

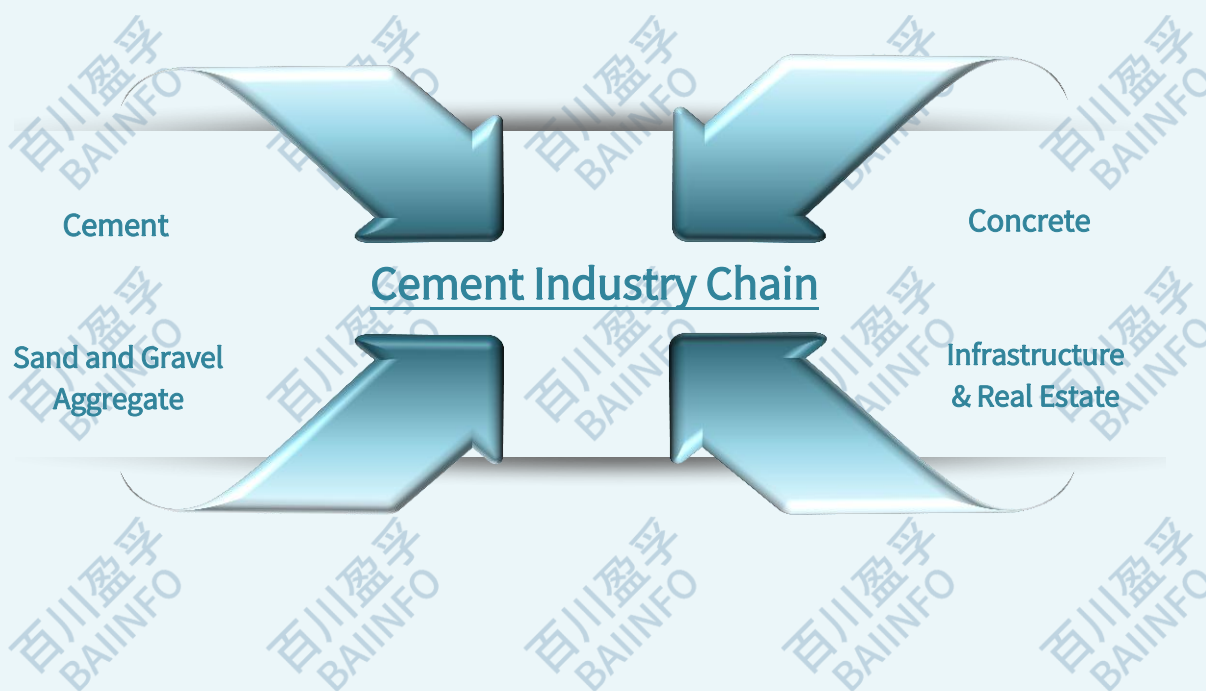
CEMENT
INDUSTRY
WEEKLY

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Issue 22-2 / Jan. 13, 2022



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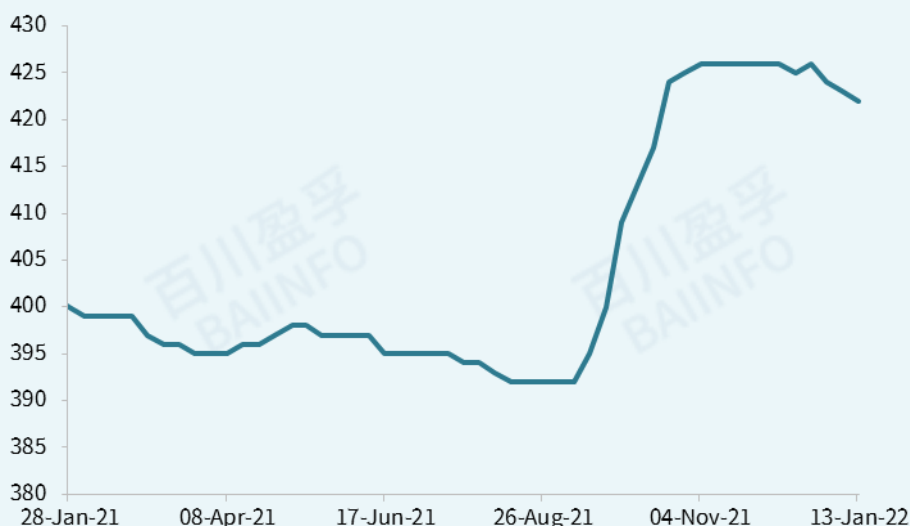
Infrastructure & Real Estate

Concrete

➤ Market Review

This week, trading price of domestic concrete market declined amid slack demand. In East China, the overall construction schedule was slowed down with flat demand and unsmooth shipment. In Fujian, Anhui, Jiangxi, Shandong and Zhejiang, prices of commercial concrete ran downward influenced by the price downtrend of cement. In South China, operation rate of construction projects decreased in many regions, shrinking the demand for concrete. In Hainan and Guangdong, concrete prices stayed sluggish. In Central China, concrete mixing stations delivered goods cautiously, and the delivery volume dropped over last year. In Hunan and Hubei, concrete prices continued to ramp down. In Southwest China, affected by the rainy weather, air pollution alert and financial strain at downstream plants with the coming of the Spring Festival, the demand for concrete was weakened. The inventory of cement clinker stayed high. Delivery volume of concrete remained low, and the price competition during off-season was aggravated. In Guizhou and Sichuan, concrete prices went down. In North China, delivery volume showed downward tendency as a whole. In Tianjin, concrete price kept flat. In Northeast China, trading orders of concrete were rarely seen. Price of commercial concrete stabilized. In Northwest China, concrete price didn't change dramatically impacted by the air pollution alert and the pandemic.

Concrete Average Price (RMB/m³)



➤ Forecast

Concrete price nationwide will mainly drop, and cement prices in all regions drop back slightly. In East China, house-building industry is stagnant. Downstream construction schedule is slow, except that some key projects are catching up on the progress in some regions. Thus, the demand for concrete is hard to be improved. Price of commercial concrete is expected to move down constantly. In Central China, concrete mixing stations deliver goods cautiously and selectively. Short-term concrete price will keep on falling. In North China, downstream construction sites shut down due to the air pollution alert, and thus concrete plants consecutively suspend producing amid tepid demand. Price of commercial concrete is predicted to decline. In Northwest China, due to blocked transportation and curbed supply of feedstock, concrete delivery will keep on suspending. Concrete price may stay flat. In Northeast China, no trading orders are seen at the market, with concrete price holding stability. In East China, concrete price is estimated to go down by RMB 5-15/m³.

➤ Regional Market

East China

In East China, concrete price fluctuated down amid lukewarm demand.

Price Changes in East China (C30) (RMB/m³)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Fujian	435	431.00	430	430.00	1.16%	0.23%	2.11%	1.16%
Anhui	513	519.40	521	522.60	-1.54%	-2.29%	0.00%	-1.91%
Jiangxi	490	493.20	494	494.00	-0.81%	-0.81%	10.11%	-0.81%
Jiangsu	519	519.00	519	520.60	0.00%	-1.89%	2.37%	-0.38%
Shandong	493	493.80	494	494.80	-0.20%	-1.00%	3.14%	-0.40%
Shanghai	549	549.00	549	557.00	0.00%	-1.79%	-0.72%	-1.79%
Zhejiang	523	525.40	526	526.80	-0.57%	-0.19%	2.95%	-0.76%

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South China

In South China, concrete price showed ups and downs with ordinary market demand.

Price Changes in South China (C30) (RMB/m³)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Hainan	469	465.00	464	464.00	1.08%	1.08%	4.92%	1.08%
Guangxi	405	405.00	405	410.60	0.00%	-1.46%	-0.25%	-1.70%
Guangdong	538	546.00	548	549.60	-1.82%	-4.10%	-1.47%	-2.18%

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Central China

In Central China, concrete price registered ups and downs with the trading market stagnant.

Price Changes in Central China (C30) (RMB/m³)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Hunan	451	453.40	454	457.20	0.00%	-2.17%	2.73%	-0.66%
Henan	424	424.80	425	425.80	0.00%	0.00%	3.16%	-0.24%
Hubei	440	440.00	440	440.00	-0.45%	-1.13%	-1.57%	-0.45%

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Southwest China

In Southwest China, concrete price fell back slightly amid flat demand.

Price Changes in Southwest China (C30) (RMB/m³)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Yunnan	376	377.60	378	378.80	0.00%	-2.08%	-3.59%	-0.53%
Guizhou	321	321.00	321	321.00	-5.61%	-5.61%	0.66%	-5.61%

Chongqing	450	450.00	450	466.00	0.00%	-6.25%	4.65%	0.00%
Sichuan	478	478.80	479	485.40	-0.21%	-2.65%	1.71%	-0.42%

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North China

In North China, demand for concrete continued to move down with dropping temperature. The market was in the usual off-season.

Price Changes in North China (C30) (RMB/m³)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Hebei	388	388.00	388	388.00	0.00%	-0.51%	4.30%	0.00%
Inner Mongolia	320	320.00	320	320.00	0.00%	3.23%	13.48%	0.00%
Tianjin	501	501.00	501	501.00	-2.00%	-2.00%	4.25%	-2.00%
Beijing	441	441.00	441	441.00	0.00%	0.00%	-2.22%	0.00%
Shanxi	367	367.00	367	367.00	0.00%	-0.81%	3.97%	0.00%

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Northwest China

In Northwest China, commercial concrete prices sustained stability.

Price Changes in Northwest China (C30) (RMB/m³)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Xinjiang	345	345.00	345	345.00	0.00%	0.00%	0.00%	0.00%
Shaanxi	457	457.00	457	457.00	0.00%	-0.44%	7.28%	0.00%
Qinghai	413	413.00	413	413.00	0.00%	0.00%	1.23%	0.00%
Ningxia	314	314.00	314	314.00	0.00%	2.28%	5.72%	0.00%
Gansu	369	369.00	369	369.80	0.00%	-0.27%	1.93%	0.00%

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Northeast China

In Northeast China, concrete market stayed stable.

Price Changes in Northeast China (C30) (RMB/m³)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Heilongjiang	355	355.00	355	355.00	0.00%	5.65%	7.25%	0.00%
Jilin	383	383.00	383	383.00	0.00%	2.68%	2.68%	0.00%
Liaoning	336	336.00	336	336.00	0.00%	0.00%	19.57%	0.00%

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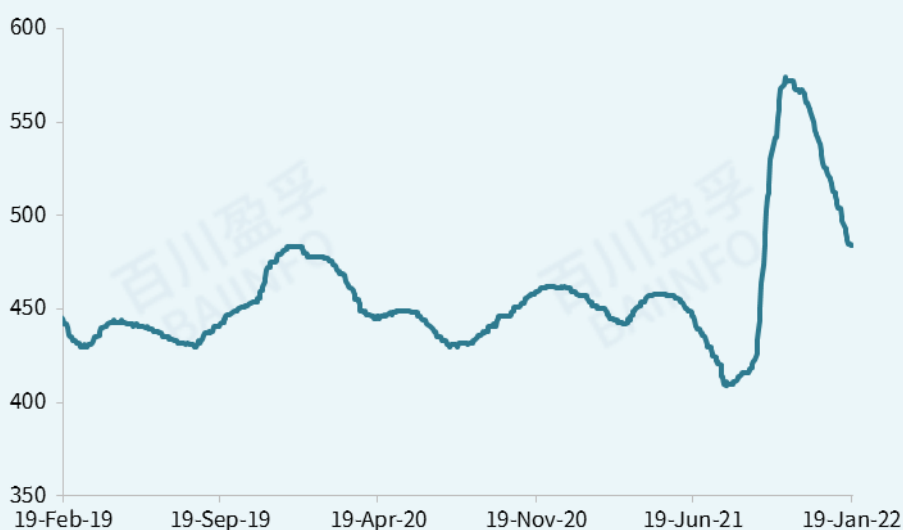
Upstream Market

Cement

➤ Market Review

Domestic cement market moved down amid sluggish demand. In East China, cement market ran weak amid falling sales MoM. In Central and South China, cement market declined, impacted by soft demand and low-priced cement from surrounding areas. In Southwest China, cement market continued falling back amid weak demand. In Northeast, North and Northwest China, cement market stabilized temporarily.

Cement Average Price (RMB/m³)



➤ Forecast

Cement market is anticipated to run weak next week. In the south, cement market falls widely. Inventory remains high. In the north, cement market edges down amid sluggish demand. Impacted by cold weather, most projects are basically finished. In East China, it is estimated that cement prices will decrease by RMB 20-30/T in mid-January.

➤ Regional Market

East China

In East China, mainstream cement trading prices declined amid poor trading performance.

Price Changes in East China (RMB/T)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Shanghai	550	567.14	570	597.14	-3.51%	-3.51%	-14.06%	-17.91%
Jiangsu	520	526.43	534	541.86	0.00%	-2.62%	-7.31%	-14.75%
Zhejiang	480	486.14	488	504.86	-0.62%	-1.64%	-13.04%	-21.31%
Anhui	513	516.29	522	524.86	0.00%	-1.72%	-5.35%	-5.35%
Fujian	448	452.43	459	462.57	0.00%	-2.40%	-7.44%	-27.04%
Jiangxi	526	528.14	531	558.14	0.00%	-0.94%	-8.20%	-12.62%
Shandong	566	566	566	573.14	0.00%	0.00%	-4.07%	4.04%

PS: P.O42.5 in Bulk

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South China

In South China, cement market operated weakly. In Guangdong, cement prices slid down amid soft demand. Sales fell, and inventory pressure was relatively huge. In Guangxi, projects were shut down successively, and cement demand was sluggish. In Hainan, cement prices kept steady amid ordinary trading performance.

Price Changes in South China (RMB/T)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Guangdong	481	489.71	493	514.43	-2.43%	-13.49%	-31.19%	-8.03%
Guangxi	456	460.71	470	490	-2.98%	-12.31%	-22.97%	-7.88%
Hainan	637	637	637	637	0.00%	0.00%	4.94%	0.00%

PS: P.O42.5 in Bulk

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Central China

In Central China, mainstream cement trading prices ran down amid ordinary demand.

Price Changes in Central China (RMB/T)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Hunan	470	480	490	491.43	-4.08%	-14.08%	-27.47%	-4.47%
Hubei	470	478.57	485	485	-3.09%	-11.99%	-21.40%	-3.09%
Henan	499	499	499	500.14	0.00%	-1.38%	-11.37%	-0.40%

PS: P.O42.5 in Bulk

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Southwest China

In Southwest China, cement prices dropped continuously. Near the Spring Festival, demand was weak. Projects were halted completely in some areas. Sales of cement plants were relatively depressed.

Price Changes in Southwest China (RMB/T)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Chongqing	526	530.29	531	539.57	-0.94%	-9.78%	-20.06%	-2.77%
Sichuan	471	500.57	528	528	-10.80%	-20.84%	-27.20%	-10.80%
Guizhou	501	504.86	508	509.43	-1.38%	-6.18%	4.38%	-1.76%
Yunnan	470	471.14	472	476.29	-0.42%	-6.75%	-15.32%	-1.88%
Tibet	482	482	482	482	0.00%	0.00%	-10.24%	0.00%

PS: P.O42.5 in Bulk

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North China

In North China, cement market registered ordinary performance.

Price Changes in North China (RMB/T)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Beijing	576	576	576	576	0.00%	0.00%	0.00%	0.00%
Tianjin	559	559	559	559	0.00%	0.00%	-0.89%	0.00%
Hebei	480	480	480	480	0.00%	0.00%	7.07%	0.00%
Shanxi	439	439	439	439	-1.91%	-2.84%	10.78%	-1.91%
Inner Mongolia	514	521.14	524	524	0.00%	0.00%	-1.23%	0.00%

PS: P.O42.5 in Bulk

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Northwest China

In Northwest China, cement market remained stable. Temperatures continued dropping. Downstream large projects were basically finished. Shipments were generally low. Trading volume was limited.

Price Changes in Northwest China (RMB/T)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Shaanxi	559	559	559	559	0.00%	-2.61%	-2.61%	0.00%
Gansu	519	519	519	520.71	0.00%	-2.19%	-2.19%	0.00%
Qinghai	484	484	484	484	0.00%	-0.38%	0.39%	0.00%
Ningxia	445	445	445	445	0.00%	0.00%	19.80%	0.00%
Xinjiang	447	447	447	447	0.00%	0.00%	7.23%	0.00%

PS: P.O42.5 in Bulk

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Northeast China

In Northeast China, cement market was weakly stable.

Price Changes in Northwest China (RMB/T)

Province	13-Jan-22	Average Price, This Week	6-Jan-22	Average Price, Last Week	WoW	MoM	QoQ	Year-to-date
Liaoning	450	450	455	455	0.00%	-7.22%	-21.33%	-1.10%
Jilin	492	492	492	492	0.00%	0.00%	8.11%	0.00%
Heilongjiang	533	533	533	533	0.00%	0.00%	6.49%	0.00%

PS: P.O42.5 in Bulk

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➤ Imp & Exp

Date	Import Volume (T)	Import Value (USD)	Export Volume (T)	Export Value (USD)
Nov. 2021	428,633.24	24,485,400	106,558.5	8,165,092
Oct. 2021	236,770.75	12,407,211	71,904.04	5,434,583

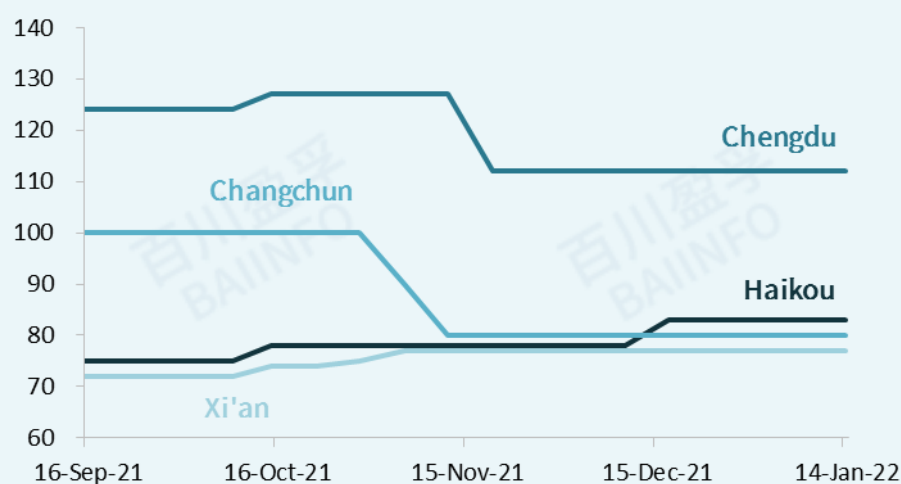
Sep. 2021	193,741.95	9,666,652	122,095.3	9,174,671
Aug. 2021	257,315.79	12,988,225	94,496.6	6,651,793
Jul. 2021	281,655.42	14,323,777	109,309.59	7,223,845
Jun. 2021	176,986.84	8,899,387	163,007.84	9,968,387
May 2021	288,603.40	14,644,577	218,473.61	12,917,311
Apr. 2021	188,094.28	9,366,666	256,971.38	15,718,724
Mar. 2021	142,070.96	6,805,148	309,444.95	18,192,613
Feb. 2021	146,186	7,090,279	121,907.28	7,043,107
Jan. 2021	616,056.01	28,360,726	256,695.66	15,791,621

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Sand and Gravel Aggregate

This week, domestic sand and gravel aggregate price kept on sliding down. River freight stayed unchanged temporarily, while ocean freight edged down by RMB 2/T. In the north, construction market entered into the slack season in winter. Supply of sand and gravel aggregate was flat due to low temperature, and most manufacturers sold inventory. Mining was curbed, and partial concrete mixing stations showed ordinary demand for sand and gravel aggregate. Thus, the output and sales volume of sand and gravel aggregate both reduced. In Xi'an, demand for sand and gravel aggregate was almost never seen due to the strengthened environmental protection control and blocked transportation. In the south, downstream market was hit by the resources flowed from the north so that downstream plants showed weak interest in stockpiling goods and intended to keep the price of sand and gravel aggregate firm. Next week, sand and gravel aggregate market nationwide is predicted to slide down. Among them, price of manufactured sand will edge down by RMB 2-3/T in East China.

Manufactured Sand Average Price (RMB/T)



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Downstream Market

Infrastructure & Real Estate

➤ Infrastructure

From January to November, the national fixed asset investment (excluding rural households) increased Y-o-Y. Among them, private investment in fixed assets was increased year-on-year. From a month-on-month perspective, investment in fixed assets (excluding rural households) increased in November.

By industry, the investment in the primary industry moved up, and the investment in the secondary industry ran up. The investment in the tertiary industry rose up Y-o-Y.

In the secondary industry, industrial investment increased year-on-year.

In the tertiary industry, infrastructure investment (excluding electricity, heat, gas, water production, and supply industries) increased Y-o-Y.

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➤ Real Estate

From January to November, the national investment in real estate development increased Y-o-Y.

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BAIINFO Cement Industry Chain Weekly Is Issued by the Research Center of BAI CHUAN INFO CO., LTD.**Registered office**

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