the process in real time so that it can advise on the process and remedy any potential issues, should they occur. Of course, it is not always possible to have 'eyes' on all plants. Some larger clients prefer to keep troubleshooting in-house, while some remote sites have limited internet connectivity.

GC: **What are the typical requests that Tamtron Precision receives from clients?**

NT: There is a trend towards turnkey projects, which Tamtron Precision is slightly too small to handle. We can work both with end customers directly or with general contractors. We have a good relationship with other partners involved in projects, which is just as well, as the complexity of some projects is on the rise.

Niko Toimela is Vice President - Sales and Marketing at Tamtron Precision Oy, based in Lahti, Finland, where he has worked since 2013. Before joining Tamtron, Toimela spent 13 years in the paper industry.

Sometimes we see height limitations in construction permissions for dry mix plant building and/or silos, which causes new requirements for designing plants. To answer this challenge, we work flexibly together with the customer to modify the layout to find the optimum solution. We have one reference where a dry-mix plant was constructed in a building just 4m high.

GC: **How are your systems manufactured and installed?**

NT: The main dosing, weighing and mixing equipment is manufactured at Tamtron Precision's facility in Lahti, with components and steel structures from other suppliers. Electrical and automation systems

Below: A mixer from Tamtron Precision.

are also the responsibility of Tamtron Precision. The equipment is assembled and tested at our facility. Also, factory acceptance tests are carried out, together with customers, and the accuracy of scales is tested and reported.

Installation is most often taken care of by the main contractor, with supervision from Tamtron Precision. Overall, it typically takes 6–10 months from signing the order to readiness for full production. If an automation system is delivered, commissioning and training of operators is always included in the package.

After commissioning, automation experts would typically stay on site for another 1–2 weeks to ensure that the plant is operating smoothly. We remain on hand to help with questions that may arise later. These kinds of enquiries often involve minor changes to the feed materials or the blends produced.

It is not always necessary for Tamtron to be on site the whole time. Indeed, we commissioned a dry mix plant entirely online at the height of the Covid-19 pandemic.

***GC:* How has business been affected by recent conflicts, tariffs and inflation?**

NT: These events caused minor supply chain disruption for a couple of years, but things are now back to normal. We are not exposed to tariffs to a great extent, as only a small proportion of our business is in the US.

Below: Niko Toimela inspects a stainless steel mixing tank.

Source: Tamtron Precision.

***GC:* How important are retrofit projects?**

NT: Retrofit projects are an option, but we often design our dry mix plants with the possibility to add a second mixing line later. It could also be that plants have been designed so that the raw materials and blends produced can be changed at a later date. Flexibility is key to our clients, who, in turn, serve their own demanding customers.

***GC:* How do you see the dry mix sector changing in the near future?**

NT: There is a greater emphasis on the use of gypsum as a preferred binding agent over cement, which still comes with a far higher CO_2 footprint. Those clients that use gypsum are increasingly using blends with some recycled content, which presents some awkward characteristics.

***GC:* How does digitisation/AI affect Tamtron?**

NT: There are three business units in the company, but I've only mentioned two so far. The third is Digital Services. One of its products, mScales, is a cloud-based service that can handle all of the client's weighing information in the Cloud, in a software-as-a-service (SaaS) approach. This covers all incoming raw materials and plant-internal materials stores. Also, if the end product is unloaded and weighed into trucks, this material can be followed in mScales.

Tamtron was one of the first companies in the world to offer fully mobile-based despatches, with the weighing documentation and certificates all held on a mobile app. Pictures of, for example, truck weighing taking place, could be stored on mScales. It simplifies everything and puts all of the key information in the same place. When loading is complete, the information is fed automatically back to customers' enterprise resource planning system, so that stakeholders can access the information they need.

Regarding AI, we are testing a system to visually analyse the material that is being fed to the truck. This can compare the material that it sees with what it expects to see being loaded and alert the operator to any discrepancies.

***GC:* What are Tamtron's aims for the building materials sector in the coming years?**

NT: We are establishing the brand within Europe, and making the connection for clients that Tamtron Precision is the new name for Lahti Precision. To do so, we are making a number of strategic changes across our European facilities to be closer to our clients, including recruiting additional representatives. We are making a big push to expand in all areas of the construction materials segment in Europe... and, in time, beyond!

***GC:* Thank you for your time today, Niko.**

NT: You are very welcome!

Italy: Steady 2025 for Buzzi

Buzzi reported consolidated net sales of €4.52bn in 2025, up by 5% year-on-year compared to the previous year, with like-for-like growth of 0.5%. Recurring earnings before interest, taxation, depreciation and amortisation (EBITDA) totalled €1.24bn in 2025, down by 3%. Cement and clinker sales increased to 31.9Mt in 2025 from 26.3Mt in 2024, representing a 21% increase, although on a like-for-like basis cement volumes were broadly stable compared to the previous year.

The company said that the global economy 'demonstrated a solid capacity for resilience' in 2025, despite trade tensions and geopolitical pressures. Growth in Europe, however, remained subdued due to weak domestic demand and limited investment. The US economy continued to expand supported by domestic demand. Among the main emerging markets in which Buzzi operates, Brazil saw growth driven by domestic demand while Mexico recorded weak economic expansion, with 'stagnant' domestic demand and pressure on consumption. The UAE experienced strong growth supported by both the energy sector and non-oil sectors, particularly construction, tourism and financial services.

Greece: Titan Group reports 2025 financial results

Titan Group reported sales of €2.67bn in 2025, representing a 6% like-for-like increase, supported by strong performance in Greece, Egypt and Southeast Europe, as well as positive contributions from US operations. Titan said that the year was 'marked by heightened geopolitical uncertainty,' including tariff pressures on cement in the US and another year of a 'sluggish' residential market. EBITDA rose by 9% to €606m, driven by 'resilient' pricing measures, volume growth in key markets and increased export activity from Egypt. Net profit reached €236m, up by 7% year-on-year. Cement sales closed the year at 18.0Mt, marking a 1% increase year-on-year.

In the fourth quarter, sales increased by 8% to €657m, while EBITDA rose slightly to €133m. Volumes grew across all core products and regions, supported by strong demand in December 2025.

France/Syria: Senior former Lafarge executives jailed over IS payments

A court in Paris has found Lafarge, now part of Holcim, guilty of charges that its Syrian subsidiary financed terrorism and breached EU sanctions to keep a cement plant operating in northern Syria during the country's civil war.

The case was the first time a company has been tried for - and found guilty of - financing terrorism in France. ECCHR and Sherpa, the two organisations that filed the initial lawsuit, called it "A historic decision in the fight against multinational corporations' impunity."

A total of eight former Lafarge employees were found guilty. They include its former CEO Bruno Lafont, who has been sentenced to six years in jail. His lawyer said that he would appeal, as did the lawyer for Christian Herrault, Lafarge's former deputy managing director, who was sentenced to five years. Firas Tlass, a Syrian ex-member of staff who made the payments to the jihadist groups, was sentenced to seven years in jail in absentia. It was not immediately clear whether Tlass and the other former employees found guilty would also appeal.

Judges determined that Lafarge in total paid €5.59m to extremist groups, including ISIS and the al-Qaeda-affiliated Nusra Front, both designated as terrorist groups by the EU, between 2013 and September 2014. Isabelle Prevost-Desprez, the Presiding Judge, said that the payments made by Lafarge helped to strengthen extremist groups that carried out deadly attacks in Syria and beyond. "It is clear to the court that the sole purpose of the funding of a terrorist organisation was to keep the Syrian plant running for economic reasons. Payments to terrorist entities enabled Lafarge to continue its operations," Prevost-Desprez said. "These payments took the form of a genuine commercial partnership with the ISIS."

Lafarge has been ordered to pay a €1.125m fine, the maximum penalty available for a company, as prosecutors had requested. "Lafarge SA acknowledges the court's finding, which concerns a legacy matter involving conduct that occurred more than a decade ago and was in flagrant violation of Lafarge's Code of Conduct," the company said in a statement. "The decision is an important milestone in Lafarge SA's actions to address this legacy matter responsibly and the company is reviewing the court's reasoning." Holcim did not immediately respond to a request for comment.

The Jalabiya plant, located in northern Syria and bought by Lafarge in 2008 for US$680m, began operating in 2010, just a few months before the beginning of the Syrian uprising in early 2011. The court found more than €800,000 was paid to secure safe passage for employees over the Euphrates River, while €1.6m was used to buy raw materials from quarries that were under ISIS control.

In a separate case in the US in 2022, Lafarge admitted that its Syrian subsidiary paid US$6m to ISIS and the Nusra Front to allow employees, customers and suppliers to pass through checkpoints after civil conflict broke out in Syria. The group has already paid US$778m in forfeiture and fines as part of its US plea agreement. Lafarge is also under investigation in France for complicity in crimes against humanity.

Sweden: Heidelberg Materials to scale down clinker production at Skövde

Heidelberg Materials Sweden has announced that it intends to focus its activities at the Skövde site 'on the end product cement' from 2027 onwards. The reason for this is reportedly a decline in cement sales, driven by continued weak construction demand in Sweden in the current economic conditions. Heidelberg Materials said that, as part of the ongoing optimisation of its European production network, it is aligning its cement portfolio towards low-carbon products, which require less clinker. Therefore, the company intends to concentrate most of its clinker production in Sweden at its larger cement plant in Slite, Gotland. Cement production in Skövde would primarily be based on clinker sourced from Slite, which supplies customers in south-western Sweden.

Heidelberg Materials is the only cement producer in Sweden. It says that around one quarter of the country's total cement volume is produced at the company's plant in Skövde, with the remaining three quarters supplied from Slite.

Slovenia: Solar power project for Alpacem

Austria-based producer Alpacem Cement and Slovenian photovoltaic solutions provider Enertron are developing a 20MW solar power project with a battery energy storage system (BESS) in Anhovo, western Slovenia. The project will expand the existing solar facility by adding more than 25,000 panels and include a BESS with 16MW operating power and 32MWh capacity. The plant is expected to generate around 20,000MWh/yr of electricity. Alpacem said the project will increase the share of electricity from its own renewable sources from 4% to 18% and reduce CO_2 emissions by approximately 5000t/yr. Completion is scheduled for May 2028.

Georgia: Capacity expansion at Kaspi plant

Kartuli Cement, which produces cement and concrete under the 'Hunnewell Cement' brand, has submitted plans to expand its Kaspi cement plant. An environmental impact assessment has been submitted to expand the plant's clinker production line. The proposed new line will raise clinker output by 1200t/day, or 0.38Mt/yr, bringing total annual production capacity to 1.86Mt/yr. The project is intended to meet growing domestic demand and reduce dependence on imported clinker from neighbouring countries.

France: Vicat's carbon capture project receives EU Innovation Fund grant

Vicat's VAIA (Vicat Advanced Industrial Alliance) carbon capture project has been selected for funding under the EU Innovation Fund 2024 programme, receiving a grant of €150m. The project will be developed at the Montalieu-Vercieu cement plant in Isère and aims to capture and store 'nearly all' CO_2 emissions from the facility, equivalent to around 1.2Mt/yr of CO_2. The VAIA project also includes the development of a broader CO_2 value chain in the Rhône Valley capable of handling up to 4Mt/yr of CO_2, covering capture, transport, utilisation, liquefaction and storage.

Jacob Winskell, Global Cement Magazine

CEMENT ALLIANCE SUMMIT 2026

The Cement Alliance is a European expert pool for the cement industry. It convened its 2026 Summit at Burg Obbendorf castle near Cologne, Germany, on 25 – 28 March 2026, with a programme of talks and networking, along with a visit to the global headquarters of host KIMA Process Control in nearby Jülich. Alliance members travelled from as far afield as Brazil, the US and Vietnam and joined KIMA Process Control in celebrating the 30th anniversary of its founding in 1996.

A Cement Alliance selfie at Cologne Cathedral. **Source:** Dirk Schmidt.

In 2016, founding members of the Cement Alliance, driven by their energy, curiosity and shared ambition, realised the concept of a European expert pool to serve the global cement industry: the Cement Alliance was born. A decade on, where better to celebrate its 10-year anniversary – and successes in that time – than in one of the great cement equipment-producing regions: North Rhine-Westphalia, Germany? And 10 is not the only 'big birthday' in the Alliance this year: monitoring equipment supplier KIMA Process Control has been operating at its headquarters in Jülich, in the heart of North Rhine-Westphalia, since 1996, and is in the process of a 30th anniversary expansion of its facilities. We simply had to visit!

Following a welcome dinner on 25 March 2026, Cement Alliance founder Thomas Hacker opened proceedings on 26 March 2026. He reviewed the successes of the (now 15-member) Alliance to date, and considered its strategic priorities at the present 'moment of transition and economic opportunity.' Hacker also introduced KIMA Process Control's Peter and Matthias Kalkert. The hosts welcomed the Cement Alliance to Germany and introduced the work of KIMA Process Control as a supplier of kiln and mill measurement and optimisation technologies to the global cement industry.

Member Innovation Spotlight sessions followed, on emissions control, gas cooling and waste heat recovery equipment supplier Redecam (hosted by Feliciano Spina) and sensors supplier SICK's strategic partner Endress+Hauser (hosted by Andrew Reese). Both speakers mentioned their US businesses, with Redecam having adapted to President Trump's protectionist measures by forming

Delegates pose for a group photo in the Burg Obbendorf courtyard. **Source:** Joana Bretz.

Top, left: Cement Alliance founder Thomas Hacker opens proceedings; **Top, centre:** Dinner in Cologne; **Top, right:** Javier Torres, Erwan Godard and Luis Dominguez take to the podium; **Middle, left:** Peter and Matthias Kalkert receive KIMA Process Control's hosting trophy; **Middle:** Peter Kalkert (left) and Feliciano Spina (right) present; **Above:** Delegates check in to Burg Obbendorf.

Sources: M and T Hacker.

a joint venture there, and Endress+Hauser having become a market leader by producing its own equipment in the US anyway – something it says its 'All American' competitors did not do.

Enotec representative Yeray García connected via video link to share his expertise on leveraging LinkedIn for business-to-business growth. There followed a series of sessions on KIMA Process Control, with Jan Philip Mertiz introducing the company's SmartFill fill level and temperature measurement system for ball mills, Norbert Spennrath introducing its MillPilot grinding unit optimisation system, Martin Kalkert introduced its GasTemp Flow gas measuring device and Shervin Sabzevari introduced AI-based kiln optimisation programme KilnPilot.

Luke Mason and Stan Dueck from Canada-based engineering firm Norda Stelo were the first guest speakers, presenting the role of the engineering sector in North America. Manirul Haque, founder and principal of US-based Macprotec Engineering, next outlined a future where cement industry automation is powerfully AI-enabled – driving smarter, safer, maximally cost-benefitted plants – while remaining resilient and not dependent on AI alone.

With the close of the day's presentations, the hosts transported the delegation to the centre of Cologne, where a riverside tavern laid on the very best in Rhenish delicacies in magnificent surrounds.

A second day's conferencing brought insights from the Alfran Technical Institute knowledge management programme, presented by Alfran's Luis Dominguez, and a guide to daily productivity with AI from Stratfield Group's Patrick Schomaker. De-Velop Consulting's Dirk Schmidt followed with an appraisal of Asian cement market opportunities and outlook, deploying data and Schmidt's own experiences to demonstrate the value of an Asian reorientation. KIMA Process Control's Matthias Hacker next set out his proposal for a new training-based collaboration framework, and *Global Cement* ended proceedings with our own global industry outlook under a 'new world order.' Our conclusions: automation-driven transformation, a shift in investments towards emergent, mainly Asian, markets and increased disruption to regulatory and multilateralism-based norms, echoed points raised in other presentations and in the far-ranging discussions surrounding proceedings.

Finally, all round to KIMA Process Control for lunch and a headquarters tour. Attendees toured the workshops where KIMA Process Control developed the products about which we had heard, and today produces them to ship to customers all around the world. The tour concluded in a new building, including a large warehouse space, into which KIMA Process Control recently expanded its operations.

The last stop was the Michael Schumacher Kart Center, with a competitive show of Alliance ambition, mixed in with the usual camaraderie, as members proved their reaction times – and steady stomachs – around a twisting track in 60km/hr go-karts. Hofmann Mess- und Auswuchttechnik's Erwan Godard claimed pole position. The team regrouped for a pit stop and a toast to a successful Cement Alliance Summit 2026, characterised by critical discussions in the same curious, energetic spirit that first forged the Alliance, 10 years ago.

Global Cement would like to thank the Cement Alliance and KIMA Process Control for their generous hospitality at this year's Summit.

Alfran will host the Cement Alliance Summit 2027 in its home town of Seville, Spain.

Dominican Republic: Cementos Cibao inaugurates new clinker production line

Cementos Cibao has inaugurated a new clinker production line at its plant in Santiago during a ceremony attended by President Luis Abinader and Vice President Raquel Peña. The new line has a production capacity of 3500t/day of clinker and incorporates automation technology, emissions control systems and 'optimal' particle filtration, according to local press. The company said that construction of the new line had been underway for a year. The line was built by Sinoma and the company said that it will support exports to the Caribbean and other markets.

"We are very proud to be a company committed to the development of the country and the care of our environment," said Rayza Rodríguez de Cruz, Second Vice President of Cementos Cibao. "This is why we made every effort to ensure that this facility incorporates the technology to reduce and control emissions in real time. In this way, we comply with the strictest environmental parameters and improve our operational standards."

Source: vicerdo via Instagram.

Canada: Amrize launches 'Product of Canada' cement label

Amrize has launched a 'Product of Canada' cement label to certify that its products are fully manufactured domestically, from raw materials through to final production. The label will be introduced across its key operations, starting with the Exshaw plant in Alberta and the Bath plant in Ontario, and then expanded to its other three plants in Canada. Amrize said that the label confirms compliance with national manufacturing requirements, while supporting local supply chains, jobs and communities.

The senior vice president for Canada at Amrize, Cory Cannon, said "With our 'Product of Canada' label, we are giving customers confidence that their building solutions are made in Canada with local-to-local service. We are committed to investing in and advancing Canada's building industry, supporting jobs, communities and the economy."

Peru: Holcim acquires majority stake in Cementos Pacasmayo

Holcim has completed the acquisition of a majority stake in Cementos Pacasmayo, in a deal valuing the Peru-based building materials producer at around US$1.5bn. Holcim said that it plans to launch a mandatory public tender offer to acquire additional shares in the company following the transaction. Holcim said that the acquisition expands its building materials and solutions portfolio in Peru and is expected to support profitable growth in Latin America. The company welcomed more than 2000 employees from Cementos Pacasmayo to the group.

Cementos Pacasmayo operates three cement plants with a combined production capacity of approximately 5Mt/yr, as well as 28 ready-mix and precast concrete plants. The company reported net sales of US$630m in 2025.

Miljan Gutovic, CEO of Holcim (left) and Humberto Nadal, CEO of Cementos Pacasmayo.
Source: Cementos Pacasmayo via Linkedin.

Colombia: Cemex to divest some Colombian operations

Cemex will divest certain operations in Colombia through several transactions 'with different parties', for a combined purchase price of approximately US$555m. The producer signed an agreement with Holcim to sell the Caracolito cement plant, the Santa Rosa grinding mill and selected ready-mix concrete, aggregates, mortar and admixture plants for a purchase price of US$485m. The transaction with Holcim is expected to close at the end of 2026, subject to regulatory approvals.

Cemex is also negotiating with other parties on the sale of remaining assets in 'the same general geographic area', that were not included in the Holcim transaction, for approximately US$70m. These include the Maceo and Cúcuta cement plants, with a combined installed capacity of 1.6Mt/yr, as well as the Clemencia grinding mill, ready-mix concrete plants and aggregates quarries. Holcim said that the acquisition will add more than 20 production sites, and complement its existing operations in Colombia, which include one cement plant in Nobsa, eight ready-mix concrete plants, one admixtures plant and one aggregates plant.

Brazil: CSN secures US$1.2bn loan

On 21 March 2026 CSN announced that it had signed a binding letter of commitment with a group of banks for a new secured syndicated credit facility of US$1.2bn, with the potential to increase to US$1.4bn. CSN said in a regulatory filing that the measure is part of a broader divestment plan announced in January 2026, and is expected to be secured in part by certain assets designated for divestment, which include the company's cement production facilities controlled by CSN Cimentos. It states that the funds are intended for the refinancing of existing debt and the payment of fees, expenses, and costs related to the loan.

Brazil-based Votorantim and China-based Huaxin Cement are among the companies in preliminary talks to acquire CSN Cimentos.

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MIKE IRELAND: A DECADE AT ACA

Mike Ireland looks back at his time at the helm of the American Cement Association (ACA), ahead of his retirement.

***GC:* What drove your move to the ACA in 2017?**

MI: I began my career with a major in engineering and industrial education. For the first dozen years or so, I worked for various state and government Departments of Transportation (DOTs) conducting training on construction and maintenance. During this time, I became very familiar with concrete and cement. I subsequently moved to a road building association, which was my introduction to association life. I don't think anyone in the world ever grows up saying they wanted to manage an association, but this is the point where I realised that I wanted to develop my career in this direction, going on to work for several engineering-related associations and societies.

I was working as President of the American Society of Mechanical Engineers (ASME) when I saw that the PCA, now ACA, was looking for a new President and CEO. I saw this as an opportunity to move into a very interesting role that took me back to my road-building roots. I was captivated when I was told that concrete is the second most consumed material after water. I had also recently visited Italy where I had seen Roman concrete structures still standing after thousands of years. I saw cement and concrete as a great product to represent, so I went for it – and didn't look back!

Workers preparing the ground for a concrete road base in Denver, Colorado. **Credit:** Ceri Breeze via Shutterstock.

***GC:* How did the ACA role differ from your previous ones?**

MI: The main difference for me was the change in perspective between a society and an association. Societies represent individuals, in my case mechanical engineers who paid relatively low membership fees. Most of ASME's income came from other activities like conferences, codes and standards, training, education, and so on. The focus was on providing a service for individuals.

In contrast, an association is responsible for its member companies and, by extension, an industry. The leadership needs to listen to the heads of industry and follow their lead. In ACA's case, it needs to meet the needs of the entire US cement industry. For me it was quite a shift to a model based almost entirely, around 90%, on membership fees.

Another big change is that, while I had some exposure to government affairs at ASME, it was not a major activity. With ACA, government affairs is a huge part of the job, indeed one I have developed over my tenure as President and CEO, particularly with the federal government.

Mike Ireland has been President and CEO of the American Cement Association (ACA) since January 2017. Prior to this, he spent 12 years at the American Society of Mechanical Engineers and previously also worked for the National Environmental Balancing Bureau and the American Traffic Safety Association. He will retire from ACA after the IEEE-IAS/ACA Cement Conference in Fort Lauderdale in April 2026.

***GC:* How has the US cement industry changed since you joined ACA?**

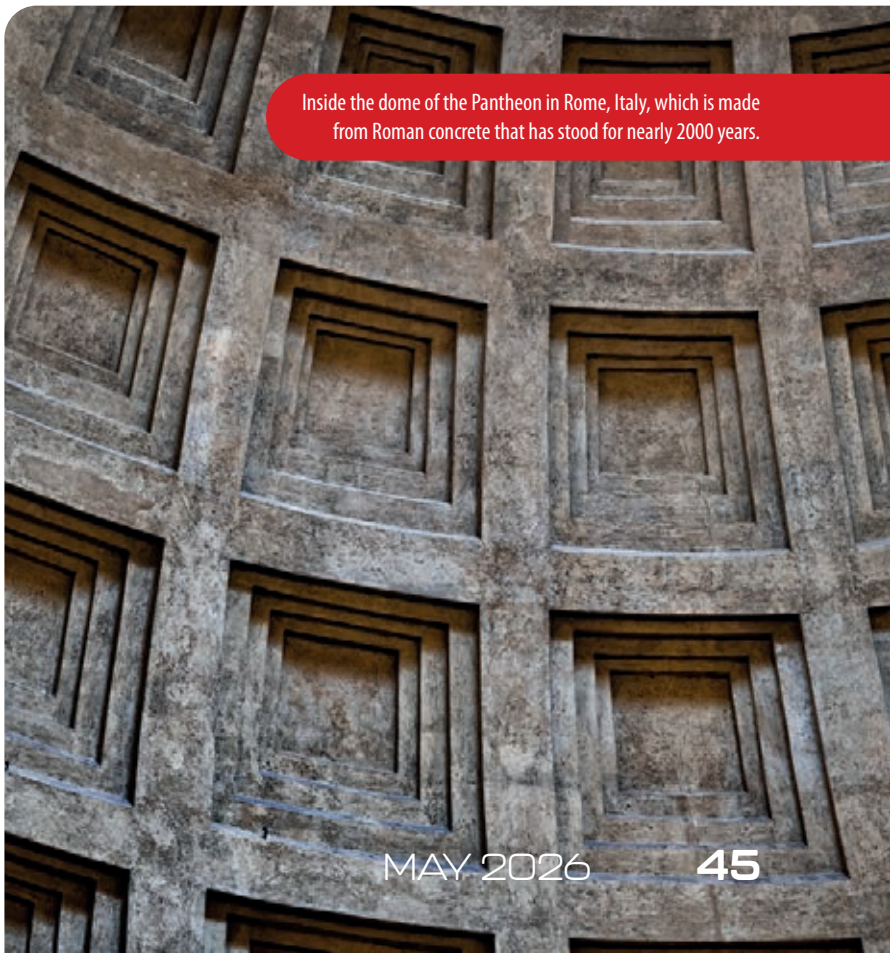
MI: The cement industry, like others, has changed with the changing administrations in Washington DC. As the political pendulum swings, ACA – and the US cement sector – is swung along with it! We've gone from Trump 1.0 to Biden and now to Trump 2.0, which is more energised than before. Along with this have come huge pivots, particularly in how we fund and roll out sustainability initiatives. There has been a change from 'sustainability because it's green' under Biden to 'economic drivers that also happen to be sustainable' under Trump. A key development of this work is the switch from ordinary Portland cement (OPC) to blended cements. The transition has been remarkable, with around 65% of cement sold being blended cement in 2025.

The industry has also become far more diverse over the past 10 years. There's a photograph of the ACA 'founding fathers' at ACA's offices in Washington DC in the late 1910s. They are all white men of a certain age who stayed in their jobs for decades. This is no longer the case… on all fronts. While we can be proud that diversity continues to increase, it is important to remember that there is also quite high turnover in the boardroom of a US cement producer, I would say in the order of 50% every 2-3 years.

This is because most producers are now owned by European, Asian or Mexican parent companies. We see a constant stream of new Country CEOs, who stay for a few years and then return home. ACA has to bring them up to speed on what's happening in the US. They are keen to learn, but it does feel a bit like a revolving door at times. I look around and see the change over the past 10 years. There are no member Chairs who are the same as when I joined ACA in 2017 and only two of ACA's own Board Members are still in post.

***GC:* How has ACA changed?**

MI: When I joined, ACA had more than 100 employees at a large premises in Skokie, Illinois. We have since downsized to about 35 employees and moved our headquarters to Washington DC to focus on government affairs. We have been able to retain the best people and recruit some new ones. That's no disrespect to the people we had to let go. They were all extremely focused on the job in hand and very capable. However, there were too many competing priorities and projects. We used to have about 50



Inside the dome of the Pantheon in Rome, Italy, which is made from Roman concrete that has stood for nearly 2000 years.

priorities, many lost in the fog. Now we have three, what we call our ABC: **A**lternative fuels, **B**lended cements and **C**O_2 capture, utilisation and storage (CCUS). It's a far more focused operation.

We have also reduced overheads by combining forces with the National Ready Mix Concrete Association (NRMCA). We now work together on codes and standards, communications and marketing. This allows us to focus on our product and our members, while saving resources and fostering greater collaboration with our biggest customer. These changes enable us to operate with an entirely balanced budget, which I am very proud of.

We have also increased - and continue to increase - the proportion of income from other sources, notably through developing the popular IEEE-IAS/ACA Cement Conference. We also published the Design and Control of Concrete, which is the industry 'Bible' for concrete in the US.

***GC:* What have been some personal highlights?**

MI: One of the best highlights for me was the name change, which took place in 2025. The old name, Portland Cement Association (PCA), caused confusion - the general public thought that PCA was from Portland, Oregon, or from Portland, Maine! Making the name clearer was a big deal for me. At the same time, we added the tagline 'Sustainable Cement for Resilient Concrete,' highlighting the more productive relationship we have developed with the concrete sector.

Another highlight was how we responded to a newspaper's attack on our sector in 2019, when it ran an entire week of features about the 'evils' of concrete. We developed our 'Shaped by Concrete' campaign to counteract this and the Global Cement and Concrete Association (GCCA) did something similar. We feel like we did a good job of correcting the record and have not faced similar misconceptions from the media since.

However, I think the thing I'm proudest of, and the thing that I would inscribe on my tombstone, is the publication of the *ACA Roadmap to Carbon Neutrality* by 2050. I have six kids and three grandkids, so I see the generations coming up behind me. I clearly saw the need to commit the industry to this transformation. It was not easy, with quite a bit of pushback. We *could* have proceeded without 100% backing from the sector, but we wanted 100% to demonstrate a united front. We felt that we wouldn't be able to press the issue that 'the industry' was behind the Roadmap if ACA did not represent 100% of the industry.

This was the time that ACA did some of its best work under my leadership. We were really humming along nicely with the Administration, all pulling in the same direction. It wasn't a bunch of competitors in the room. It was one industry working together to advance its needs.

***GC:* What will you miss about ACA?**

MI: The thing I'll miss the most are the people I worked with. This is not just ACA staff and the board members, but the people out at the plants. A few years ago we recorded a series of videos 'On the Road with the Roadmap.' We visited many plants and spoke with as many staff as possible, from CEOs and Plant Managers to people that had been hired just a couple of weeks earlier. It was very instructive to hear their perspectives, and inspiring to hear stories from workers whose families have worked at the plant for three or even four generations. The discussions we had on those trips were second-to-none when it came to understanding the needs and perspectives of the industry.

Overall, the workers in the US cement industry are extremely knowledgeable and passionate about their product. They understand their role in building the nation. They go home on a concrete road, go across a concrete bridge, see a concrete building, sleep in a house with concrete foundations. The country is built out of concrete - and will continue to be for many years to come.

Mike Ireland announced the name change from Portland Cement Association to American Cement Association in Birmingham, Alabama, in May 2025.













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***GC:* Is there anything you would do differently if you had your time again?**

MI: I would have joined ACA when I was younger and made fewer jokes so as not to irritate the staff as much! But seriously… building on my previous answer, I would be more 'hands on' with things like the plant visits. The Covid-19 pandemic showed us that we *could* work remotely, but I think we may have become too used to this for a while. I would bring the ACA staff together more frequently too.

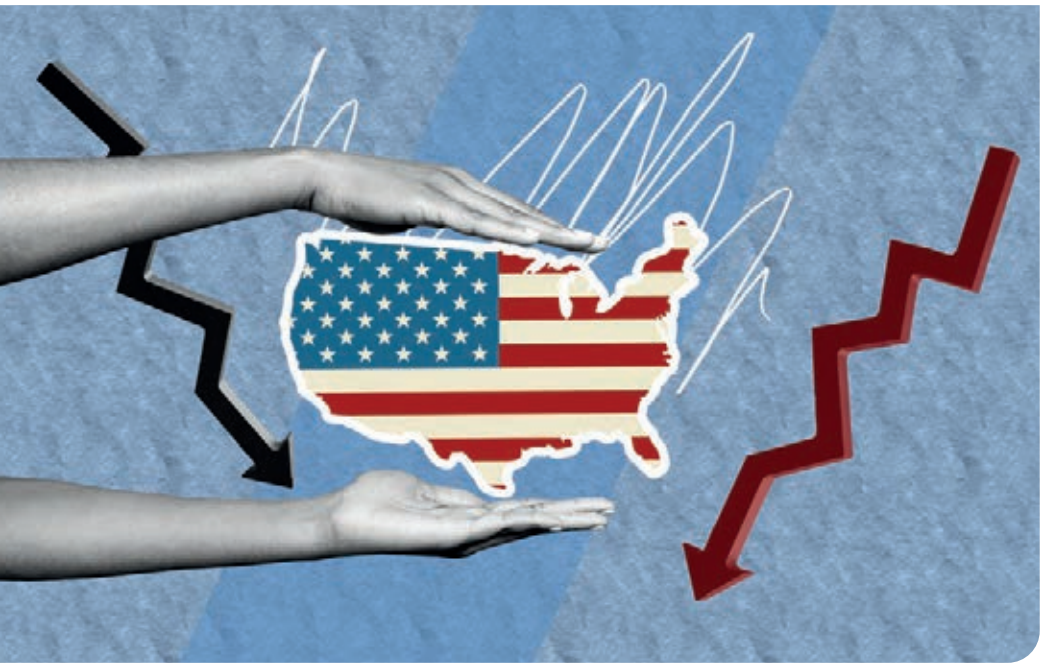
***GC:* What advice do you have for the next ACA President and CEO?**

MI: There are a few key points. Firstly, keep and appreciate the staff that you have as much as you can. Get to know them. I know some new CEOs like to bring in their own people, but doing so may jeopardise the good work being carried out. Secondly, keep developing ACA's relationship with the concrete sector. There is no point fighting with your customers!

Also, while they may change more frequently now than in the past, get to know the individual board members and company CEOs. What are their desires, goals and priorities? Knowing these is crucial to identifying their needs and likely positions in what can become fairly animated meetings. Understanding nuances is important.

The worst thing that can happen is to lose a member. It happened on my watch, but I am glad to say that the member has now returned, so we are back to nearly 100% coverage of the US cement sector.

The US is split between two opposing sides that seem increasingly far apart ideologically. The political pendulum will continue to have a big effect on ACA in the future.



***GC:* How would you like to see ACA develop in the future?**

MI: As the cement industry develops, there will be several parts of it that are going to be replaced by AI. Maybe not so much initially at the plant, but I think robotics will play a big part. Many of your readers will already have seen the video of the 'robot dog' conducting surveys at a cement plant in Germany. This kind of thing will become far more prevalent over the next 10 years and ACA needs to move with the times.

There has been no period of smooth sailing during my tenure at ACA. With the global disturbances we are seeing at the moment, the prospects for smooth sailing remain remote. Despite these distractions, the ACA needs to remain focused on its mission to decarbonise the US cement sector. It also needs, along with the international associations, to find ways to support decarbonisation globally.

And, let's not forget that the political pendulum might swing back in the other direction again. This could see a return to funding for decarbonisation projects, but there's also the risk that the industry will be asked to meet physically impossible emissions limits, as has been suggested by previous administrations. ACA needs to be prepared for all eventualities - and I would like to think I've left it well placed to take on whatever the future holds.

***GC:* Any final thoughts?**

MI: I'd like to thank the US industry for hiring me and letting me be part of its growth. I have worked in a lot of different places, but the past 10 years have been the most meaningful to me. This is due to the progress we've made on sustainability, the amazing people I have worked with, the salt of the earth discussions at the plants and, of course, the product itself. There really is no product that can do the same job as cement and concrete. It's been a wonderful opportunity and it is very satisfying for me to retire with ACA as my most recent memory.

***GC:* Thank you for your time today, Mike – and for our conversations over the past decade.**

MI: You are very welcome indeed. It's been great speaking with you!

HASLE
Ceramic Vortex Finder

The HASLE Ceramic Vortex Finder (CVF) is engineered to endure the harsh conditions of cyclones operating at elevated temperatures and utilizing alternative fuels, providing a durable alternative to traditional steel dip tubes.

The CVF is assembled on-site by individual ceramic elements, which interlock to form a stable tube hanging from a steel ring welded to the roof casing of the cyclone.

- Withstand temperatures up to 1200 °C / 2200 °F
- Enables sustainable fuel conversion through excellent resistance to chemical attacks
- High dimensional stability prevents deformation, ensuring high separation efficiency
- High abrasion resistance
- Smooth surface - Minimal build-up and coating
- 15–16 kg per element allows for easy handling during installation and use of existing manholes
- Variable diameter options: 1.5 to 7.5 metres

Germany - cement plant, lowest stage cyclone
Operating temperature: 950 °C. Lifetime achieved: 1 year. (Steel dip tube previously used achieved a 2-3 months lifetime).

Canada - cement plant, 2nd lowest stage cyclone
Operating temperature: 800 °C. Achieved 1 year of operation and still running.

USA - cement plant, lowest stage cyclone
Operating temperature: 900 °C Achieved 2 years of operation and still running.

Australia - cement plant, lowest stage cyclone
Operating temperature: 850-900 °C. Lifetime achieved: 2 years and 9 months (Previously running without dip tube).

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HASLE

www.hasle-refractories.com

Interview by Peter Edwards, Global Cement Magazine

IN DISCUSSION: BRIAN SCHMIDT, ACA

A look at how the cement market of the US is changing in 2026.

***Global Cement (GC):* How has the US cement sector fared over the past 12 months?**

Brian Schmidt (BS): The US cement industry's volume's declined for the third year in a row in 2025, with consumption falling by 1.6% year-on-year to less than 100Mt. The year started weakly in particular, although the third quarter was fairly strong.

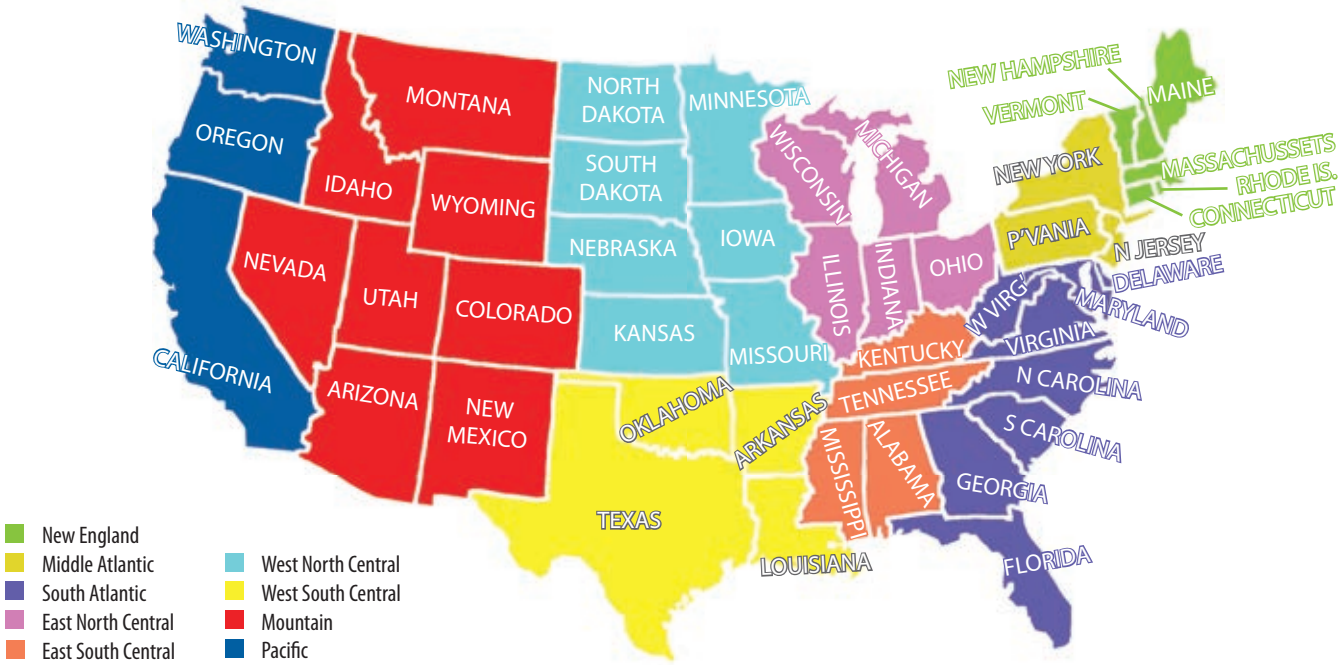
***GC:* Which regions were the strongest, and weakest, in 2025?**

BS: The West North Central region is the only census region that recorded meaningful growth in 2025. This encompasses states like the Dakotas, Iowa, and Minnesota. The West South Central, East North Central and Mountain regions were a mixed bag, seeing mostly flat volumes year-on-year. New England, Middle Atlantic and South Atlantic were decidedly negative, with consumption declines of around 3% each. However, the single weakest region was the Pacific, which encompasses California, Oregon, and Washington, as well as Alaska and Hawaii. Consumption in this region fell by 7% in 2025 relative to 2024.

***GC:* What factors are behind these changes?**

BS: The relative strengths and weaknesses in performance depend on the composition of the markets in different regions, how they are split between residential, commercial and public works. The

US Census Divisions, as used in the ACA's cement production forecasts.



Brian Schmidt is the American Cement Association's (ACA) Market Intelligence Leader. He joined ACA in 2012 and was previously a Regional Economist for its Pacific and Mountain regions. He has a degree in Political Science and Economics from Carthage College and an MBA from Lake Forest Graduate School of Management.

regions with the weakest performance have been more reliant on the residential and commercial sectors, both of which have been battered by continued high interest rates.

However, the West North Central region is very keen on concrete pavements for roads. Iowa is kind of the poster child for concrete pavements in fact, so this helps it to use more cement in public works than elsewhere. It's been able to benefit from the very large Infrastructure, Inflation and Jobs Act of 2021 (IIJA 2021), along with other regions of course.

The IIJA has been instrumental in providing something of a floor to cement demand over the past five years as the commercial and residential sectors declined in the face of high interest rates. The only downside was the timing. Unfortunately some of the funding made available was eaten up by inflation. Construction inflation was actually above the consumer prices index (CPI), so the work that could be done was reduced to some extent. Don't get me wrong, a lot of good work has been done, particularly in concrete pavement renewal, water supply infrastructure and sewers. However, there's still a lot of work to do.

Other sectors that saw increased demand in 2025 were data centres, which have taken on a life all of their own. They are bucking the trend in the otherwise troubled commercial sector, with record growth in 2025. Other exceptions included the healthcare sector, which grew markedly, while multi-family residential was the outlier in the residential sector.

***GC:* How are cement types changing in the US at the moment?**

BS: The main trend is the growth of low-CO_2 blended cements, which now make up 66% of cement consumed in the US. The growth has been

A data centre in New Albany, Ohio. While strong growth is expected from this sector in 2026 and 2027, it is expected to slow down.

rapid! In 2020 these types of cement made up just 3% of the market. In 2021 it was just 5%. Most of this, around 95%, is Type 1 L cement, which contains ground limestone.

If we take ~100Mt of cement sold in 2025, 66% of that is low-CO_2 blends and 95% of that is Type 1 L, this works out to 62.5Mt sold in 2025. It is the dominant type of cement - an amazing turnaround in such a short space of time.

***GC:* Are there any limits to how much of the market this kind of cement can take up?**

BS: The limits for Type 1 L cement are behavioural, rather than relating to production or performance. There are still contractors that do not want to use Type 1 L cement. ACA is working hard to change this perception.

***GC:* How are government policies affecting ACA members at the moment?**

BS: On the policy side, the most important thing for ACA members in 2026 is ensuring that the IIJA is replaced with a bill of sufficiently large scope when it expires in September 2026. Economically, we're also an interest rate-sensitive market. Since 2022, the Federal Reserve's mission has been to lower inflation, which has hit the residential and commercial sectors in the form of higher interest rates. ACA members would like to see a return to lower rates, so that the residential and commerical sectors can breathe a bit more freely again. However, rates are still restrictive and inflation is still sticky. The Federal Reserve has to remain cautious and not add any fuel to the inflationary fire.

A sprawling highway intersection in Miami, Florida. ACA is optimistic that public construction will continue to be strong over the next 2-3 years.

***GC:* How will the various economic sectors develop over the rest of 2026... and beyond?**

BS: Regarding infrastructure, the prospects depend to some degree on the next infrastructure package. We would love to be surprised, but indications are that it will be slightly smaller in scope than IIJA 2021. In the residential sector, we expect single-family housing to be flat year-on-year in 2026, despite the reductions in interest rates seen in the third quarter of 2025.

Our current projection is a further decline for the commercial sector in 2026. Offices and retail have high vacancy rates and it will take a prolonged period before new constructions are required from either of these sectors, the exception being Class A offices, which covers prestige developments. Industrial commercial construction is expected to remain strong, particularly when it comes to data centres and warehouses, but the pace of growth for both is expected to tail off.

***GC:* What are the overall prospects for the US cement industry over the next few years?**

BS: The US economy is still faced with the same obstacles of restrictive interest rates. This will ease, but it implies some near term weakness. ACA's current forecast is for mild negative growth in 2026, followed by modest recovery in 2027. Then, in 2028, we think all three construction types - residential, commercial and public - will all turn positive and record strong growth. This will be led by single-family residential construction, which has been very depressed for a number of years due to high mortgage rates. There's a lot of pent-up demand there. In the commercial sector, we think that a lot of the excess vacancy will become occupied over the next 18 months, leading to construction in 2028 as the logical next step. For public works, we anticipate that whatever replaces IIJA 2021 at the end of 2026 will take some time to bed in. It usually takes around 12 months before the effects of funding are reflected in demand, which suggests 2028 as the point when demand will start to come through.

***GC:* Thank you for your time today Brian.**

BS: Thanks - It was great to talk!

Ed Sullivan, The Sullivan Report

US RECOVERY DELAYED

The US cement market has been in decline for three consecutive years. What does the rest of 2026 hold?

The US cement market has been in a decline for three consecutive years. This translates into a decline of more than 10Mt/yr between 2022 and 2025. The volume loss has pushed clinker utilisation rates lower, reduced reliance on imports, and prompted a moderation in cement and concrete pricing. The principal reasons for this retreat have been sustained high interest rates and inflation eroding the strength of public spending programs. These dual adverse impacts have constrained private and public spending. The expectation that inflation and interest rates would ease later in 2026 provided hope that this year would mark the beginning of a long overdue, if modest, recovery.

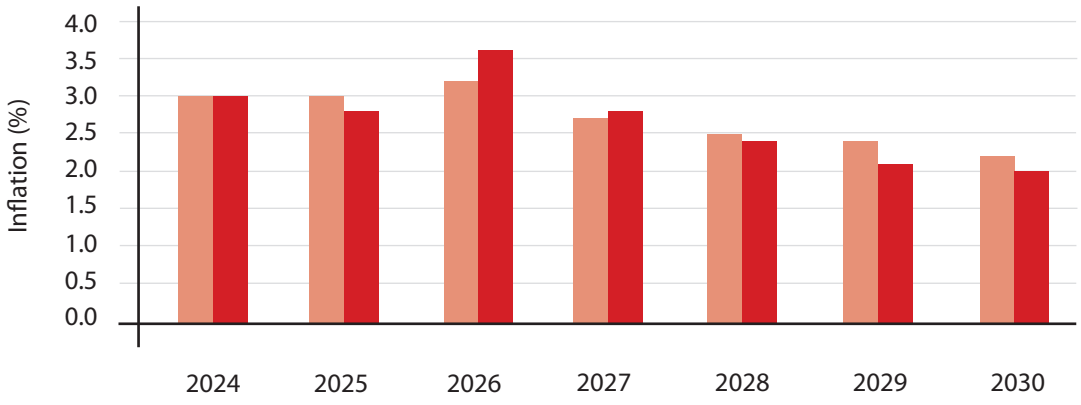
Things changed...

The Iran conflict introduced new uncertainty into the 2026 outlook. No one knows the scope of the conflict, but the conditions necessary to bring about a recovery in construction activity have certainly been delayed. The conflict with Iran heightens the probability that inflation, interest rates, and overall economic conditions will worsen. The longer shipping through the Strait of Hormuz is curtailed, the more adverse the consequences. Without an improvement in interest rates or inflation, the construction recovery that was expected to begin in the second half of 2026 now seems less likely. The potential of a fourth year of decline in cement consumption is now on the table for consideration.

Economic outlook

The US economy has shown surprising resiliency over the past few years even as high inflation and elevated interest rates threatened growth. The pillars of this resiliency have been consumer spending and strong job growth. Even prior to the Iran conflict, there was concern that these pillars were weakening. In recent years the middle- and upper-income levels have maintained relatively robust spending, even in the context of elevated inflation. In contrast, many households at the lower-end of the income spectrum have struggled to make ends meet – resulting in reduced spending, a depletion of savings, delinquencies, and increased reliance on credit card debt. Recent weakening in labour markets has added further to the stress facing the lowest income households. These conditions were expected to endure for some time and pose a threat to growth in consumer spending, which accounts for two out of three dollars generated by the economy.

Tax cuts associated with the Big Beautiful Bill, however, were expected to boost consumer spending during the first half of 2026. During the second half of 2026, inflation and interest rates were expected to ease. Under the direction of incoming



Inflation outlook. Consumer Prices Index (CPI), Average Annual Change.

Ed Sullivan has held senior positions at the American Cement Association, Chase Manhattan Bank Economics, Standard & Poor's and Wharton Economics. He has been cited for his forecast accuracy by the Chicago Federal Reserve and has lectured at several esteemed US universities.

Federal Reserve Chair Kevin Warsh, aggressive reduction in the Federal Funds rates were expected to materialise.

Taken together, real GDP was expected to grow at more than 2% over the course of 2026. Labour markets were expected to stabilise. Mortgage rates were expected to approach 5.5% by the end of the year. Combined, these conditions translated into optimism that a modest recovery in US cement consumption would materialise during 2026.

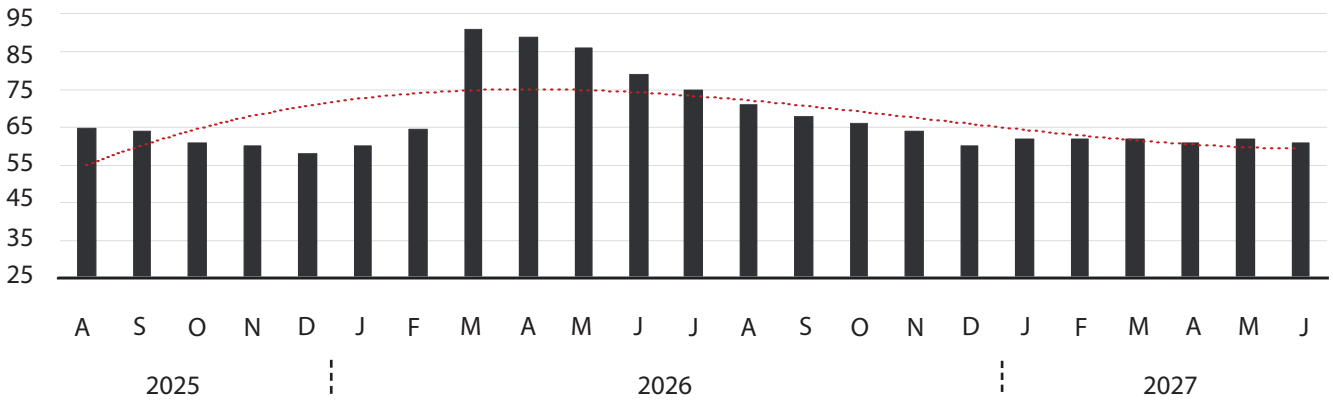
Unfortunately, heightened inflation accrued to the Iran conflict could amplify the distress that plagues the lowest incomes, and force it to migrate up the income chain and impact consumption among somewhat higher income households. Under such a scenario, both consumer spending and the labour market could be threatened and lead to an overall slowdown in economic growth.

The degree of the economic slowdown depends on the length of the disruption in shipping through the Strait of Hormuz. The longer the disruption in shipping, the higher oil prices will rise and the greater the economic distress. To bring a measure of the risk that the conflict represents, The Sullivan Report sketched three economic scenarios that vary depending on the length of the shipping blockage through the Strait of Hormuz.

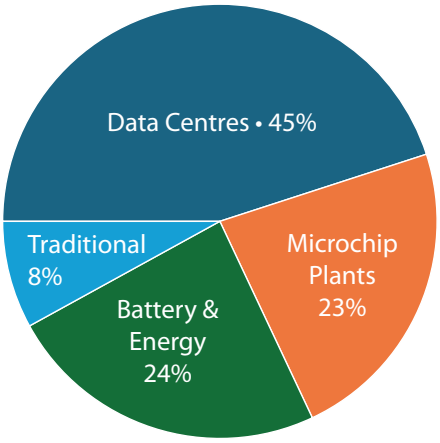
In the best-case scenario, the conflict ends quickly and the pre-conflict recovery scenario is only mildly pushed back. Under such a scenario, marginal growth in cement consumption could still materialise within 2026. In the worst-case scenario, the conflict expands regionally and lasts six months or longer. Oil prices would reach US$150/barrel. The average gasoline price at the pump across the US could rise from US$3.85/gallon (US$1.00/L) in March 2026 to more than US$5.00/gallon (US$1.32/L) by the end of the year.

Under the worst case scenario, inflation would rise from 2.9% in the first quarter of 2026 to as high as 4.1% by the third quarter of 2026. In turn, higher inflation would add to interest rates and steal strength from the economy. Unemployment would exceed 5%, from 4.3% at the start of 2026. Under the worst-case scenario, a mild recession materialises and construction spending records large declines – dragging cement consumption down along with it.

The baseline scenario strikes a middle stance. Under this scenario, oil markets gradually rebalance by the fourth quarter of 2026 as supply growth and moderating demand place downward pressure on prices. Real GDP growth would reduce by about



Monthly oil price outlook, August 2025 - June 2027. **Source:** Energy Information Administration (EIA).



Mega-project investments. It's not just data centres.

0.35% in 2026, while inflation would rise by roughly 0.30%. Until inflation subsides, the Federal Reserve will be hesitant to cut interest rates. Elevated inflation is expected to persist well through the first half of 2026. Once shipping becomes unrestricted, oil supply chains are expected to be restored, oil prices would retrace, and inflation will ease. But... all this would take time. No action by the Federal Reserve to cut rates is expected to materialise until late 2026 at the earliest, and perhaps not until early 2027. Allowing for lags between a rate cut and borrowing, we have to push back the timeline for the beginning of a construction recovery into 2027.

Construction

When the recovery comes, private construction activity is expected to lead it. Private construction, in turn, is expected to be led by the residential sector. While mortgage rates have declined by 1.0% in the past two years, they must decline further to stimulate a significant recovery in residential construction. A meaningful recovery in single-family home starts will not materialise until mortgage rates reduce to 5.5% - the estimated threshold rate that will unleash massive pent-up demand and position the residential sector to lead the construction recovery. Aside from the most optimistic scenario, the Iran conflict delays the timing of the arrival of the threshold rate and likely pushes back the onset of the residential recovery until 2027.

Non-residential construction continues to operate on a two-track basis: Interest-sensitive commercial categories, and less interest-sensitive sectors such as data centres, advanced manufacturing, and selected energy projects. AI-driven computational demand, cloud expansion, and enterprise digital transformation continue to support a robust construction pipeline. Cement consumption accrued to data centre construction, for example, has increased from less than 0.15Mt in 2020 to nearly 1.7Mt in 2025. These projects have shown dynamic growth and receive a lot of headlines but, even when onshoring activity is included, they represent less than 5% of total cement consumption. That means even a 10% growth rate in these types of construction would contribute less than 0.5% to overall growth.

In comparison, the traditional non-residential sector is only slowly beginning its recovery. At best, vacancy levels are expected to hover near current highs through much of 2026. Leasing rates in many sectors are soft. As a result, broad-based non-residential construction activity is expected to trail the residential recovery by a year or more, with timing varying by sub-sector. These sectors account for the lion's share of non-residential construction activity. The adverse conditions facing these sectors overwhelm the dynamism of data centres and onshoring activities. Without long term interest rates coming down, and a significant improvement in net operating conditions, a cyclical recovery in non-residential construction is not likely.

The vitality of public construction is compromised when high inflation rates are applied to fixed nominal levels of spending. In essence, inflation dilutes the spending power of the programme. According to our estimates, the US$100bn in highway spending based on 2021 dollars at the start of the Infrastructure, Inflation and Jobs Act (IIJA) buys roughly US$51bn in 2026's dollars - thereby diluting the potency of critical nominal dollar based Federal funding programmes. With higher inflation rates accrued to tariff and Iran impacts, the potency erosion of the programmes continues, suggesting another year of decline in real public spending. A key wildcard for the public construction outlook arrives in September 2026 when the current federal surface transportation authorisation expires.

Finally, conditions on the industry's supply-side could also deter some construction activity. Labour availability, immigration dynamics, trade policy and supply chain disruptions have all contributed to resetting the industry's cost base at a higher level. Together, these forces have resulted in significant construction cost increases. Higher construction costs raise the economic threshold required for projects to move forward. This ultimately reduces the volume of construction that can be undertaken. Until construction costs moderate, financing costs decline, or funding levels rise sufficiently to offset these pressures, the pace of construction activity across multiple sectors will be marginally hindered.

Summary

A recovery in construction activity and cement consumption is contingent on a meaningful decline in interest rates while maintaining relatively healthy labour markets. The conflict with Iran increases the likelihood that inflation and overall economic conditions will worsen. No improvement in interest rates or inflation is expected anytime soon. The conditions necessary to bring about a recovery in construction activity are expected to be delayed. The US construction recovery that was expected to begin in the second half of 2026, now seems less likely. The prospect of a fourth year of decline in cement consumption is now firmly on the table.

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DECARBONISATION

Organised by: global cement MAGAZINE

Interview by Jacob Winskell, Global Cement Magazine

STRONG SOUTHWESTERLY: UNACEM NORTH AMERICA

UNACEM Group is an industrial group with Peruvian capital and over 100 years of experience. Its diversified portfolio includes 12.5Mt/yr of cement capacity across seven plants and 4.5Mm^3/yr of ready-mix concrete capacity, and serves Peru, Chile, Colombia, Ecuador and the US. The group furthers its contribution to the development of these countries through its energy segment (installed capacity: 656MW) and related services.

UNACEM North America is a leading producer of cement, concrete, pozzolanic materials and aggregates in the US Southwest region.

***Global Cement (GC):* Please would you introduce UNACEM North America?**

Rafael Villalona (RV): UNACEM North America supplies innovative and sustainable solutions to the construction industry through four companies: a cement company with two plants, situated in Arizona (Drake Cement) and California (Tehachapi Cement); two concrete companies in Arizona and Nevada, and pozzolanic materials and aggregates quarries in Arizona and California.

UNACEM North America's Tehachapi cement plant in California, US.

Source: UNACEM North America.

The cement unit of UNACEM North America is an integrated business with an expansive market in the Southwest US, serving customers in the residential, commercial and infrastructure segments. Our Drake Cement plant is located on the site of a former rail town, 15km outside Paulden, Arizona. The plant came on-line in 2011 and was the first of its kind to be built in Arizona in more than 50 years. It features state-of-the-art equipment, with a rated capacity of 750,000t/yr of clinker. Meanwhile, our Tehachapi Cement plant is located 150km north of Los Angeles, in Kern County, California. Tehachapi Cement Plant was built by the City of Los Angeles in 1908 to supply materials for the Los Angeles Aqueduct. In 2023, UNACEM acquired the business from Martin Marietta Materials, officially renaming it Tehachapi Cement, LLC. It produces about 1Mt/yr of high-quality CEM-II/V Portland composite cement for clients across the Southwest.

***GC:* What is UNACEM North America's market outlook in 2026 and beyond?**

RF: All 2026 forecasts point to a year of stabilisation in the US. The economy remains very strong, investment activity is gaining momentum and construction activity is also recovering.

There is broad consensus that 2027 will be a year of recovery, provided geopolitical conflicts come to an end. We could say that the US has an economy that signals stability, followed by a positive trend.

***GC:* What growth strategies is UNACEM North America pursuing?**

RF: We have deployed a new customer-centric approach that focuses on partnerships, value-added propositions and micro-market segmentation. We anticipate recovering market share in Arizona and California. We are also investing in how we serve our markets, unlocking efficiencies and providing a superior customer experience. We expect to deliver performance above the market average.

Rafael Villalona is CEO of UNACEM North America, responsible for the direction of operations and strategy in its cement, concrete and aggregates businesses. Villalona has served on the board of the American Cement Association since November 2025. He has 20 years of experience in the cement field, including serving in executive roles at Mexico-based Cemex.

Villalona holds a Master of Engineering degree from the University of Maryland and a bachelor's degree from The Ohio State University, both in the US.

***GC:* What projects are transforming the operations of UNACEM and UNACEM North America?**

RF: Speaking as a holding company: I would like to underscore the beginning of construction of a new lime plant in Condorcocha, Chile, through CALCEM, a company established in partnership with Grupo Calidra of Mexico. The facility will have an initial production capacity of 200,000t/yr and represents an estimated investment of US$70m. The project, which is expected to begin operations in the second quarter of 2027, constitutes a strategic milestone in the diversification of our portfolio towards a high-value-added business, serving the mining and construction sectors.

I think the outcomes of this project may be instructive for UNACEM North America.

***GC:* How is your decarbonisation roadmap progressing?**

RF: During 2025, UNACEM continued to implement the initiatives included in our 2030 Roadmap (to 500kg CO_2-eq/t) across all our operations. In UNACEM North America, we advanced the optimisation of our product portfolio as part of our Scope 1 emissions reduction strategy through the incorporation of pozzolans into the cement production process. We are confident in the critical role of natural pozzolans as a preferred supplementary cementitious material (SCM). Proven over centuries, from Roman infrastructure to the foundations of modern America, pozzolanic cement and ready mix deliver durability and sustainability at scale. Our focus is to bring this solution back to the forefront.

In alternative fuels (AF), we continue to increase the usage of wood chips at the Drake plant and pistachio shells at the Tehachapi plant.

***GC:* What specific challenges confront UNACEM North America?**

RF: In 2025, volumes increased, margins tightened and costs rose. Tariff policies put pressure on the business, and labour conditions also became more challenging, which had some impact on our operations. Also, there was reduced labour force availability in the housing sector. Many investments are pending activation, contingent on interest rate cuts, which have yet to materialise.

Despite these headwinds, we were able to improve volumes, albeit with lower margins. Overall, 2025 was a year of progress and consolidation, and we have a very positive outlook for 2026.

***GC:* How is the market changing your strategic priorities?**

RF: We believe our strategic priorities will meaningfully reshape the market. We are committed to accelerating the industry's transition to a lower-carbon future, while reinforcing that cement and concrete are part of the solution – not the problem. We will support legislative decarbonisation objectives without compromising performance, reliability or cost competitiveness for our customers. At the same time, we will actively represent our customers' interests and serve as a strong, credible voice in industry advocacy.

***GC:* How does UNACEM North America envision its role in the future growth of US construction?**

RF: We are dedicated to outstanding customer and community service, approaching each relationship as a partnership focused on service, quality and social responsibility from a responsible supplier, employer, neighbour and corporate citizen.

***GC:* Thanks for talking to us today, Rafael.**

RF: You are very welcome!

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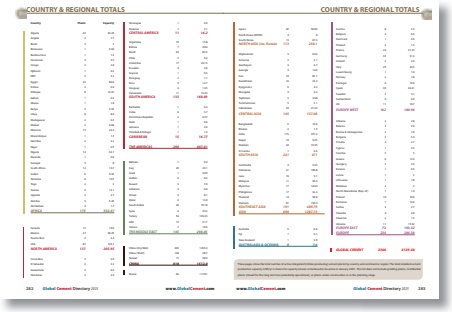

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IEEE: PROGRAMME

NOTE: Unless otherwise stated, events will be held in the **FLORIDIAN BALLROOM.**

Sunday 26 April 2026

17:00-19:00 - Reception in Exhibit Hall

Monday 27 April 2026

07:00-19:00 - Registration Open

08:00-12:00 - Process Training Module #1: Blended Cement Workshop
Location: 303A

09:00-13:00 - Exhibit Hall Open with Coffee
10:00-11.00 - Poster Pavilion (West Exhibit Hall A)

09:30-11:00 - **Welcome to cement: from basics to the big picture** *Lindsey Geiger, ACA; Matt Devitt, Fives FCB USA; Hunter J Garrison, Salt River Materials; Ryan Hendrickson, Mt. Savage Specialty Refractories; Zac Thurston, Ash Grove Cement*
Location: 204/205

11:30-13:00 - Lunch in Exhibit Hall

13:00-14:30 - CONFERENCE OPENING
Conference Chairs: *Monica Manolas, ACA; Jennifer Flemming, CIC; Kevin Grotheer, LOC*
Featuring: *Jason Latimer, Illusionist*

TECHNICAL PAPER SESSION 1
Moderator: *Greg Kemper, Bridge Gap Engineering*

14:30 - Paper 1: Fluid-dynamic optimization of Vertical Roller Mills *Caroline Woywadt & Michael Schiefer, Gebr. Pfeiffer*

14:48 - Paper 2: Visualizing vibration: Using amplified motion for troubleshooting cement industry equipment *Frank Vitucci, RDI Technologies*

15:06 - Paper 3: Predictive analysis of mechanical and electrical faults through line current measurement analytics *Nicolas Verbeek & Guillaume Francaux, Insens; Dylan Leonel Castro, Reliability AI*

15:24 - Paper 4: Electrical power system studies: Why they are needed and why they pay off *William J Kovacs Jr., Jose A Sanchez, Buzzi Unicem USA, Inc.; Franziska Freytag, ZAP Engineering and Construction Services*

16.00-17.00 - Sourcing and challenges of alternative fuels in cement plants *Matthew Nelson, Green America Recycling; Brian Giese, Heidelberg Materials; Raul Morales, Sapphire Americas*
Location: Grand Ballroom B

17:00-19:00 - Reception in Exhibit Hall
17:00-18:00 - Poster Authors (West Exhibit Hall A)

Tuesday 28 April 2026

07:00-19:00 - Registration Open

08:00-09:00 - Building tomorrow's workforce: Skills, pathways and AI in cement *Erica Flukinger, Heidelberg Materials North America; Robert Lovingood, ICR Staffing; Dave Campain; Fuller Technologies*
Moderator: *Matt Devitt, Fives*

09:00-10:00 - The reality of mental health in construction *Vince Hafeli, DBA*

10:00-10:20 - From conference to community: Investing back into the cement industry
Allen Hamblen, CalPortland;
Sivakumar Ramanathan, University of Miami

10:30-12:00 - From pilot to performance: Hard lessons from AI implementation in cement manufacturing
Moderator: *John Kline, Kline Consulting*

12:00-14:00 - Lunch in the Exhibit Hall

TECHNICAL PAPER SESSION 2
Moderator: *Daniel Locke, ZAP Engineering*

13:30 - Paper 5: Variable speed drives on mill motors *Elisabeth Freinhofer & Mario Ruckerbauer, Cemtec*

13:48 - Paper 6: Switching to low-carbon fuels through modeling *Tahir Abbas & Michalis Akritopoulos, Cinar Ltd; Syed Suhail Akhtar, Consultant*

14:06 - Paper 7: Conveyor fugitive dust control *R Todd Swinderman, Martin Engineering*

14:46 - Paper 8: H-2-D-Fossilize: A project concept for a total de-fossilization of clinker production process of a cement plant *Sabri Trabelsi, Limak Cement; Dirk Hoelscher, Air Liquide Deutschland GmbH; Semih Oflazoğlu, Air Liquide*

15:04 - Paper 9: Devil's advocate perspective on AI expert systems in the cement industry *Shervin Sabzevari, KIMA Process Control*

15:22 - Paper 10: Preventive maintenance diagnostics of fabric filters for better emissions compliance in cement manufacturing
Earl Parker & Bryon Girard, Auburn FilterSense LLC

13:30-16:00 - Process Training Module #2: Cement 101 – Chemistry and Quality Control
Location: 303A

16:00-17:00 - Is AI the new old guy in your plant?
Corinne Fields, Refratechnik Group, and Matt Devitt, Fives FCB USA
Location: Grand Ballroom B

17:00-19:00 - Reception in Exhibit Hall

Wednesday 29 April 2026

07:00-17:00 - Registration open

08:00-08:10 - Cemex Miami Plant Tour Preview
Jose Alberto Torres Balaguer, Plant Manager

08:10-08:30 - Five crucial lessons to survive and thrive in the global cement industry to 2036
Rob McCaffrey, Global Cement

08:30-09:30 - Two markets, one industry: Global leadership perspectives in cement *Rafael Villalona, UNACEM NA; Pedro Lerner, UNACEM Global*
Moderator: *Rob McCaffrey, Global Cement*

TECHNICAL PAPER SESSION 3
Moderator: *Dave Helfrich, Heidelberg Materials North America*

09:45 -Paper 11: The cost/value of high angle conveying *Joseph Dos Santos, Dos Santos International*

10:03 - Paper 12: Large motor failure analysis and corrective action
Steve Drzymala, Heidelberg Materials

10:21 - Paper 13: Electrical Energy Systems
Arron Heinerikson, ACA

11:00-12:15 - Economic forecast (national and regional insights) *Brian Schmidt, ACA*

12:00-14:00 - Lunch in the Exhibit Hall

13:30-16:30 - Process Training Module #3: Baghouse Training Workshop
Nate Litmer, BWF Envirotec; Zach Griffey, Coperion; Paulo Oliveira, Fives Group
Location: 303A

TECHNICAL PAPER SESSION 4
Moderator: *Brian Giese, Heidelberg Materials*

14:00 Paper 13 - Transforming cement production: The Open Process Automation (R)evolution
David Campain, Fuller Technologies;
Trevor Cusworth, CSI Automation

14:18 Paper 14 - Metal-enclosed gas-insulated switchgear: Pathways to SF_6-free solutions
Li Yu & Marc Elliott, Eaton Corporation

14:36 Paper 15 - Advancing additively manufactured blowback filtration for cement plant decarbonization and emission abatement
Srinivas Garimella, Pall Corporation

14:00-16:00 - Exhibitor Move Out

16:30-17:30 - Everything you wanted to know about cement... but were afraid to ask
Jeff Bump, C3S; John Kline, Kline Consulting; Peter Paone, ZAP Engineering & Construction Services
Location: Grand Ballroom B

18:30-21:30 - CONFERENCE CELEBRATION
Location: Omni Waterway Ballroom

Thursday 30 April 2026

08:00-13:30 - Cemex Cement Plant Tour

NOTE: Unless otherwise stated, events will be held in the **FLORIDIAN BALLROOM.**

Global Cement staff

IEEE: FLOOR PLAN & EXHIBITOR LIST

Floorplan on Pages 68 & 69.

Company Name	Stand Number
ABB Measurement & Analytics	602
Advanced Cyclone Systems	535
Aerzen Rental	721
Airgas, an Air Liquide company	712
Airstream Systems Inc.	930
aixprocess gmbh	523
alcemy	617
Alliance Technical Group	534
American Cement Association (ACA)	616
AMP-Cherokee	803
Andritz	609
ANYbotics	141
Ari8 srl	904
Artisan Industrial Construction	108
ASGCO	817
ASI Industrial	917
ATD Pressure Gas System	221
ATS	627
Auburn - A Nederman Company	104
Aumund Corporation	136
BASF Environmental Catalyst and Metal Solutions LLC	537
Bayliss Machine & Welding Co	418
Beckman Coulter	640
Beumer Group	402
BLT World/Scrapetec	903
Bricking Solutions	722
Bridge Gap Engineering	313
BSK Americas LLC (BSK Global)	921
C L Smith Industrial	807
Cambelt International	635
Carbon Re	521
CCC Group, Inc.	821
CECO	813
Cembulk Services	441
Cemengal P&G SA	218
Cement Optimized/Rock Products	717
CEMTEC Cement & Mining Technology GmbH	121
CemTeCon/Cement Alliance	741, 839-841
CEMTEK KVB-Enertec	906
Chengdu Leejun Industrial Co., Ltd.	920
Christian Pfeiffer	809
Cintasa Americas	720
Claudius Peters (Americas) Inc.	317
Cleanova Micronics	306
CM Shredders	911
CMN Steel Fabricators	936

Company Name	Stand Number
CNBM Equipment Group Co. Ltd	633
Construction On All Levels	919
Continental Construction Company, Inc	323
Coperion	200
Corrosion Monitoring Services	304
Cyclonaire	620
DALOG Diagnosesysteme GmbH	126
DCL	503, 507
Delta Ducon, LLC	606
df engineering GmbH	734
Di Matteo Förderanlagen GmbH & Co. KG	131
Dracyon Corporation	703
Dutch's Equipment Repair Inc DBA Mid-Atlantic Tractor	133
eFactor3	207
Elite Refractory Services	100
Endress+Hauser	940
Entech Products Corp	804
Everlasting Valve Co.	426
FCMD North America	719
FCT Combustion Inc	231
Fire Rover	541
Fives Group	410
Flender Corporation	718
FNA Inc.	701
Fons Technology International	124
Forge	912
Forjas Bolivar	433
Gambarotta Gschwendt Srl	122
GCI (Grace Consulting, Inc.) Emissions Testing Services	234
Gebr Pfeiffer	320
Geoclaste US	105
Global Cement	***416***
GroupCBS Electrical	639
Harsco Environmental	716
HASLE Refractories	316
Haver & Boecker	916
Hazemag	623
Herzog	330
HWI, A member of Calderys	800, 802
IAC	611
IMEG	805
Industrial Access Bulk Materials	516
Industrial Kiln & Dryer Group	340
Ingersoll Rand Industrial Ireland Belgian Branch	934
ITC Tax	236
JC Industrial Services	114

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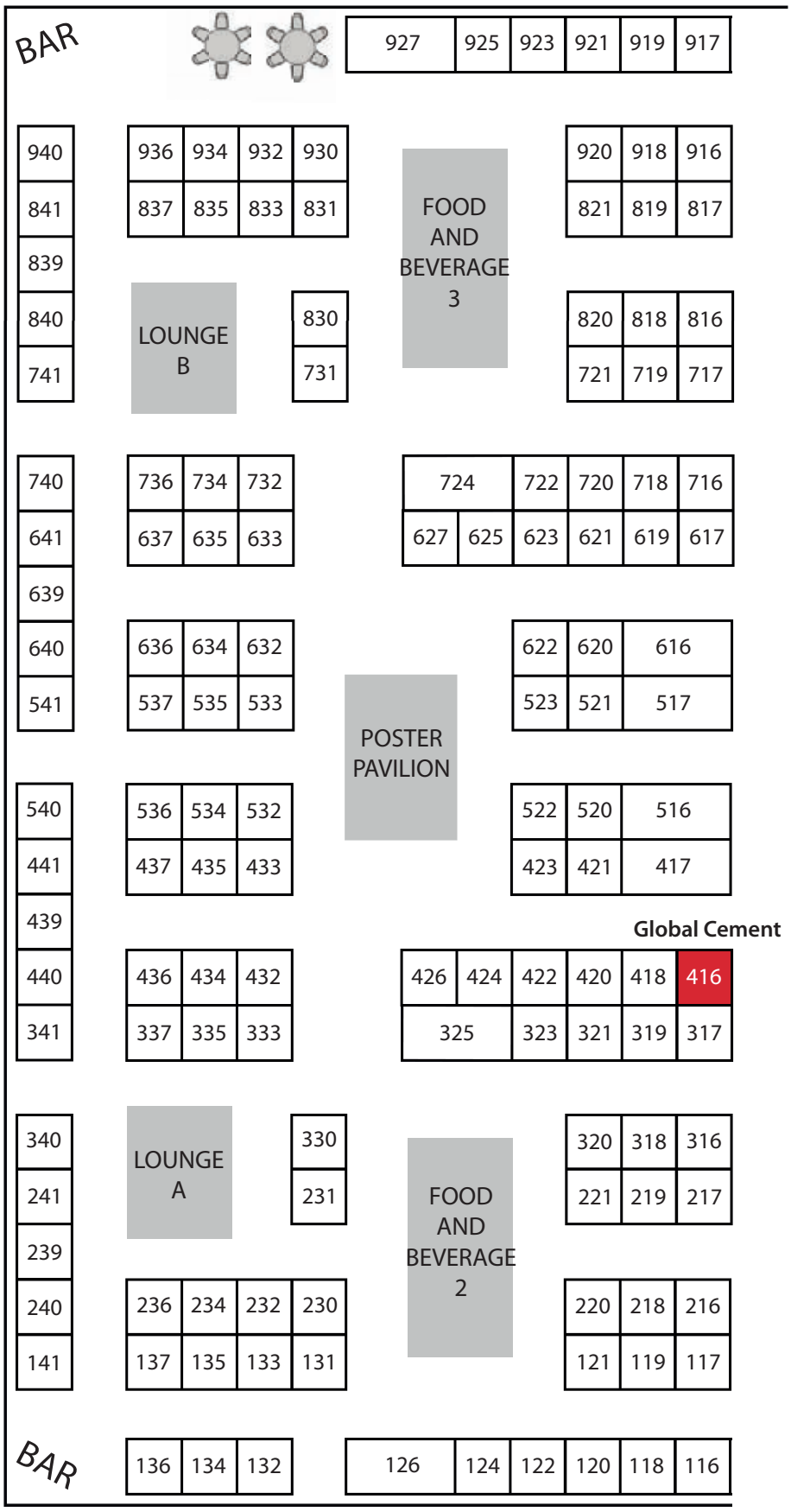
Company Name	Stand Number
Jedson Engineering	902
Jenike & Johanson	120
Juval	420, 422
K. R. Komarek	901
Kalenborn Abresist	107
Kamengo	118
Keith Manufacturing Co.	220
KHD Humboldt Wedag, Inc.	816
Kiln Technology Company	818
Klüber Lubrication	132
Knobelsdorff	101
Lawton Standard (Temperform)	318
Lechler, Inc.	622
Lhoist North America	811
Loesche	202, 204, 206
Lubrication Engineers	731
MAAG Gear US Limited	217
Machinery Maintenance Rebuilders	632
Magnum Steel Services Corp	915
Malvern Panalytical	201
Marietta Silos, LLC	502
Martin Engineering	212
Materials Handling Equipment	205
Maxi-Lift Inc.	910
Mayer Industrial	900
Mechanical & Ceramic Solutions Inc.	421
Merrick & Company	619
Merrick Industries Inc	819
Mole Master Services Corporation	325
Mostardi Platt	434
Motion Industries Inc.	435
Motridal	119
NAK Kiln Services	909
North Alabama Fabricating Co. / Wolf Point Engineers	918
Omaha Track	137
Parker Hannifin | BHA	707
Peak Power	134
PEBCO Inc	335, 337
Plattco Corporation	102
Pneumat Systems	208, 210
Postle Industries	837
Process Solutions Canada Ltd (PSCL)	341, 440
Promecon process measurement control GmbH	533
Purvis Industries	319
Qlar	216
Quvo Technologies	536
Rapat Corporation	117
RDI Technologies Inc.	302
Redecam	520, 522
Refratechnik North America, Inc.	517
Regal Rexnord	309, 311
Reitz India Ltd	806
Reliant CEM Services, Inc.	219
Respec	321
RHI Magnesita	417

Company Name	Stand Number
Richwood	708
Ripik Technology Pvt Ltd	110
RKB Europe SA	637
Rogers Equipment Sales, Inc.	135
RtTech Software	913
Salas O'Brien	820
SAXUM Engineering	801
Seal Plus - Seals For Rotary Kilns	423
Servimex, Mexico	641
Silo Pros Inc.	925
Sinoma CBMI Construction Co. Ltd	303
Sinoma Overseas Development Co. Ltd	736
Sintek North America LLC	625
SKF	603
SOLVAir	705
Southern Welding	103
SSI Shredding Systems Inc	116
Superior Construction Services	333
Tank Connection	835
Technogenia Lasercarb Oklahoma Inc	424
Technos, Inc.	905
Terra CO_2	112
TESTING Bluhm & Feuerherdt GmbH	239
The Cement Institute	831, 833
Thermo Fisher Scientific	111
Thermoteknix	830
thyssenkrupp Polysius	506
TMEIC Americas	230
Todd & Sargent	232
Toolkit	636
Tower Scaffolding & Insulation	109
Toyo Grinding Ball Co. Ltd.	203
Triodetic Ltd	437
U.S. Tsubaki Power Transmission	634
Unitherm Cemcon GmbH	740
Untha shredding technology America, Inc.	240
UptimeAI Inc.	923
Vega Industries, Ltd.	927
Ventmeca Fans	621
Vezér Industrial Professionals, Inc.	908
VIM Technologies, Inc.	241
VLS Environmental Solutions	436
Vortex	403
W. L. Gore & Associates	724
Wacker Chemical Corporation	932
Wear-Concepts, Inc.	732
WEG Electric	710
Welding Alloys USA	702
Wingfield Scale & Measure	532
World Domes	439
WTW Americas Inc.	540
XRSciences LLC	432
Zanini Renk	113
ZAP Engineering and Construction	300

Floorplan on Pages 68-69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FOOD AND BEVERAGE 3
920 918 916
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830 731
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721 719 717
740 641 639 640 541
736 734 732
637 635 633
724 722 720 718 716
627 625 623 621 619 617
636 634 632
537 535 533
622 620 616
523 521 517
POSTER PAVILION
540 441 439 440 341
536 534 532
437 435 433
522 520 516
423 421 417
Global Cement
436 434 432
337 335 333
426 424 422 420 418 416
325 323 321 319 317
340 241 239 240 141
LOUNGE A
330 231
FOOD AND BEVERAGE 2
320 318 316
221 219 217
236 234 232 230
137 135 133 131
220 218 216
121 119 117
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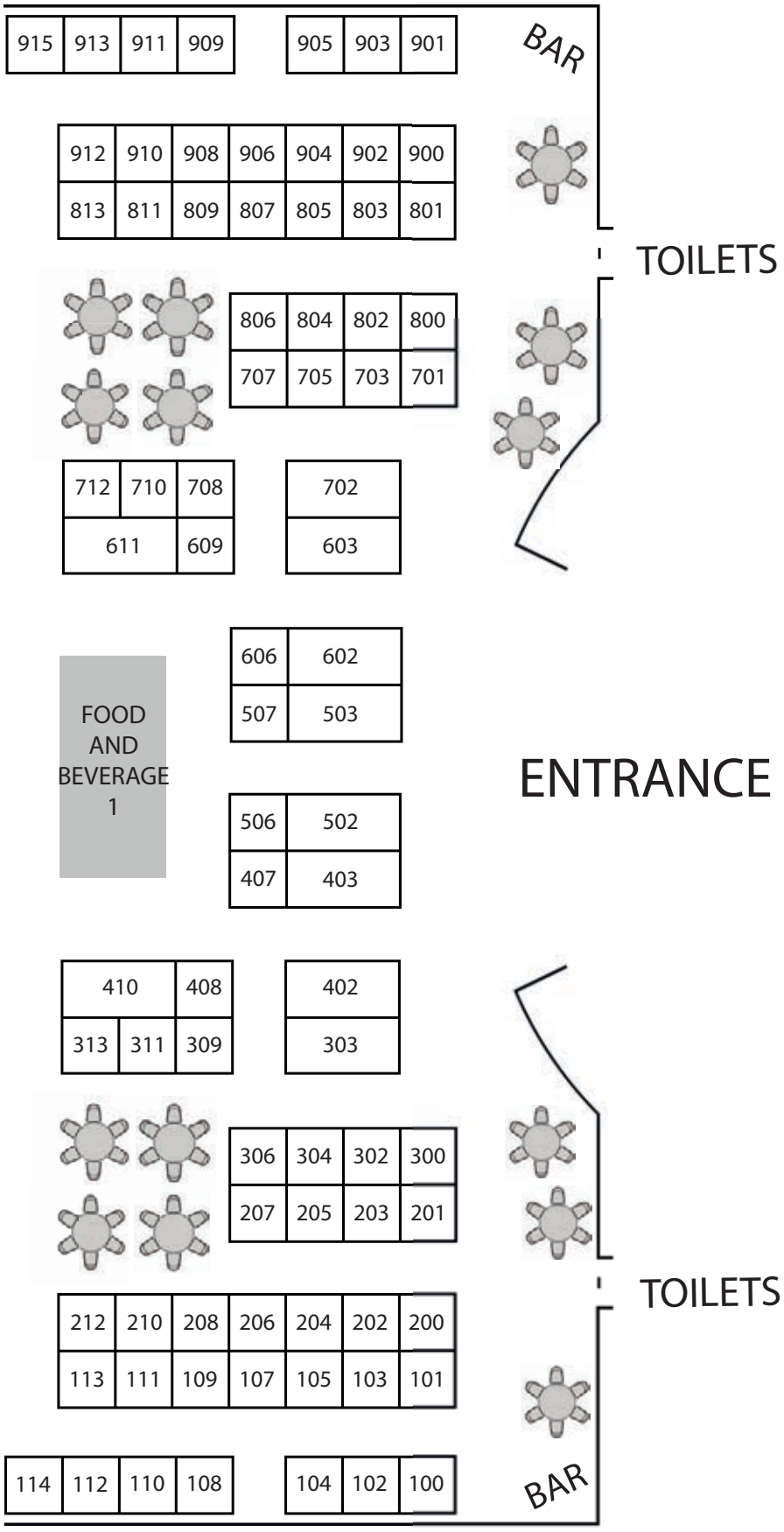
136 134 132
126 124 122 120 118 116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611 609
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507 503
FOOD AND BEVERAGE 1
ENTRANCE
506 502
407 403
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TOILETS
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114 112 110 108
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South Korea: Hanil Cement to deploy AI drones for inspections

Hanil Cement will deploy drones equipped with artificial intelligence (AI) for inventory management and equipment inspections at its Danyang plant, according to local press. 10 employees have obtained piloting qualifications to operate the drones. After a trial run, the drones were deployed in April 2026.

The company said that the industrial drones are equipped with AI software that can recognise spaces and convert them into 3D maps, allowing the drones to fly safely in narrow indoor areas and accurately measure inventory volumes stored in warehouses. Hanil Cement said that one of the main advantages of the drones is improved safety, as they can be deployed instead of workers to inspect dusty, confined spaces and high structures, reducing the risk of asphyxiation, accidents and falls. The drones can also measure pipe thickness and assess corrosion or wear during inspections. They also reportedly save time and money by eliminating the need for external inventory measurement services and temporary scaffolding for equipment inspections. Inventory checks, previously conducted once per quarter, are now carried out monthly.

A spokesperson from Hanil Cement said "The drones introduced for worker safety are also helping with efficient plant operations. We plan to gradually expand the scope of operations by adding functions such as thermal imaging to the drones and sharing them among plants."

Source: Hanil Cement.

India: Conflict in the Middle East expected to raise cement production costs

The ongoing conflict in the Middle East is expected to increase cement production costs in India as rising imported fuel prices impact the sector, according to local press. Prices of imported petcoke and coal have already increased by 11% and 7% respectively since the start of the conflict, with further volatility expected. India relies heavily on imported petcoke, with around 50% coming from the US and about 30% from West Asian countries.

Producers are expected to increase the use of domestic fuels to offset higher import costs. Refiners are also increasingly focusing on gas production, which could limit the availability of refinery byproducts such as petcoke – cement companies are reportedly in conversation with refineries to tackle the issue.

China: KHD commissions Pyrorotor system at Conch Group's cement plant

KHD Humboldt Wedag has commissioned a Pyrorotor alternative fuels (AF) system on a 5000t/day production line at Conch Group's Baoshan cement plant in Yunnan Province. The project marks the second installation of the technology in China. During commissioning, the system processed high-moisture biomass and a mix of municipal waste, achieving a feed rate of 18t/hr while maintaining kiln stability. No material build-up at the kiln inlet was recorded, and the unit operated at higher rotational speeds to adapt to challenging fuel conditions.

KHD's commissioning supervisor A Timuçin Tuzcuoğlu said "The Pyrorotor unit handled the adverse fuel conditions without a problem," adding that further improvements could be achieved with higher-quality fuels.

Following commissioning, the plant plans to test additional biomass feedstocks, expand AF preparation capacity and explore the use of externally-sourced AF. It also intends to showcase the installation to officials from other plants within Conch Group.

Indonesia: Conversion of Indarung I plant to cultural site proposed

Culture minister Fadli Zon has proposed converting the former Indarung I cement plant in Padang, West Sumatra, into an educational and cultural space. The plant was run by state-owned cement producer PT Semen Padang for nearly 90 years until 1999. The plant's archives from 1910-1972 were registered with UNESCO's Memory of the World Committee for Asia and the Pacific in 2024. The Indonesian government has also designated several buildings at the site, seen below, as national cultural heritage.

Zon said "This site can be utilised as an amphitheatre to hold exhibitions and theatrical performances. Having been recognised as a cultural heritage site, this place can be reactivated as an art space for artistic and cultural expression."

Source: Fadli Zon via X.

Philippines: Preheater upgrade at CRH's Bulacan plant

DAL Engineering recently completed a cyclone modification project at CRH's cement plant in Bulacan, covering full engineering scope from design through to on-site technical supervision, according to a post on social media. The work focused on upgrading the preheater top cyclone to improve pyro-process efficiency and operational stability. The company said that execution involved close coordination with the plant's operations team to minimise downtime and work within the constraints of the existing infrastructure.

On-site supervision covered the full installation sequence: dismantling of the existing cyclone; new unit installation; riser duct modifications; welding; geometric alignment; and structural adjustments as conditions required. DAL said that the upgraded system has since achieved stable operation.

Source: Rodel G Lelay via Linkedin.

Bangladesh: Cement producers reject overcapacity claims

Cement producers have rejected claims by the US Trade Representative over alleged overcapacity in the sector, stating that production reflects domestic demand driven by infrastructure projects and economic growth, according to local press. The comments come amid a US trade investigation into Bangladesh and more than a dozen other countries, reportedly examining whether their policies and production practices contribute to global overcapacity that could harm American manufacturing. In its complaint, the US cited unused capacity in Bangladesh as evidence of 'unfair trade.'

The Bangladesh Cement Manufacturers Association said that the country has 41 plants with a combined capacity of 86.0Mt/yr and domestic demand of 39.8Mt in 2025, up by 6% year-on-year. The country exports a minimal amount of cement, with around 20,000t/yr going to India. The association said that installed capacity reflects long-term planning and seasonal demand rather than overproduction. The deputy managing director of Fresh Cement, Mohammod Khourshed Alam, said that cement demand in Bangladesh has grown at an average annual rate of 8%, and that if this continues at the current rate, the existing capacity could be fully absorbed within eight to nine years.

Alam said "Bangladesh's cement capacity should not be interpreted simply as overcapacity, as the sector is preparing for future demand in a growing economy. In a country of 170 million people with ongoing urbanisation and infrastructure development, production capacity must anticipate future demand."

Kiran S Pillai, Vastuta Think Tank

A CRUCIAL 50KM

How 50km can make the difference between profit and loss in the Indian cement market.

In the cement industry, distance is not an abstract variable. It is a hard commercial boundary that decides whether a plant flourishes, struggles, or quietly bleeds cash. Unlike many industrial products, cement is heavy, low in value per unit weight, and intolerant of inefficient movement. As a result, a seemingly modest difference in distance - sometimes as little as 50km - can determine whether a producer operates profitably or not.

The variables

For decades, cement pricing models focused primarily on production economics. Efficiency, fuel mix, kiln technology and labour costs were assumed to be the decisive factors. Logistics was treated as a downstream function, a cost to be optimised after production decisions have been made. That assumption no longer holds. In many markets today, logistics costs exceed energy costs and, in some cases, even rival raw material expenses.

The core problem lies in the cement itself. A tonne of cement occupies space, demands careful handling and offers very little margin to absorb inefficiency. Unlike steel, chemicals or refined fuels, cement cannot travel long distances over land without losing economic value. Every additional kilometre increases fuel costs, labour costs, vehicle wear, tolls and time. The compounding effect of these variables is often underestimated by planners, who often focus on annual averages rather than route-level realities.

Distance also reshapes competitive behaviour. Producers with a logistical advantage can price aggressively in contested markets, knowing competitors cannot follow without eroding their own margins. This creates invisible exclusion zones around efficient plants, where rivals are structurally discouraged from competing. Such dynamics are rarely captured in market share analyses but are well understood by operators on the ground.

An Indian example

In several Indian cement markets today, a 50km difference in plant location can materially change profitability. This is not theoretical. In southern India, road freight costs for cement are typically US$0.06-0.08/t/km depending on diesel prices, route conditions and backhaul availability. If a plant is located 100km from its primary market, delivered freight costs work out at roughly US$7.70/t. If another plant supplying the same city is 150km away, freight costs could reach about US$11.50/t. The 50km gap creates a disadvantage of ~US$3.80/t.

Trucks queue outside a cement plant in Uttar Pradesh. **Source:** PradeepGaurs / Shutterstock.com.

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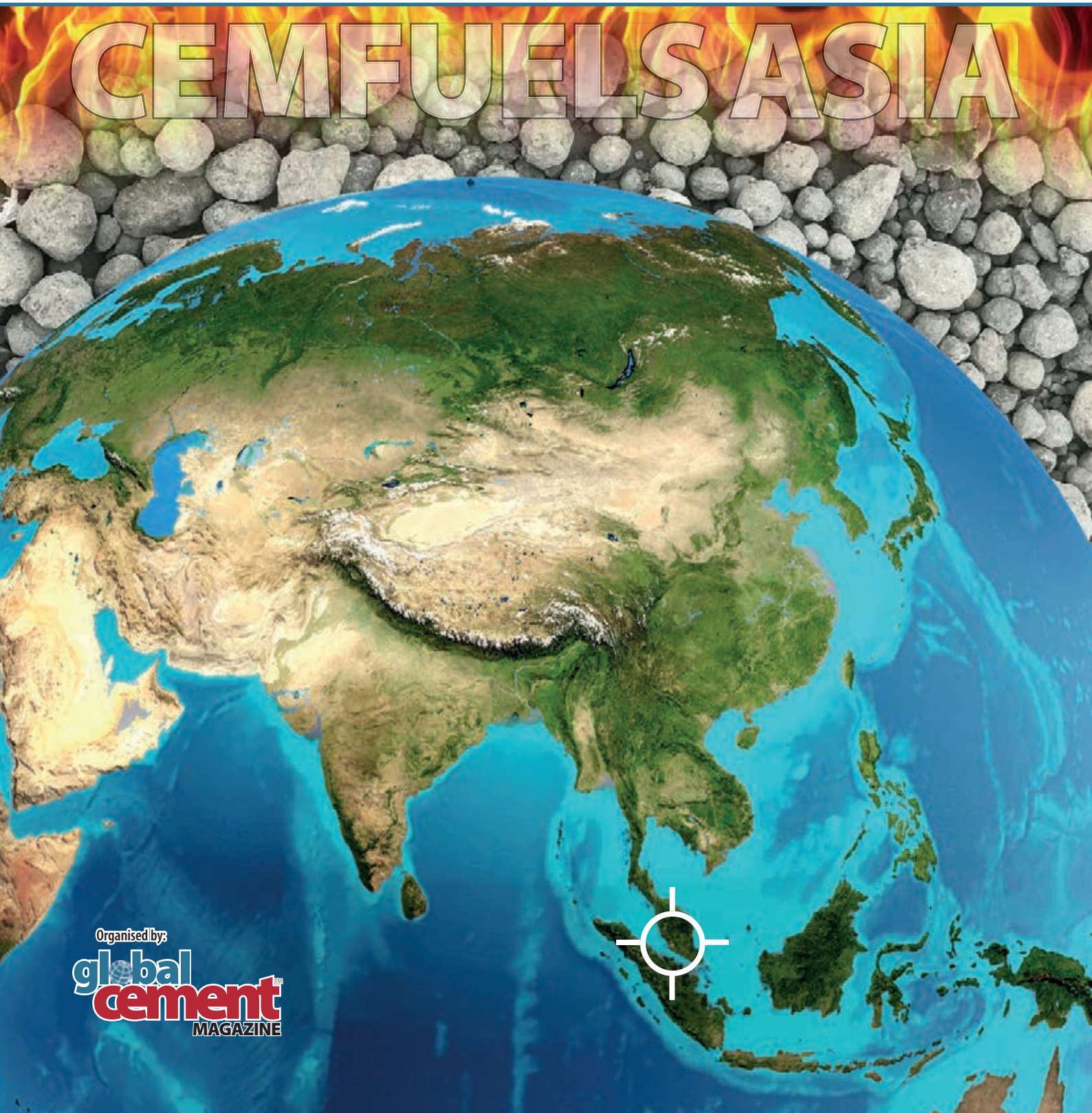

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In a market where EBITDA margins are US$5.50-9.90/t depending on demand conditions, a structural US$3.80/t disadvantage can eliminate a large share of operating margin. In weak cycles, it can push a plant into loss, even if its kiln efficiency and fuel mix are competitive.

This is visible in markets such as Kochi and Bengaluru. Grinding units located within a 100km radius of these cities are able to respond quickly to price changes and to defend volumes. Plants located 140-160km away often find that they can enter the market only by sacrificing margins. Over time, this shapes where each producer chooses to compete.

Urban congestion intensifies the gap. The last 20-30km inside major cities introduces unpredictable delays. Truck entry restrictions, toll plazas, unloading window limits and traffic congestion reduce fleet productivity. A route that looks commercially viable on paper can become inefficient once real turnaround times are factored in. Higher idle time increases per tonne logistics cost and reduces daily trip counts.

Road quality also plays a decisive role. Two routes of identical distance can have vastly different economics depending on the surface condition, gradient and congestion. Poor road infrastructure increases tyre wear, maintenance costs and breakdown frequency. It also limits payload optimisation, which forces trucks to carry less than their rated capacity to avoid damage or penalties. Over thousands of trips, these inefficiencies translate into material cost disadvantages that no amount of kiln optimisation can offset.

Fuel volatility further magnifies structural distance differences. When diesel prices rise, the impact is multiplied over longer routes. A plant closer to the market absorbs the shock more easily. A plant further away sees the increase compounded across every tonne despatched. Over a year, this translates into sustained margin erosion, not a temporary blip.

Administrative geography adds another layer. In India, state borders still influence compliance, documentation checks and informal friction. A 50km route extension that crosses a state boundary can introduce additional costs and delays. Even when formal entry taxes are rationalised, enforcement patterns and inspection frequency vary. Distance in such cases is both physical and regulatory.

Inventory economics also shift with distance. Cement has a limited storage window if quality is to be preserved. Plants located further from consumption centres must maintain higher buffer stocks to account for transit delays and market uncertainty. This ties up working capital and increases storage costs. Plants closer to markets can operate with leaner inventories and faster turnover, which strengthens cash flow during demand swings.

Market responses

Rail connectivity can partially offset long road distances, but only for plants with dedicated sidings and predictable rail access. In states such as Gujarat and Chhattisgarh, plants with strong rail infrastructure can move bulk volumes efficiently over longer distances. However, once cement reaches the nearest railhead, it still faces last mile road movement. Shared terminals, scheduling delays and demurrage charges often reduce the theoretical savings.

Coastal grinding strategies illustrate how producers are responding to these realities. Along India's western coast and in parts of the Gulf, companies have established grinding units close to ports and urban clusters. Clinker is moved in bulk over long distances by sea, which reduces the per tonne transport cost. Final cement distribution then occurs within a tight road radius around consumption centres. By compressing the most expensive segment of transport, these units reduce structural freight exposure. By moving bulk transport upstream and final distribution downstream, producers compress the most expensive segment of the supply chain. Similarly, investments in bulk terminals, dedicated fleets, and digital route optimisation tools reflect a growing recognition that logistics is now a core competitive function.

Future capacity planning increasingly reflects these constraints. Limestone quality and kiln efficiency remain important, but proximity to demand clusters now carries equal weight. In several Indian states, new grinding capacity has been added closer to cities rather than expanding large integrated plants further inland. The objective is not only capacity growth, but freight optimisation.

Concluding remarks

When margins are healthy, a 50km disadvantage may appear manageable. When demand slows, prices soften or fuel rises, that same 50km becomes decisive. It determines whether a producer can hold its price, defend volume or operate at sustainable margins. In the cement business, location is not a secondary variable. It is a structural determinant of profitability.

For policymakers, this has implications as well. Infrastructure investments, urban planning decisions and transport regulations directly shape industrial competitiveness. When a highway bottleneck or port congestion adds 20km of time and cost to a route, it silently reallocates market power within the industry. Understanding these effects is essential to design policies that support domestic manufacturing rather than unintentionally penalising it.

Saudi Arabia: Southern Province Cement reports net loss for 2025

Southern Province Cement reported a net loss of US$13m for the year ending 31 December 2025, compared to a net profit of US$51m in 2024. The company also reported an operating loss of US$11m in 2025, compared to an operating profit of US$60.5m in the previous year. Southern Province Cement attributed the decline in profitability to lower revenues and higher cost of sales, driven by increased input costs and lower utilisation rates of production lines. Additional factors included inventory adjustments related to raw materials, as well as the impact of revised depreciation for assets linked to old production lines at the Jazan cement plant, which were replaced by a new production line.

Algeria: Investments strengthen position as cement exporter

Algeria has reportedly transitioned from a cement importing country to a net exporter following major investments in new cement plants and expanded production capacity, according to local press.

The country's installed cement capacity is around 42Mt/yr, while domestic demand is estimated at between 20Mt/yr and 30Mt/yr. It exports around 10Mt/yr. Recent export activity was reported at the Port of Béjaïa on 23 March 2026, where ships were loading both bagged and bulk cement for export markets. One vessel loaded 10,000t of cement, while another loaded 46,200t. The Port Authority did not provide details on the destination of the exports.

Türkiye: Limak Cement produces country's first LC3 cement at Trakya plant

Limak Cement has produced and certified Türkiye's first limestone calcined clay cement (LC3) at its Trakya plant, according to a social media post by the producer. It said that the cement offers 'high performance with a lower CO_2 footprint' than other cements in its existing product portfolio. The company completed certification of the product as CEM II/A-M (Q-LL) 52.5 N calcined clay cement under the EN 197-1 standard.

Nigeria: Dangote exported 1Mt of clinker from Nigeria to Cameroon and Ghana in 2025

According to Dangote Cement's audited financial statements, the company exported 970,100t of clinker to Cameroon and Ghana in 2025, shipped via 34 vessels. This volume represents a 7% increase compared to 2024. Cameroon and Ghana accounted for 69% of Nigeria's clinker exports, while total clinker exports reached 1.4Mt in 2025, up by 19% year-on-year.

The clinker shipments helped to sustain production at Dangote Cement's Cameroon-based subsidiary, which saw local sales fall by 14% in 2025, with volumes from the 1.5Mt/yr-capacity Douala plant declining to 1.2Mt from 1.4Mt in 2024.

Despite the weaker performance in 2025, Dangote Cement expects demand in Cameroon to improve in 2026, supported by ongoing infrastructure projects such as the Douala–Yaoundé highway and other road and bridge developments.

The company is also considering expanding its production capacity in Cameroon, either by expanding the existing Douala plant or reviving the long-delayed Nomayos cement plant project near Yaoundé. However, this project has been on hold for more than a decade. This forms part of a broader expansion plan across several African countries under a US$1bn contract signed with Sinoma Engineering in February 2026.

Türkiye: Türkçimento calls for CBAM revisions to reflect actual emissions data

The Turkish Cement Manufacturers' Association (Türkçimento) has issued a strategic statement addressing the EU's carbon border adjustment mechanism (CBAM), calling for EU recognition of Türkiye's national monitoring, reporting and verification (MRV) emissions data to ensure fair competition. The association warned that current EU CBAM default emission values may overstate actual emissions from Turkish cement producers, potentially increasing carbon costs from around €20/t to €80/t of clinker. It said that this could threaten the economic sustainability of exports to the EU.

Türkçimento CEO Volkan Bozay said that Türkiye's cement sector has operated within an EU-aligned MRV system since 2015 and that low-emission dry-process kilns are used at all of its facilities. He said that actual export data for exports to the EU during the CBAM transition period showed that emissions for grey cement clinker are around 0.88t of CO_2 per tonne of cement, while the default value of 1.551t of CO_2 per tonne is applied to Türkiye under the 'other countries' category. He said the difference creates additional costs that do not reflect actual emission performance and could ultimately increase prices for EU consumers.

He added "To prevent CBAM from becoming a *de facto* trade barrier, national values based on EU-aligned MRV data should be used instead of general 'other countries' default values. Until the verification infrastructure becomes fully operational, actual emission data should be taken as the basis and disproportionate financial burdens should be avoided. Otherwise, as a system that fails to distinguish between low-carbon production and the most carbon-intensive production, CBAM will not effectively support low-carbon manufacturing and may instead function as a non-tariff technical barrier."

Saudi Arabia: Najran Cement secures financing for grid connection project

Najran Cement has secured US$14m in bank financing from Saudi National Bank to support its electrical grid connection project. The financing was obtained through Shariah-compliant facilities and will be repaid over a period of two years in annual instalments, including a grace period of six months.

Najran Cement announced that it had awarded a contract for the project to Sinoma International Engineering earlier in March 2026. The project is intended to improve energy efficiency and reduce reliance on liquid fuels for power generation at its Sultana plant under the Liquid Fuel Displacement programme.

Source: Cimenterie Nationale.

CEO of Türkçimento, Volkan Bozay, says that Türkiye is at an unfair disadvantage. **Source:** Türkçimento.

Lebanon: Cimenterie Nationale halts cement production

Cimenterie Nationale, producer of Al Sabeh Cement, has announced that it will cease cement production and delivery operations at its Chekka plant after more than 70 years of activity, and has asked its employees 'to stay at home,' according to local press. The company said it had suffered heavy losses in recent years due to an inability to operate its quarries, after local authorities reportedly refused to grant it the necessary permits.

In 2024, Lebanon's Council of State issued a final decision confirming the company's right to obtain the permit, but the decision has not yet been implemented by the government. Cimenterie Nationale said it submitted a new application in June 2025 for a 10-year permit, but approval has still not been granted.

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These pages give *Global Cement's* monthly review of global cement prices - in US$ for easy comparison. Some price information is only available to subscribers to *Global Cement Magazine*. Subscribe on Page 80. Subscriber prices in this issue come from Vietnam, The Gambia, Benin, Burkina Faso, Peru, Nigeria, Sri Lanka, Philippines and Kazakhstan. Prices are for metric tonnes unless otherwise stated. US$ conversions from local currencies are correct at the time of publication.

China: The average price of cement across China was US$43.56/t on 9 April 2026. This represents a 1% month-on-month increase from US$42.98/t on 9 March 2026.

Egypt: Ex-works cement prices as at 9 April 2026 from www.cementegypt.com: Ordinary Portland cement cost between US$65.83/t (Building Materials Industries) and US$73.73/t (Sinai Cement). White cement cost US$102-103/t (various manufacturers). Blended cement prices were between US$53.04/t (Sinai Cement) and US$64.33/t (Arab Cement) Sulphate-resistant cement cost US$69.78/t (National Cement company in Beni Suef).

EU ETS: The price of a permit to emit one tonne of CO_2 under the EU Emissions Trading Scheme (ETS) has fallen to €71.53/t on 7 April 2026. This represents a 0.9% week-on-week decrease from €72.20/t on 31 March 2026, a 1.3% month-on-month increase from €70.59/t on 8 March 2026 and a 14% year-on-year increase from €62.84/t on 7 April 2025.

Malaysia: The average price of ordinary Portland cement (OPC) saw a 0.8% increase in March 2026 compared to February 2026, with an average price of US$6.41/bag (50kg). This is a 0.4% decrease compared to March 2025, when cement cost US$6.44/bag, according to the Department of Statistics Malaysia.

Pakistan: According to data from the Pakistan Bureau of Statistics, the average retail price per bag of cement (50kg) in northern regions for the week ending 2 April 2026 was US$5.32. This is a year-on-year increase of 6.5% from April 2025. Prices in southern regions were similar, with the average retail price of US$5.38/bag, representing a year-on-year increase of 8%.

Honduras: A US$0.26/bag (50kg) increase in the price of cement took effect on 16 March 2026. Silvio Larios, manager of the Honduran Chamber of the Construction Industry, said that the increase was related to the rise in fuel prices caused by the conflict in the Middle East.

India: Cement producers prepared to increase prices from 5 April 2026 due to increased packaging and fuel costs. The increase will be around US$0.54/bag in the south and US$0.22-32 in other regions. Companies reportedly face total increased costs of US$2.70-3.24/t from fuel and packaging.

Bangladesh: Cement prices have reportedly increased by US$0.08-0.16/bag (50kg) due to the rising price of raw materials, as well as higher freight and transportation costs. As of 15 March 2026, cement cost US$3.83-4.28/bag. President of the Bangladesh Cement Manufacturers Association and director of Premier Cement Amirul Hoque said that prices of all raw materials had increased by 30-40% in the global market. He said that the price of clinker had increased to US$58/t from the previous US$42/t, leading companies to adjust prices.

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Effects of the Iran War on the global cement industry...

Robert McCaffrey Editorial Director, ***Global Cement Magazine (rob@propubs.com)***

Contents
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I suspect that it may have been one of the most momentous telephone calls of recent decades. Someone in Iran who knew the movements of the very top leadership of the country called or texted their handler in Israel and informed them that the Supreme Leader and several of his top officials were meeting in Tehran. The decision was taken to act on the information. At some point the US was informed. At some later point, the US decided to become involved in what has come to be known as the Iran War[1] (Marco Rubio said "We knew that that would precipitate an attack against American forces, and we knew that if we didn't pre-emptively go after them before they launched those attacks, we would suffer higher casualties.") Presumably there was a pre-existing list of targets in Iran and the bombing quickly started (unfortunately one of them turned out to have been part of an army base that had been turned into a school for girls, and which was obliterated by Tomahawk missiles, killing around 170).

Iran is a proud country with more than 6000 years of history, significant oil and gas wealth, a population of 90m people dispersed over an area as large as France, Germany, Spain, and the UK combined, total military personnel of up to a million, relatively recent experience of fighting a multi-year conflict (the 1980-88 Iran-Iraq War in which 500,000 people were killed[2]), a plethora of soft targets within missile and drone range, and complete control of the Straits of Hormuz. This is not a soft target. However, the country's fanatical and hard-line theocratic rulers had made progress towards obtaining nuclear technology (despite US bombing during the '12-day War' of 2025), and had expressed their intention to eliminate Israel. Whatever your views on the reasons for and wisdom or otherwise of the conflict, it's impossible to think that this is going to be over soon. Russia's war on Ukraine has been going on for more than four years now. It's even more unlikely that the Straits of Hormuz will be opened quickly, and that matters to the global cement industry for many reasons.

As a consequence of the closure of the Strait, oil and gas prices have spiked - but all energy prices have risen, since in the absence of the 20% of the world's oil and gas that passed through the strait, demand for all other forms of energy has increased too. Unfortunately, an energy price spike is the last thing that weak global economies need right now – and it will have significant echoing effects on the global cement industry, too. As we heard in the three articles in this issue about the US cement industry, the inflationary effects of the Iran War (coupled with the inflationary effects of Mr Trump's tariffs) mean that interest rates are unlikely to fall in the US (and in many other countries) and may yet increase. This will dampen economic activity and construction markets in particular, reducing demand for building materials including cement. So, we are likely to have a cement demand shock, on the back of a softening in global economic activity. Energy shocks have been known to cause severe recessions.[3]

The sharp increase in energy prices will have other knock-on effects in the global cement industry. The process of diversifying your energy mix – especially to include locally-sourced alternative fuels (AF) – is looking increasingly wise. Even cement companies in Saudi Arabia, which had previously had access to cheap fuel oil, will be scrambling to use AF if the country's refineries are targeted and put partially out of action. (If Iran targets Saudi Arabia's oil infrastructure, then the global energy price spike will go through the roof). The rest of us, who always had to pay the full market price for energy, will find new pain with every new energy bill. AF will be given a massive boost around the world, and I predict a newfound interest in landfill-mining for energy (we organised a series of conferences on this starting in 2010).

The other knock-on effect will be on the cement industry's decarbonisation and sequestration efforts. Before the start of the Iran War, politicians in the EU, including Germany's Chancellor Merz, had started to hint that the EU ETS might be loosened in the hope of increasing Europe's competitiveness. CO_2 prices dropped immediately. With energy prices increasing, you can expect those voices to become louder. Lower CO_2 prices (and/or extended free allowances) will undercut the industry's resolve to decarbonise, since the savings will just not be there - despite urgency for the climate's sake. On the other side of the coin, energy-intensive carbon capture processes will become disadvantageous. That's not to say that CCUS will not happen (it may just be delayed), but less energy-intensive carbon capture technologies will now be even more strongly favoured. No doubt there will be other unforeseen consequences of the Iran War.

1 https://en.wikipedia.org/wiki/2026_Iran_war

2 https://en.wikipedia.org/wiki/Iran–Iraq_War

3 https://en.wikipedia.org/wiki/1970s_energy_crisis

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