

WELCOME



TOKYO CEMENT GROUP

Sri Lanka Supply 2013

○ Capacity

		Operating Capacity
○ Tokyo Cement Group	- Trincomalee	1,500,000 MT
○ Tokyo Cement Colombo Terminal	- Colombo	500,000 MT
○ Holcim (Lanka) Ltd	- Puttlam	1,300,000 MT
○ Holcim (Lanka) Ltd	- Galle	500,000 MT
○ Holcim (Lanka) Ltd (Terminal)	- Galle	200,000 MT
○ Lafarge Cement	- Colombo	600,000 MT
○ Ultratech	- Colombo	900,000 MT
○ Italcementi	- Colombo	300,000 MT
○ TOTAL	-	5,800,000 MT

Sri Lanka Supply 2012

- Sales Quantity

Total Cement consumption 2012

Qty

- TOTAL

-

5.1 Million MT

Consumption of Cement

○ Demand for the past 5 years

Year	Qty	Growth
<i>2009</i>	<i>3,401,862</i>	
<i>2010</i>	<i>3,972,728</i>	<i>17%</i>
<i>2011</i>	<i>4,531,885</i>	<i>14%</i>
<i>2012</i>	<i>5,151,019</i>	<i>14%</i>
<i>2013(Est.)</i>	<i>4,864,554</i>	<i>-6%</i>

Imports of Raw Materials

- Vietnam
- India
- Other ASEAN Countries
 - Thailand
 - Indonesia
 - Malaysia



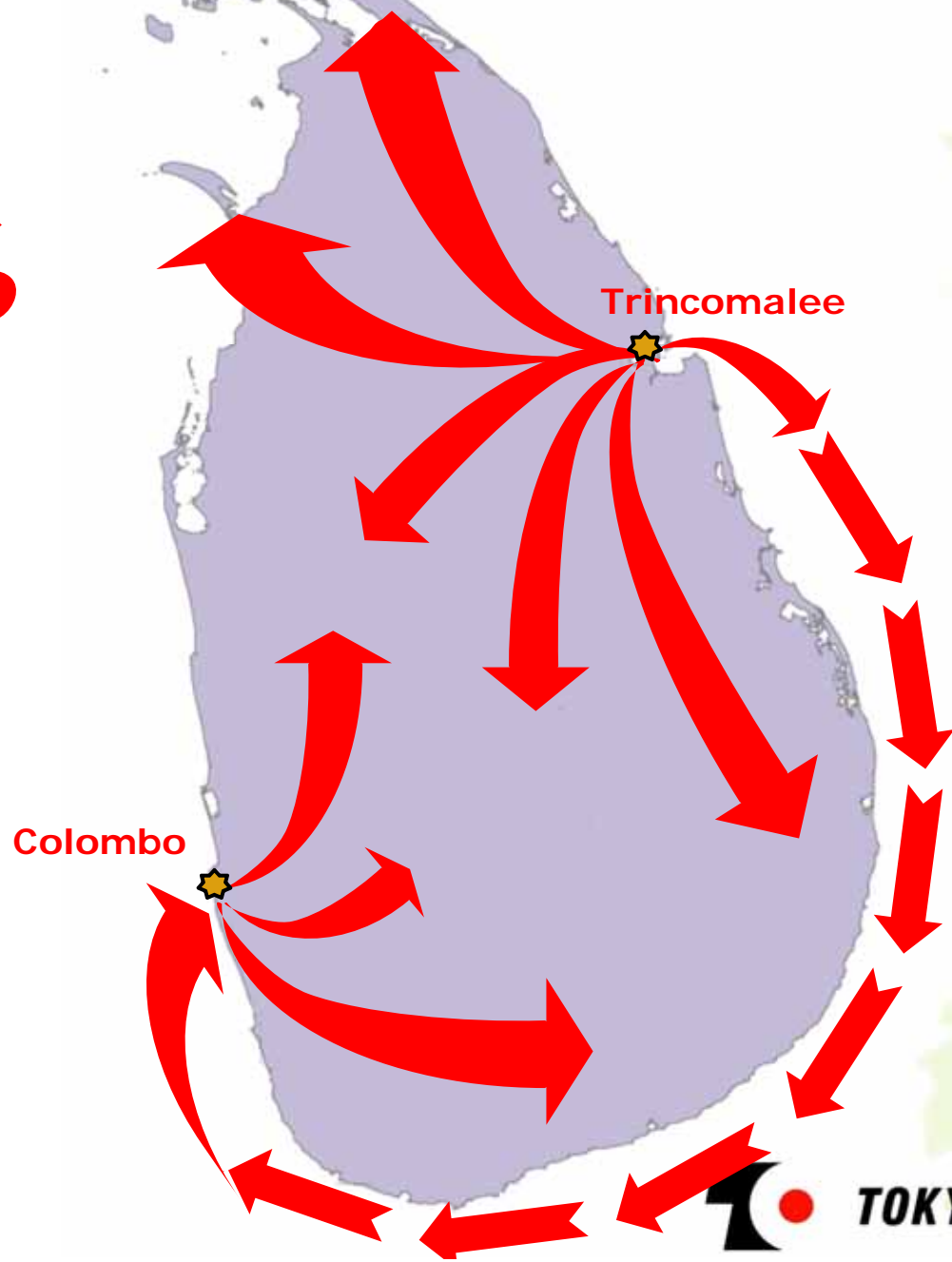
TOKYO CEMENT GROUP PLUS



TOKYO CEMENT GROUP

Market reach

65%



Market reach By Rail



Branding & Packaging to reach different customer points



Quick to Adopt New Technology

- In 2003 introduced Pre-Grinding Plant
 - Production Capacity increased by 100%
- In 2008 introduced vertical roller mill
 - Production Capacity increased by 110%
- In 2008 introduced 10MW Biomass Power Plant
 - First of its kind in Sri Lanka
- In 2014 the first Dendro power Plant in Sri Lanka
 - 5MW to National Grid

100% **Self Sufficiency** in Power

- **Sold to National Grid**

- Revenue from sale of power 2012 – Rs. 286 Million

- **Carbon Credit - Earned**

- Rs.34.4 Million in 2012 & 2013

Efficient Private Jetty

- Lower Port Tariffs
- Higher Unloading Yield



Low Freight Cost

- 2 Bulk carriers
- 1 Cement carrier



High Quality Standards



- ISO 9001
- ISO 14001
- ISO 17025

A Y S Gnanam Technical **Training** Academy



Value Added Products



Environmental **Impact**

- First Biomass Power Plant in Sri Lanka



Environmental Impact

- First Dendro based Power Plant in Sri Lanka to supply to the National Grid



Environmental **Impact**

- First Community based outsourcing of 50,000MT of Gliricidia cuttings per year



Environmental Impact

- Re-forestation and Conservation of Mangroves



Environmental **Impact**

- Reef Balls at Passikuda



Government Policy

- Free Trade Agreement
- Delay in granting approvals
- Dumping of Cement

Expansion

- Investment of US\$ 50 Million
- Developments of new Products
- Green field Projects.

THANK YOU



TOKYO CEMENT GROUP