



6th Middle East CemenTrade
5-6 October 2011
Istanbul - Turkey



Presented By

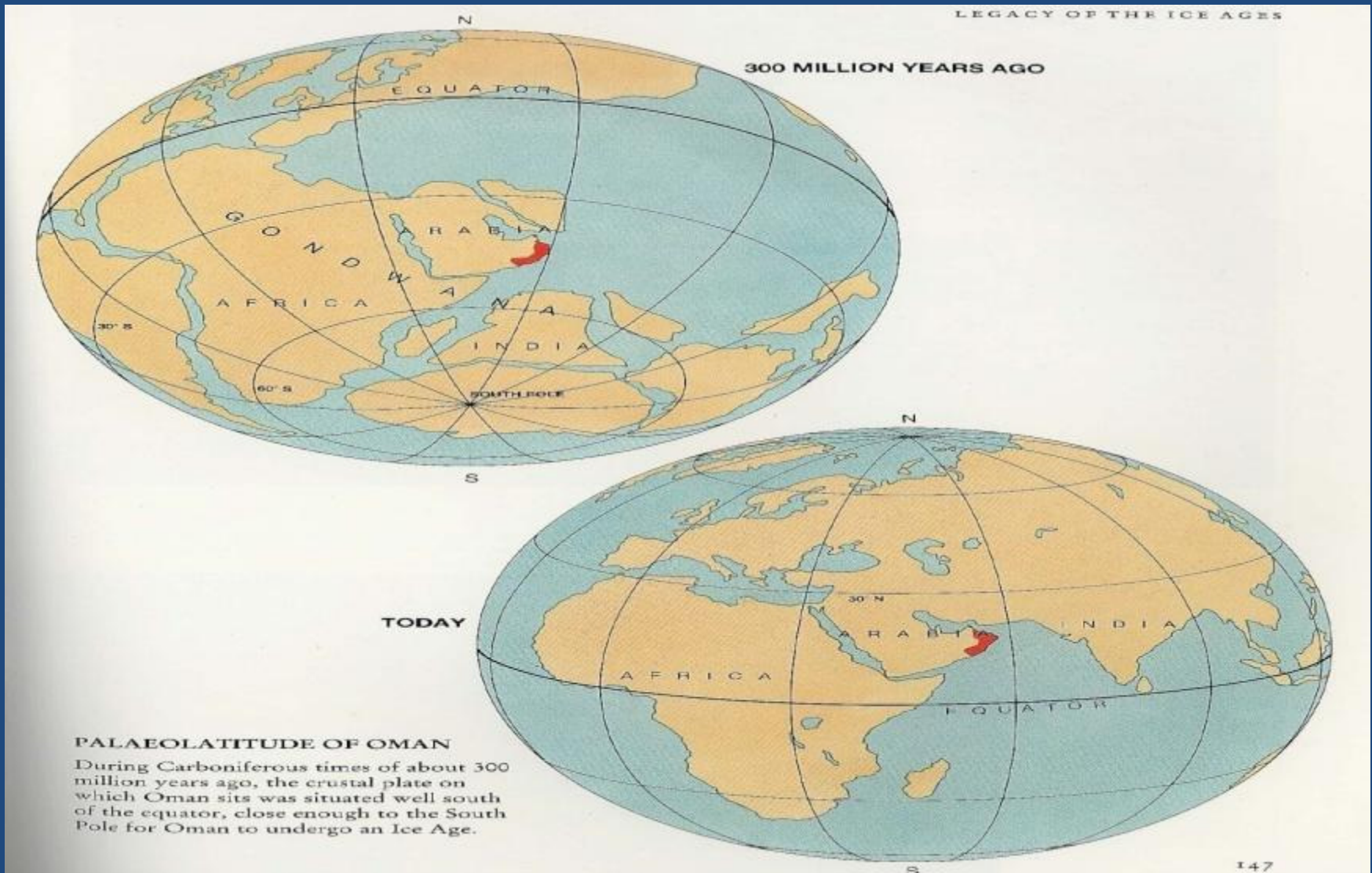
Jamal Shamis Al Hooti
Chief Executive Officer
Oman Cement Company (SAOG)

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Location, Topography ,Area, Population, Admin regions.
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The Globe



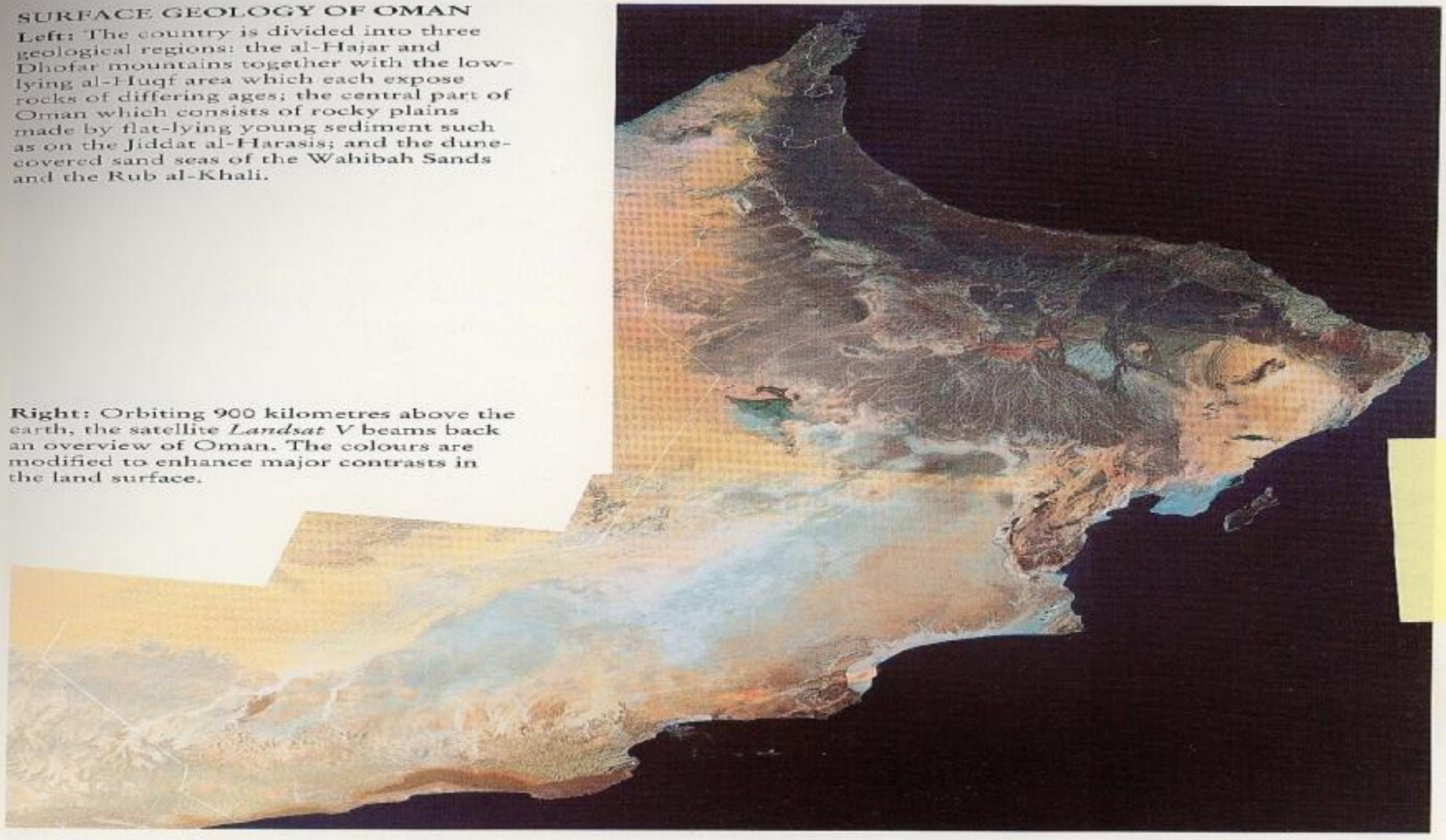
Oman land Satellite Map (Landsat V)



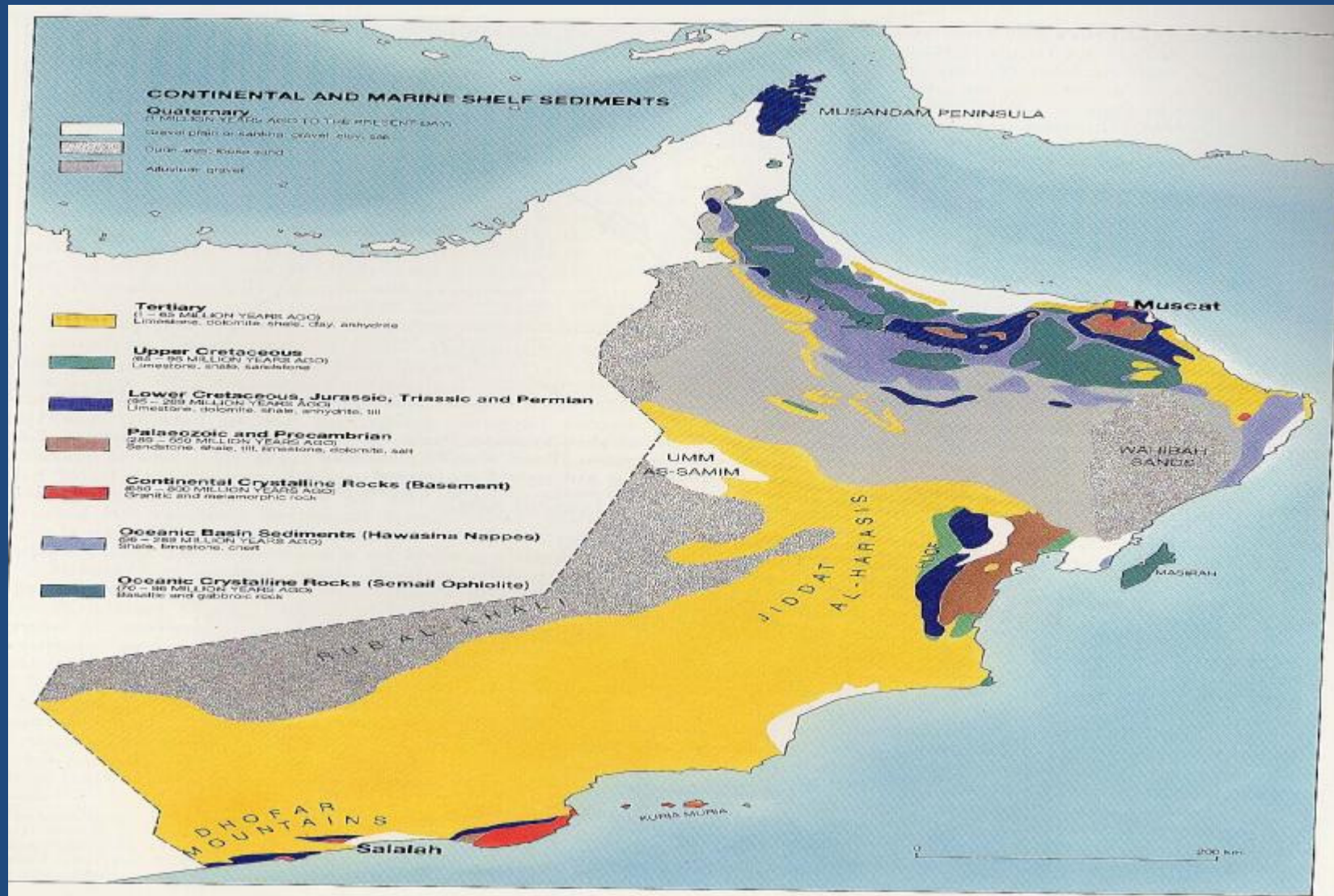
SURFACE GEOLOGY OF OMAN

Left: The country is divided into three geological regions: the al-Hajar and Dhofar mountains together with the low-lying al-Huqf area which each expose rocks of differing ages; the central part of Oman which consists of rocky plains made by flat-lying young sediment such as on the Jiddat al-Harasis; and the dune-covered sand seas of the Wahibah Sands and the Rub al-Khali.

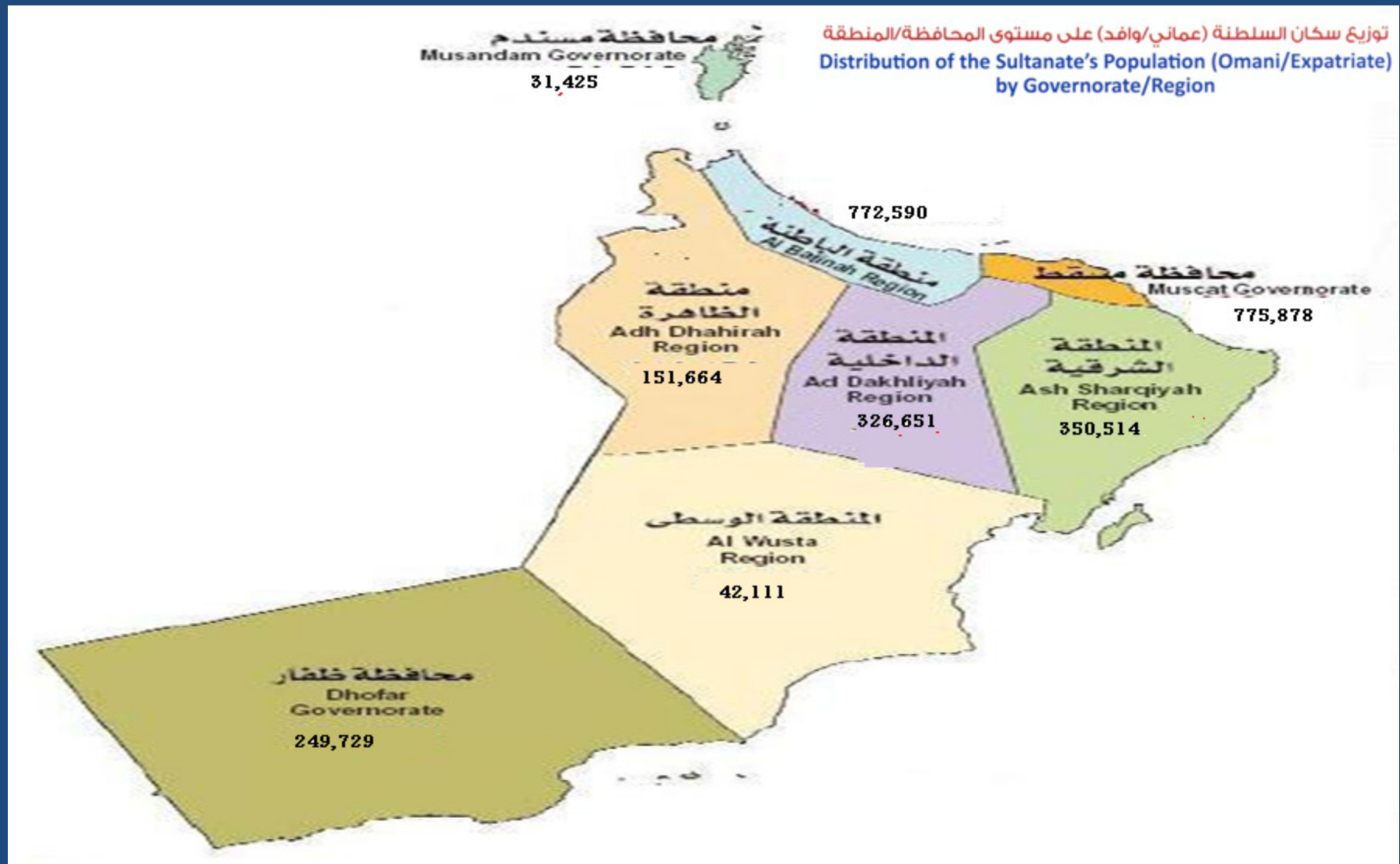
Right: Orbiting 900 kilometres above the earth, the satellite *Landsat V* beams back an overview of Oman. The colours are modified to enhance major contrasts in the land surface.



Oman Geological Map



Distribution of the Sultanate's Population (Omani/Expatriate) by Governorate/ Region





Oman Cement Company (SAOG)



Location: Muscat

Installed Capacities:

Clinker Kilns	2 X 2000 MTPD 1 X 4000 MTPD
Cement Mills	2 X 60 MTPH 1 X 70 MTPH 1 X 150 MTPH



Raysut Cement Company(SAOG)



Location: Salalah

Installed Capacities:

Clinker Kilns	1 X 650 MTPD 1 X 1500 MTPD 1 X 2000 MTPD 1 X 3000 MTPD
Cement Mills	1 X 85 MTPH 1 X 90 MTPH 1 X 150 MTPH 1 X 100 MTPH

Al Madina Cement Company LLC



Location: Al Buraimi

Installed Capacities:

Clinker Kilns	1 X 2500 MTPD
Cement Mills	2 X 70 MTPH

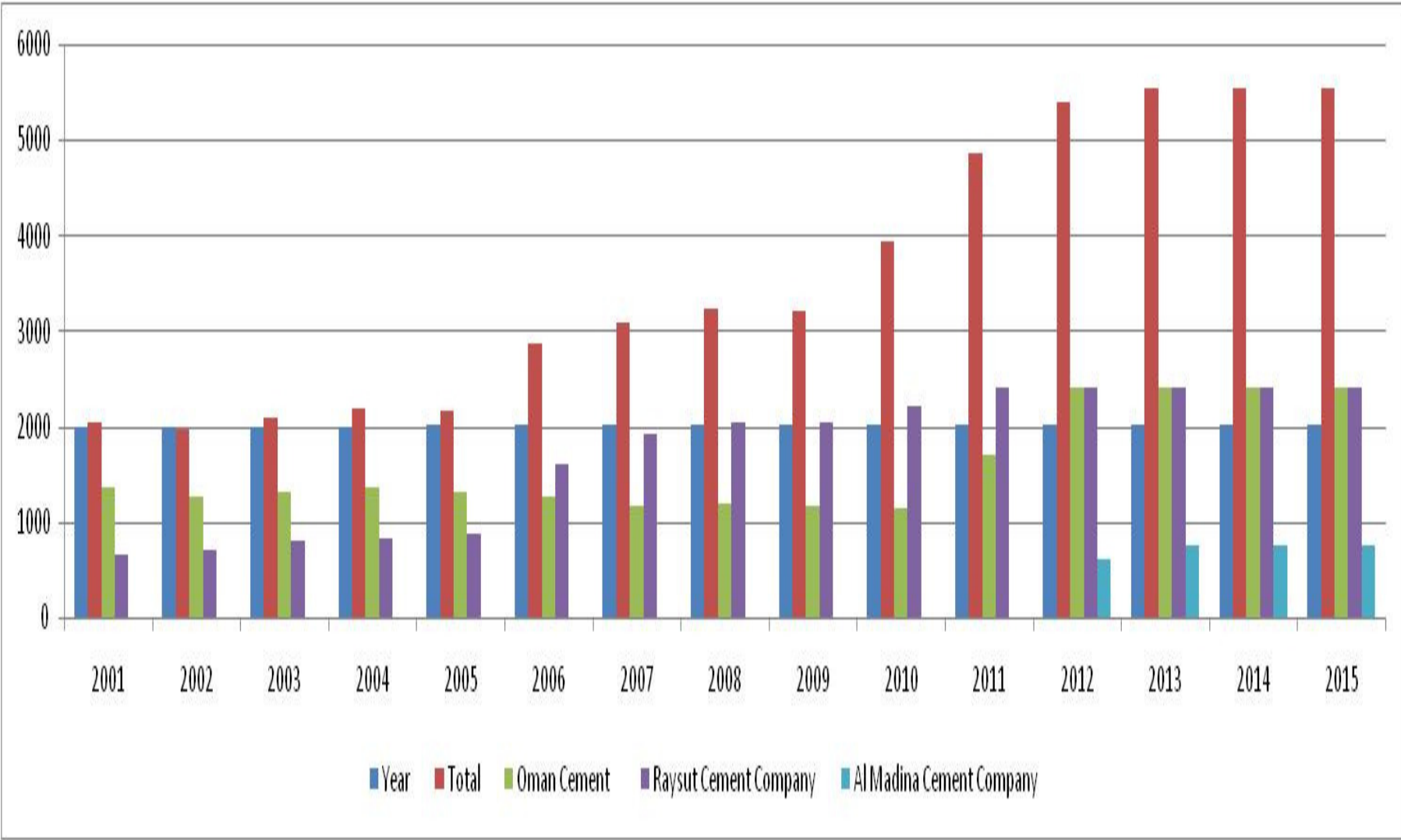
Annual Clinker Production (OMAN) (X1000)



Year	Total	Oman Cement Company	Raysut Cement Company	Al Madina Cement Company
2001	2038	1370	668	
2002	1967	1270	697	
2003	2100	1301	799	
2004	2177	1350	827	
2005	2163	1300	863	
2006	2863	1260	1603	
2007	3082	1154	1928	
2008	3227	1182	2045	
2009	3204	1161	2043	
2010	3940	1135	2205	
2011	4850	1700	2400	
2012	5400	2400	2400	600
2013	5550	2400	2400	750
2014	5550	2400	2400	750
2015	5550	2400	2400	750



Annual Clinker Production (OMAN) (X 1000)

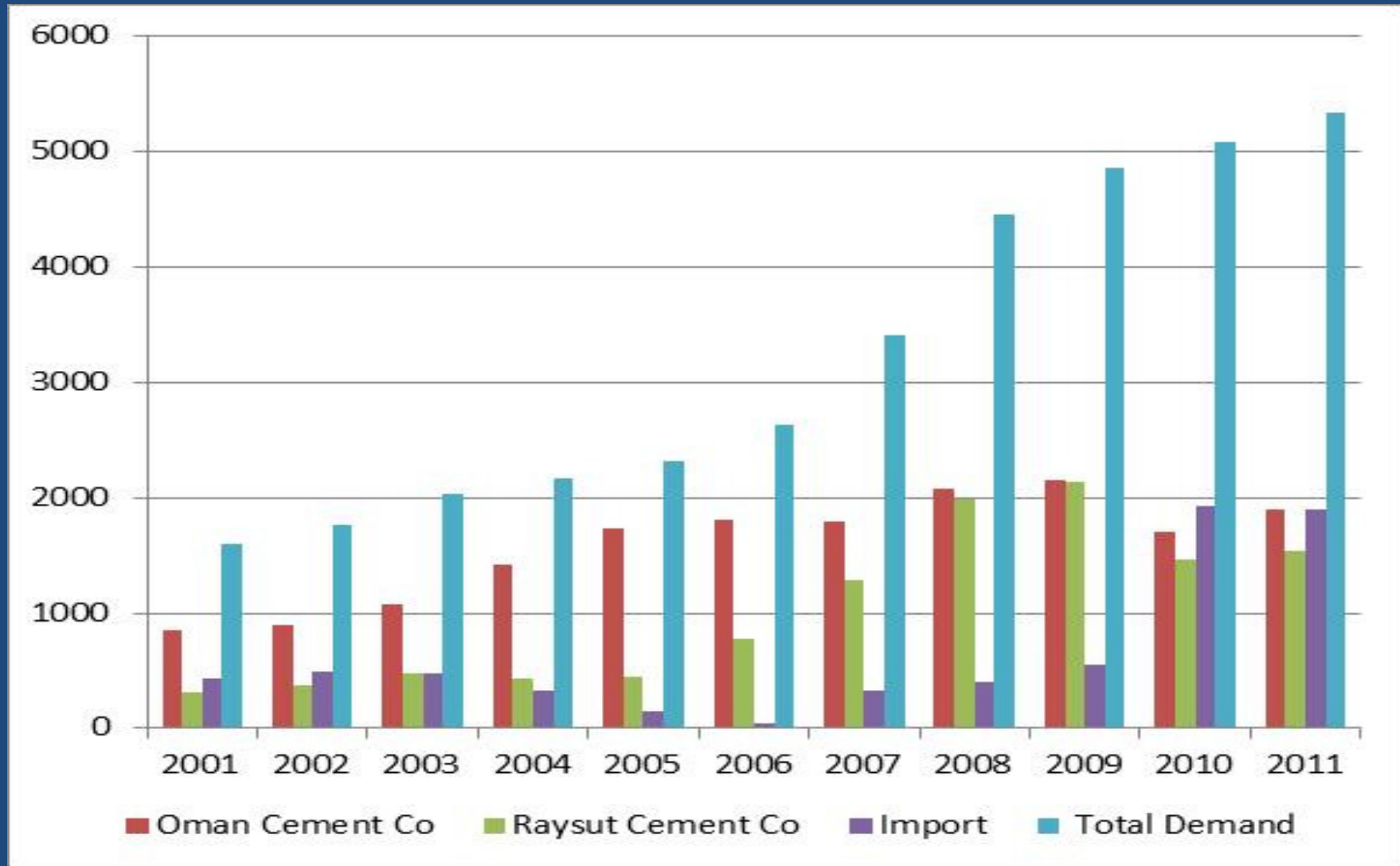




Demand & Supply (OMAN)

Year	Total Demand	Supply by (x 1000 MT)		
	(x 1000 MT)	Oman Cement Co	Raysut Cement Co	Import
2001	1596	854	313	429
2002	1758	892	377	489
2003	2036	1081	483	472
2004	2167	1417	430	323
2005	2316	1729	444	143
2006	2637	1809	777	51
2007	3400	1787	1285	328
2008	4460	2072	1988	400
2009	4853	2155	2140	558
2010	5080	1696	1460	1924
2011	5338	1900	1538	1900

Demand & Supply (OMAN)



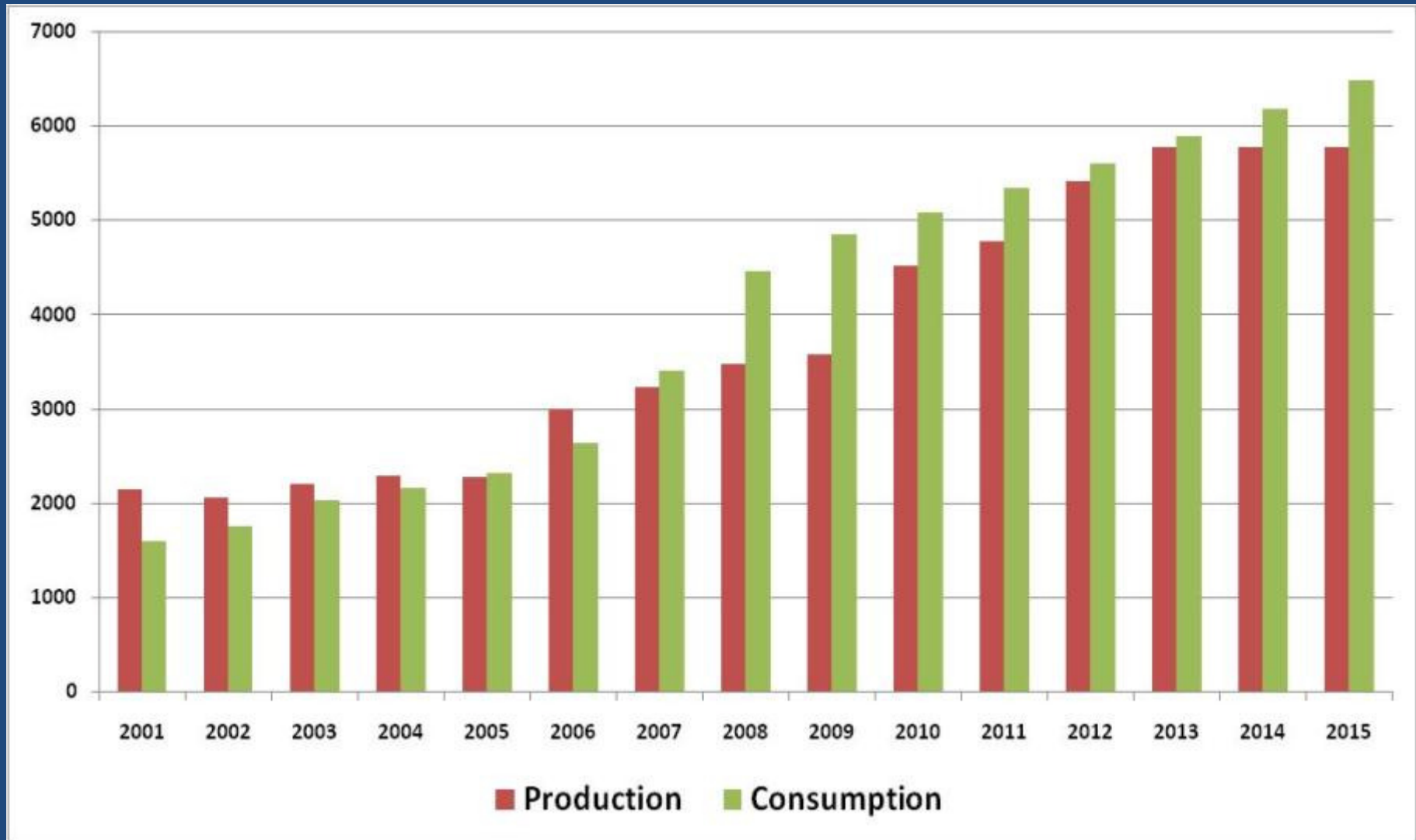


Cement Production & Consumption (OMAN)

Year	Production	Consumption	Difference
2001	2140	1596	544
2002	2065	1758	307
2003	2205	2036	169
2004	2286	2167	119
2005	2271	2316	-45
2006	3006	2637	369
2007	3236	3400	-164
2008	3478	4460	-982
2009	3581	4853	-1272
2010	4515	5080	-565
2011	4778	5338	-560
2012	5418	5605	-187
2013	5778	5885	-107
2014	5778	6179	-401
2015	5778	6488	-710

* Cement production is based on clinker designed capacity

Cement Production & Consumption (OMAN)

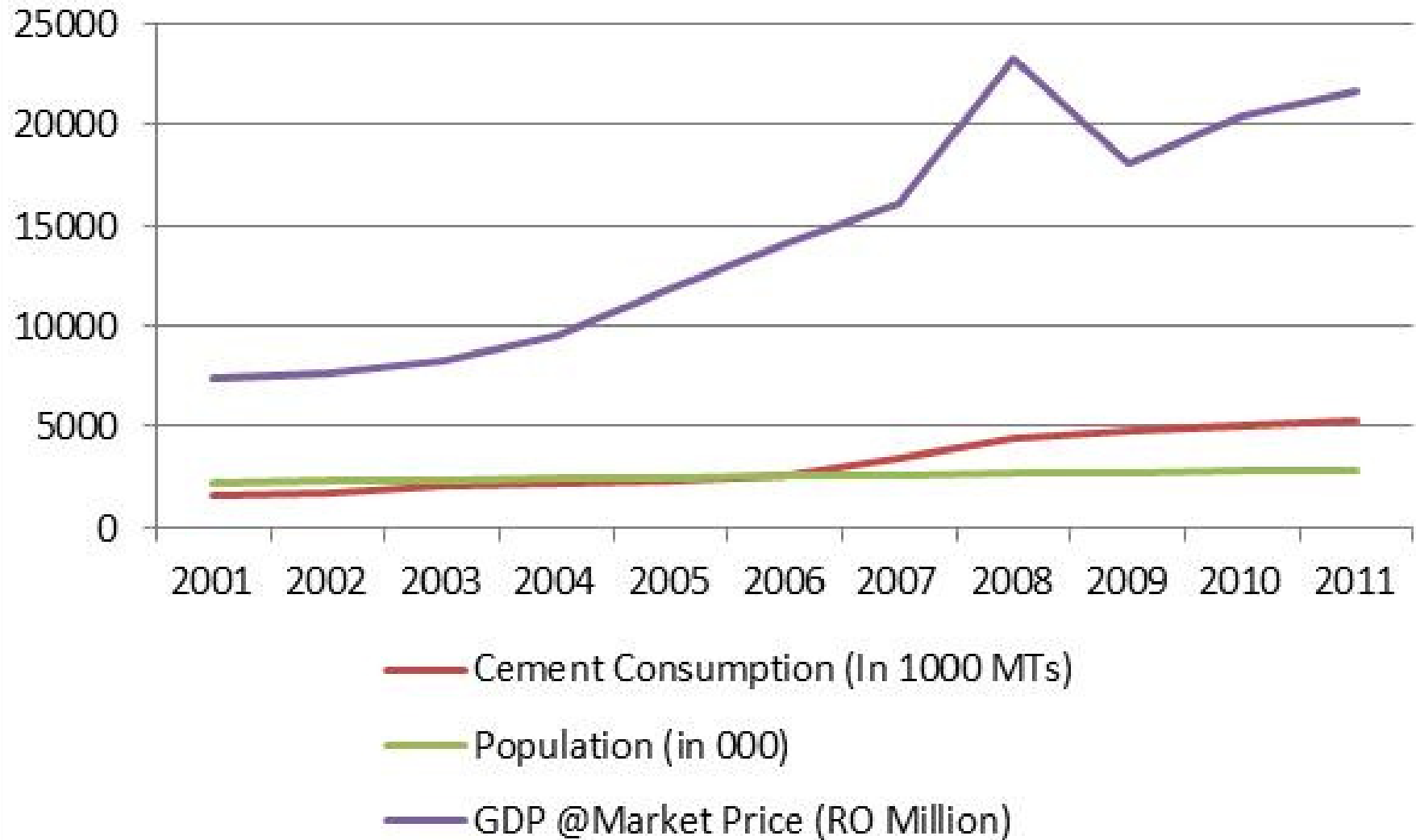




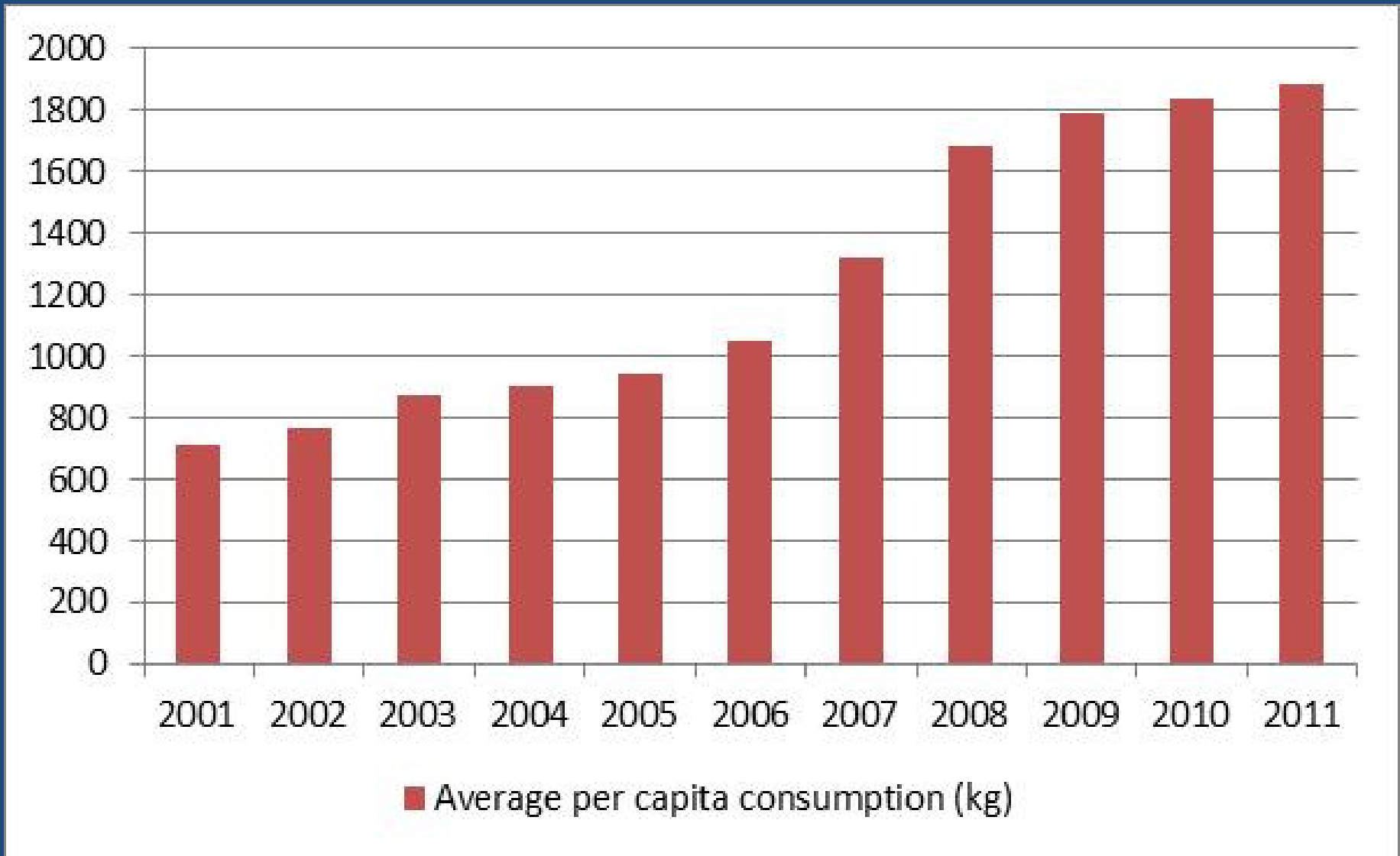
Cement Consumption Vs GDP

Year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Cement Consumption (In 1000 MTs)	1596	1758	2036	2167	2316	2637	3400	4460	4853	5080	5338
Population (in 1000)	2250	2300	2341	2400	2460	2521	2584	2649	2715	2773	2840
GDP @Market Price [RO million]	7459	7708	8283	9487	11883	14151	16111	23288	18020	20380	21603
Average per capita consumption (kg)	709	764	870	903	941	1046	1316	1684	1787	1832	1880

Cement Consumption Vs GDP



Average per capita Cement Consumption



Omani Population



Year	1993	2003	2010
Population	2018074	2340815	2773479
Relative Age Distribution of Omani Population			
Age	1993	2003	2010
<15	51.6	40.6	35.3
15-64	45.4	56.2	61.2
>65	3.0	3.2	3.5
Avg. Age	20.4	22.4	23.9

Plots: Granted & Registered



TYPE OF USE	No. of Plots Granted				No. of Plots Registered			
	Total Till End of 2009	During			Total Till End of 2009	During		
		2009	2008	2007		2009	2008	2007
Residential	459092	25905	20908	26140	352133	54796	94724	80548
Commercial	19264	325	325	2146	6352	1240	1309	2166
Commercial/ Residential	13642	313	606	1361	11430	1500	2948	3228
Residential/ Agricultural	81							
Industrial	11382	303	457	1671	6140	724	1817	1924
Agricultural	8695	3	15	30	25867	9202	7161	5387
Government *	2790	439	505	411	5447	1705	1483	1051
Govt. Residents **	4984							
Total	519930	27288	22816	31759	407369	69167	109442	94304

**Government includes: Mosque, School and other Government uses*

***Housing units that are built by the government and distributed on the social security families freely*

Govt. Revenue Estimates during the Eighth Five-Year Development Plan [2011-2015]



(RO Million)

Revenue	2011	2012	2013	2014	2015	Total	Share%
Net Oil	4956	4861	4780	4946	5337	24880	66.4
Natural Gas	920	935	957	979	979	4770	12.7
Other Current	1340	1400	1500	1600	1725	7565	20.9
Capital	48	40	34	25	24	171	
Capital Recoveries	16	14	9	35	35	109	
Total	7280	7250	7280	7585	8100	37495	100



The Preliminary Distribution of Ongoing and New Approbations in the Eighth Five-Year Development Plan at Sectoral Level (RO. Millions)

Sector	Ongoing approbations expected to be carried forward from 7 th Plan	New Approbations	Total Approbations of the Eighth Plan	Relative Share (%)
Commodity Production	97.5	161.1	258.6	2.2
Service Production	750.1	968.5	1718.6	14.3
Social Infrastructure	866.9	1051.7	1918.6	16.0
Infrastructure	4729.8	3390.3	8120.1	67.5
Total	6444.3	5571.6	12015.9	100%

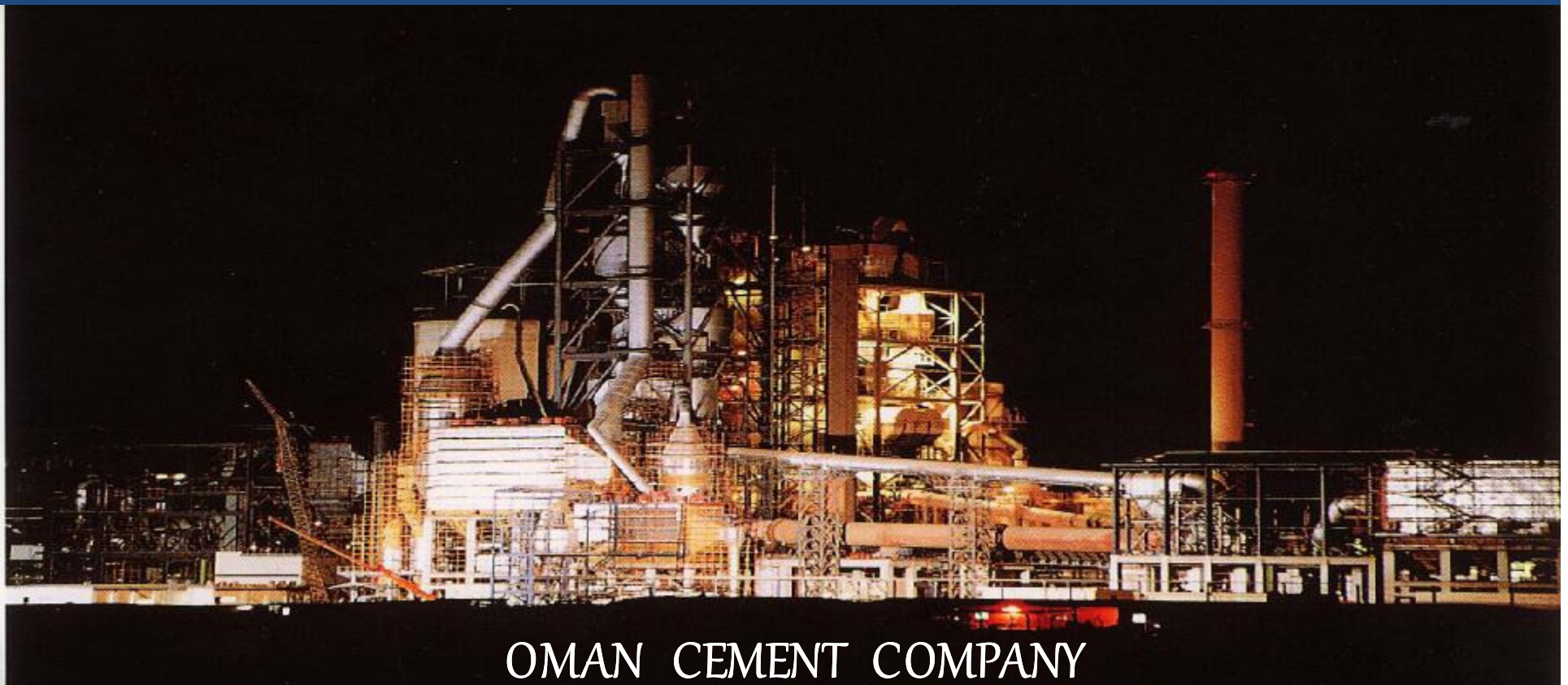
Some Mega Projects, which will fuel cement demand



Completion of Dualization of Roads	Construction of next phases of Duqum City
Completion of Sohar Port	Construction of next phases of Ras Al Hadd Resort
Completion of Sohar Airport	Construction of next phases of The Wave Project
Completion of Duqum Port	Construction of next phases of The Blue City
Completion of Duqum Airport	Construction of next phases of Taqah Beach Resort
Completion of Ras Al Hadd Airport	Construction of next phases of The Yiti Resort
Completion of Muscat Airport	Construction of next phases of Seifah Resort
Colleges, Schools & Vocational Training Institutes	The Muscat Golf & Country Club Resort
Hospitals & Polyclinics	The Southern Expressway 2 nd & 3 rd Phase
Salalah Airport	New Fisheries Ports



Laying a strong foundation for tomorrow



OMAN CEMENT COMPANY

Thank You !