

MARKET RESEARCH REPORT

Product: 252310 - Cement clinkers
(whether or not coloured)

Country: Italy

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SCOPE OF THE MARKET RESEARCH

Selected Product	Cement clinkers
Product HS Code	252310
Detailed Product Description	252310 - Cement clinkers (whether or not coloured)
Selected Country	Italy
Period Analyzed	Jan 2019 - May 2025

LIST OF SOURCES

- GTAIC calculations based on the UN Comtrade data
- GTAIC calculations based on data from the World Bank, the International Monetary Fund, the Heritage Foundation, the World Trade Organization, the UN Statistical Division, the Organization of Economic Cooperation and Development
- GTAIC calculations based upon the in-house developed methodology and data coming from all sources used in this report
- Google Gemini AI Model was used only for obtaining companies
- The Global Trade Alert (GTA)

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PRODUCT OVERVIEW

SUMMARY: PRODUCT OVERVIEW

This section provides an overview of industrial applications, end uses, and key sectors for the selected product based on the HS code classification.

P Product Description & Varieties

Cement clinker is an intermediate product in the manufacture of Portland cement, formed by heating limestone and aluminosilicate materials to high temperatures in a rotary kiln. It consists of dark grey nodules, and varieties include Ordinary Portland Cement (OPC) clinker, white cement clinker, and other special clinkers designed for specific properties.

I Industrial Applications

Primary raw material for the production of various types of cement (e.g., Portland cement, white cement, sulfate-resistant cement).

Used in cement grinding plants where it is combined with gypsum and other additives to produce finished cement products.

E End Uses

As a component in concrete for building foundations, structural elements, roads, bridges, and dams.

In mortar for masonry work, binding bricks, blocks, and stones.

In grout for filling gaps, sealing joints, and reinforcing structures.

For precast concrete products such as pipes, blocks, and panels.

S Key Sectors

- | | |
|------------------------------|--|
| • Construction Industry | • Building Materials Manufacturing |
| • Infrastructure Development | • Mining and Quarrying (for raw materials) |

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EXECUTIVE SUMMARY

SUMMARY: LONG-TERM TRENDS OF GLOBAL DEMAND FOR IMPORTS

This section provides a condensed overview of the global imports of the product over the last five calendar years. Its purpose is to facilitate the identification of whether there is an increase or decrease in global demand, the factors influencing this trend, and the primary countries-consumers of the product. A radar chart is utilized to illustrate the intensity of various parameters contributing to long-term demand trend. A higher score on this chart signifies a stronger global demand for a particular product.

Global Imports Long-term Trends, US\$-terms

Global market size for Cement clinkers was reported at US\$1.82B in 2024. The top-5 global importers of this good in 2024 include:

- Burkina Faso (9.16% share and -18.32% YoY growth rate)
- Australia (8.88% share and -33.06% YoY growth rate)
- France (7.22% share and -21.93% YoY growth rate)
- Italy (6.41% share and 30.71% YoY growth rate)
- Philippines (6.14% share and -25.14% YoY growth rate)

The long-term dynamics of the global market of Cement clinkers may be characterized as stable with US\$-terms CAGR exceeding 3.73% in 2020-2024.

Market growth in 2024 underperformed the long-term growth rates of the global market in US\$-terms.

Global Imports Long-term Trends, volumes

In volume terms, the global market of Cement clinkers may be defined as stable with CAGR in the past five calendar years of 0.76%.

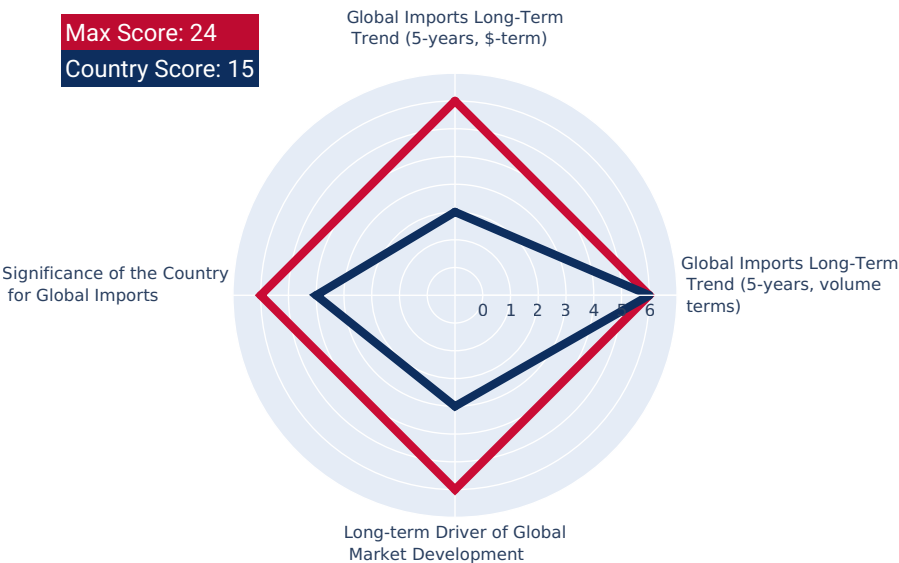
Market growth in 2024 underperformed the long-term growth rates of the global market in volume terms.

Long-term driver

One of main drivers of the global market development was stable demand and stable prices.

Significance of the Country for Global Imports

Italy accounts for about 6.41% of global imports of Cement clinkers in US\$-terms in 2024.



SUMMARY: STRENGTH OF THE DEMAND FOR IMPORTS IN THE SELECTED COUNTRY

This section provides a high-level overview of the selected country, aiming to gauge various aspects such as the country's economy size, its income level relative to other countries, recent trends in imported goods, and the extent of the global country's reliance on imports. By considering these indicators, one can evaluate the intensity of overall demand for imported goods within the country. A radar chart is employed to present multiple parameters, and the cumulative score of these parameters indicates the strength of the overall demand for imports. A higher total score on this chart reflects a greater level of overall demand strength. This total score serves as an estimate of the intensity of overall demand within the country.

Size of Economy

Italy's GDP in 2024 was 2,372.77B current US\$. It was ranked #8 globally by the size of GDP and was classified as a Largest economy.

Economy Short-term Pattern

Annual GDP growth rate in 2024 was 0.73%. The short-term growth pattern was characterized as Slowly growing economy.

The World Bank Group Country Classification by Income Level

Italy's GDP per capita in 2024 was 40,226.05 current US\$. By income level, Italy was classified by the World Bank Group as High income country.

Population Growth Pattern

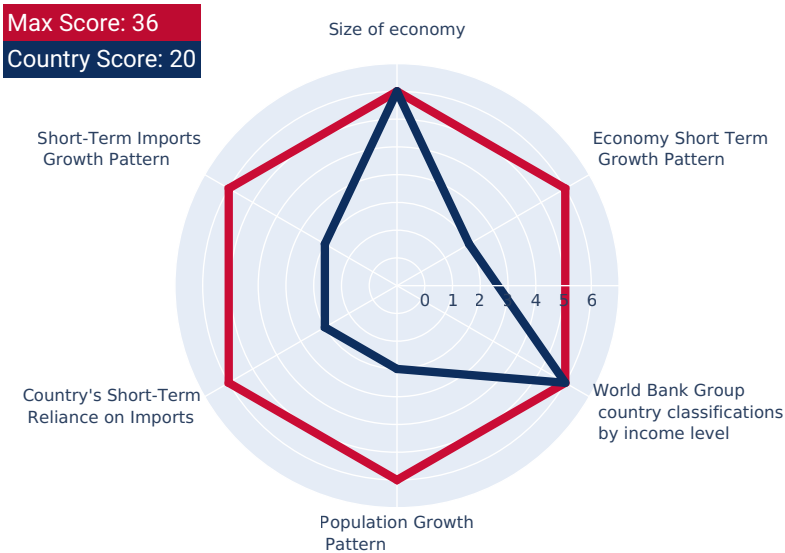
Italy's total population in 2024 was 58,986,023 people with the annual growth rate of -0.01%, which is typically observed in countries with a Population decrease pattern.

Short-term Imports Growth Pattern

Merchandise trade as a share of GDP added up to 54.35% in 2024. Total imports of goods and services was at 722.35B US\$ in 2024, with a growth rate of -0.72% compared to a year before. The short-term imports growth pattern in 2024 was backed by the moderately decreasing growth rates of this indicator.

Country's Short-term Reliance on Imports

Italy has Moderate reliance on imports in 2024.



SUMMARY: SHORT-TERM TRENDS OF COUNTRY MARKET, US\$-TERMS

This section provides the short-term forecast for imports of the selected product to the subject country. It provides information on imports in US\$ terms over the last 12 and 6 months. The radar chart in this section evaluates various parameters, and a higher cumulative score on the chart indicates a stronger tracking of imports in US dollar terms.

LTM Country Market
Trend, US\$-terms

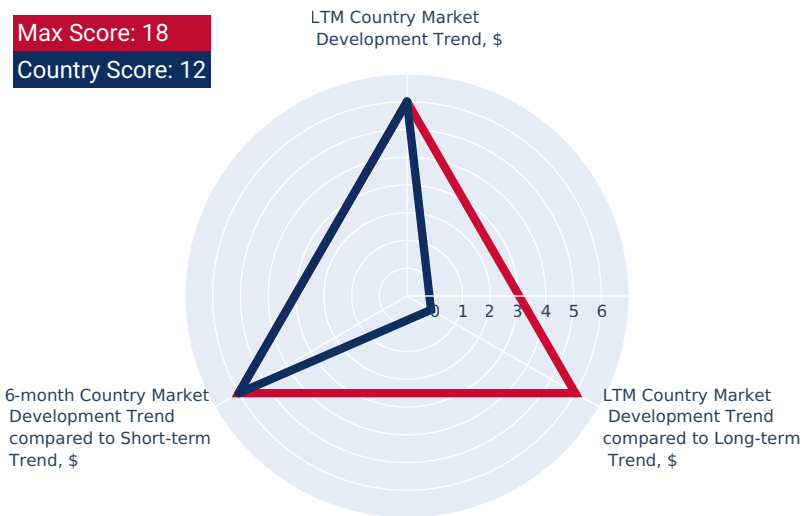
In LTM period (06.2024 - 05.2025) Italy's imports of Cement clinkers was at the total amount of US\$118.32M. The dynamics of the imports of Cement clinkers in Italy in LTM period demonstrated a fast growing trend with growth rate of 14.13%YoY. To compare, a 5-year CAGR for 2020-2024 was 32.99%. With this trend preserved, the expected monthly growth of imports in the coming period may reach the level of 1.11% (14.13% annualized).

LTM Country Market
Trend compared to
Long-term Trend,
US\$-terms

The growth of Imports of Cement clinkers to Italy in LTM underperformed the long-term market growth of this product.

6-months Country
Market Trend
compared to Short-
term Trend

Imports of Cement clinkers for the most recent 6-month period (12.2024 - 05.2025) outperformed the level of Imports for the same period a year before (1.62% YoY growth rate)



SUMMARY: SHORT-TERM TRENDS OF COUNTRY MARKET, VOLUMES AND PROXY PRICES

This section offers an insight into the short-term decomposition of imports for the chosen product. It aims to uncover the factors influencing the development of imports in US\$ terms, and identify any unusual price fluctuations observed in the last 6 to 12 months. The radar chart in this section assesses multiple parameters, and a higher cumulative score on the chart indicates a more positive short-term outlook for both demand and price within the country.

LTM Country Market
Trend, volumes

Imports of Cement clinkers to Italy in LTM period (06.2024 - 05.2025) was 1,884,650.33 tons. The dynamics of the market of Cement clinkers in Italy in LTM period demonstrated a fast growing trend with growth rate of 20.52% in comparison to the preceding LTM period. To compare, a 5-year CAGR for 2020-2024 was 27.84%.

LTM Country Market Trend
compared to Long-term
Trend, volumes

The growth of imports of Cement clinkers to Italy in LTM underperformed the long-term dynamics of the market of this product.

6-months Country Market
Trend compared to Short-
term Trend, volumes

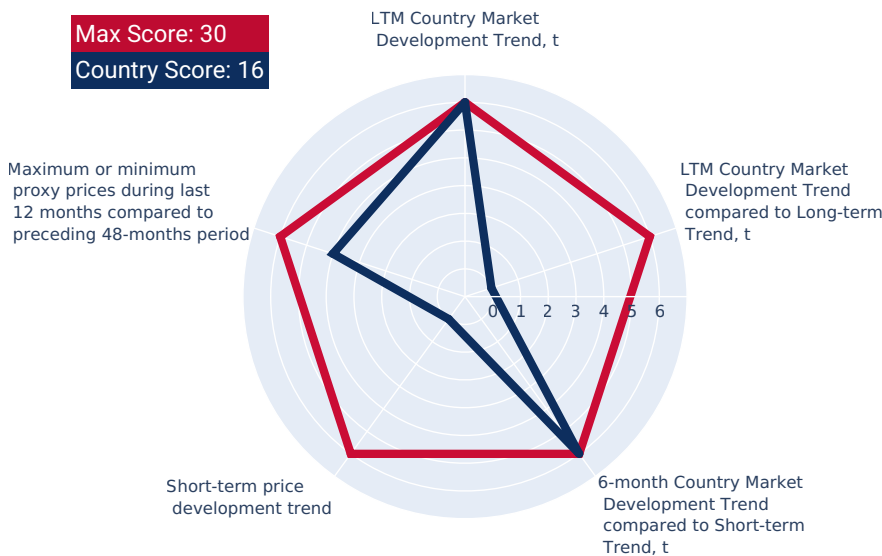
Imports in the most recent six months (12.2024 - 05.2025) surpassed the pattern of imports in the same period a year before (9.25% growth rate).

Short-term Proxy Price
Development Trend

The estimated average proxy price for imports of Cement clinkers to Italy in LTM period (06.2024 - 05.2025) was 62.78 current US\$ per 1 ton. A general trend for the change in the proxy price was stagnating.

Max or Min proxy prices
during LTM compared to
preceding 48 months

Changes in levels of monthly proxy prices of imports of Cement clinkers for the past 12 months consists of no record(s) of values higher than any of those in the preceding 48-month period, as well as no record(s) with values lower than any of those in the preceding 48-month period.



SUMMARY: ASSESSMENT OF THE CHANCES FOR SUCCESSFUL EXPORTS OF THE PRODUCT TO THE COUNTRY MARKET

This section concludes by evaluating the level of attractiveness of the country's market for suppliers. Additionally, it offers an estimate of the potential scale of sales a supplier could achieve in the mid-term, represented in both US\$ and Ktons.

Aggregated Country Rank

The aggregated country's rank was 10 out of 14. Based on this estimation, the entry potential of this product market can be defined as suggesting relatively good chances for successful market entry.

Estimation of the Market Volume that May be Captured by a New Supplier in Mid-Term

A high-level estimation of a share of imports of Cement clinkers to Italy that may be captured by a new supplier or by existing market player in the upcoming short-term period of 6-12 months, includes two major components:

- **Component 1: Potential imports volume supported by Market Growth.** This is a market volume that can be captured by supplier as an effect of the trend related to market growth. This component is estimated at 165.48K US\$ monthly.
- **Component 2: Expansion of imports due to Competitive Advantages of supplier.** This is a market volume that can be captured by supplier with strong competitive advantages, whether price wise or another, more specific and sustainable competitive advantages. This component is estimated at 363.72K US\$ monthly.

In this way, based on recent imports dynamics and high-level analysis of the competition landscape, imports of Cement clinkers to Italy may be expanded up to 529.2K US\$ monthly, which may be captured by suppliers in the short-term. This estimation holds possible should any significant competitive advantages are gained.



SUMMARY: COMPETITION

This section provides an overview of countries-suppliers, or countries-competitors, of the selected product to the chosen country. It encompasses factors such as price competitiveness, market share, and any changes of both factors.

Competitor nations in the product market in Italy

In US\$ terms, the largest supplying countries of Cement clinkers to Italy in LTM (06.2024 - 05.2025) were:

- 1. Türkiye (55.65 M US\$, or 47.03% share in total imports);
- 2. Algeria (29.27 M US\$, or 24.74% share in total imports);
- 3. Slovenia (11.26 M US\$, or 9.52% share in total imports);
- 4. Austria (6.56 M US\$, or 5.55% share in total imports);
- 5. Egypt (4.16 M US\$, or 3.52% share in total imports);

Countries who increased their imports the most (top-5 contributors to total growth in imports in US \$ terms) during the LTM period (06.2024 - 05.2025) were:

- 1. Türkiye (8.12 M US\$ contribution to growth of imports in LTM);
- 2. Austria (4.46 M US\$ contribution to growth of imports in LTM);
- 3. Tunisia (2.96 M US\$ contribution to growth of imports in LTM);
- 4. Egypt (1.99 M US\$ contribution to growth of imports in LTM);
- 5. Switzerland (1.78 M US\$ contribution to growth of imports in LTM);

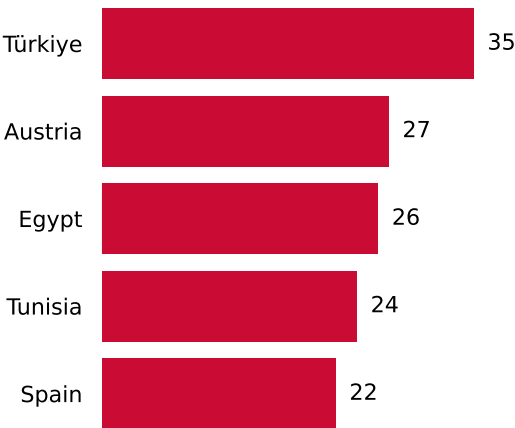
Countries whose price level of imports may have been a significant factor of the growth of supply (out of Top-10 contributors to growth of total imports):

- 1. Spain (52 US\$ per ton, 2.0% in total imports, and 174.23% growth in LTM);
- 2. Switzerland (59 US\$ per ton, 1.5% in total imports, and 0.0% growth in LTM);
- 3. Egypt (61 US\$ per ton, 3.52% in total imports, and 91.67% growth in LTM);

Top-3 high-ranked competitors in the LTM period:

- 1. Türkiye (55.65 M US\$, or 47.03% share in total imports);
- 2. Austria (6.56 M US\$, or 5.55% share in total imports);
- 3. Egypt (4.16 M US\$, or 3.52% share in total imports);

Ranking of TOP-5 Countries - Competitors



The ranking is a cumulative value of 4 parameters, with the maximum possible score of 40 points. For more information on the methodology, refer to the "Methodology" section.

SUMMARY: LIST OF COMPANIES – POTENTIAL SUPPLIERS OF THE PRODUCT FROM EACH TOP TRADE PARTNER

The following table presents a selection of companies originating from the main trade partner countries of the country analyzed. These firms are potential or actual suppliers to the market under consideration. The dataset includes company names, country of origin, official websites, and estimated size metrics with values. This information was prepared with the assistance of Google's Gemini AI model to provide additional micro-level insights, complementing structured trade data. It is intended to support market analysis and business decision-making by helping identify potential business partners or competitors within the supply chain.

Company Name	Country	Website	Size Metric	Size Value
GICA Group (Groupe Industriel des Ciments d'Algérie)	Algeria	https://www.gica.dz/	Revenue	1,750,000,000\$
LafargeHolcim Algérie (part of Holcim Group)	Algeria	https://www.lafarge.dz/	Revenue	400,000,000\$
Souakri Group (Ciments de Hadjar Soud)	Algeria	https://www.groupe-souakri.com/	Revenue	600,000,000\$
Ciments de Ain El Kebira (part of GICA Group)	Algeria	https://www.gica.dz/nos-filiales/ciments-de-ain-el-kebira/	Revenue	300,000,000\$
Ciments de Chlef (part of GICA Group)	Algeria	https://www.gica.dz/nos-filiales/ciments-de-chlef/	Revenue	250,000,000\$
Ciments de Zahana (part of GICA Group)	Algeria	https://www.gica.dz/nos-filiales/ciments-de-zahana/	Revenue	200,000,000\$
Salonit Anhovo d.d.	Slovenia	https://www.salonit.si/	Revenue	175,000,000\$
Cemex Slovenia (part of Cemex Group)	Slovenia	https://www.cemex.si/	Revenue	80,000,000\$
Lafarge Cement d.o.o. (part of Holcim Group)	Slovenia	https://www.holcim.si/	Revenue	60,000,000\$
Triglav Cement d.o.o.	Slovenia	https://www.triglavcement.si/	Revenue	30,000,000\$
Kamen d.d.	Slovenia	https://www.kamen.si/	Revenue	60,000,000\$
Gorenjska gradbena družba d.d. (GGD)	Slovenia	https://www.ggd.si/	Revenue	125,000,000\$
Oyak Cement Group	Türkiye	https://www.oyakcimento.com/	Turnover	1,500,000,000\$
Çimsa Çimento Sanayi ve Ticaret A.Ş.	Türkiye	https://www.cimsa.com.tr/	Revenue	750,000,000\$
Akçansa Çimento Sanayi ve Ticaret A.Ş.	Türkiye	https://www.akcansa.com.tr/	Revenue	600,000,000\$



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SUMMARY: LIST OF COMPANIES – POTENTIAL SUPPLIERS OF THE PRODUCT FROM EACH TOP TRADE PARTNER

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Company Name	Country	Website	Size Metric	Size Value
Limak Cement Group	Türkiye	https://www.limakcimento.com.tr/	Revenue	500,000,000\$
Medcem Global	Türkiye	https://www.medcemglobal.com/	Revenue	350,000,000\$



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SUMMARY: LIST OF COMPANIES – POTENTIAL BUYERS / IMPORTERS IN THE COUNTRY ANALYZED

The following table presents a selection of companies originating from the country analyzed, which are potential or actual buyers or importers of the product analyzed in the market under consideration. The dataset includes company names, country of origin, official websites, and estimated size metrics with values. This information was prepared with the assistance of Google's Gemini AI model to provide additional micro-level insights, complementing structured trade data. It is intended to support market analysis and business decision-making by helping identify potential business partners or competitors within the supply chain.

Company Name	Country	Website	Size Metric	Size Value
Buzzi Unicem S.p.A.	Italy	https://www.buzziunicem.com/	Revenue	4,300,000,000\$
Italcementi S.p.A. (part of HeidelbergCement Group)	Italy	https://www.italcementi.it/	Revenue	1,200,000,000\$
Cementir Italia S.p.A. (part of Cementir Holding S.p.A.)	Italy	https://www.cementiritalia.it/	Revenue	500,000,000\$
Colacem S.p.A.	Italy	https://www.colacem.it/	Revenue	600,000,000\$
Sacci S.p.A.	Italy	https://www.sacci.it/	Revenue	250,000,000\$
Holcim Italia S.p.A. (part of Holcim Group)	Italy	https://www.holcim.it/	Revenue	400,000,000\$
Gruppo Rossi S.p.A.	Italy	https://www.grupporossi.it/	Revenue	180,000,000\$
Cementeria di Costantinopoli S.p.A.	Italy	https://www.cementeriadicostantinopoli.it/	Revenue	100,000,000\$
Cementerie Aldo Barbetti S.p.A.	Italy	https://www.barbetti.it/	Revenue	90,000,000\$
Cementeria di Monselice S.p.A.	Italy	https://www.cementeriamonselice.it/	Revenue	70,000,000\$
Cementeria di Augusta S.p.A.	Italy	https://www.cementeriaaugusta.it/	Revenue	60,000,000\$
Calcestruzzi S.p.A. (part of Italcementi/ HeidelbergCement Group)	Italy	https://www.calcestruzzi.it/	Revenue	500,000,000\$
Betonrossi S.p.A.	Italy	https://www.betonrossi.it/	Revenue	150,000,000\$
Mapei S.p.A.	Italy	https://www.mapei.com/	Revenue	4,500,000,000\$
Fassa Bortolo S.p.A.	Italy	https://www.fassabortolo.com/	Revenue	1,200,000,000\$



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SUMMARY: LIST OF COMPANIES – POTENTIAL BUYERS / IMPORTERS IN THE COUNTRY ANALYZED

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Company Name	Country	Website	Size Metric	Size Value
Laterlite S.p.A.	Italy	https://www.laterlite.com/	Revenue	80,000,000\$
Kerakoll S.p.A.	Italy	https://www.kerakoll.com/	Revenue	700,000,000\$
Gruppo Cementerie Italiane S.p.A.	Italy	https://www.gruppocementerieitaliane.it/	Revenue	100,000,000\$
Betonval S.p.A.	Italy	https://www.betonval.it/	Revenue	70,000,000\$
Unical S.p.A.	Italy	https://www.unical.it/	Revenue	200,000,000\$
Cemital S.p.A.	Italy	https://www.cemital.it/	Revenue	50,000,000\$
Beton Cave S.p.A.	Italy	https://www.betoncave.it/	Revenue	40,000,000\$
Edilbeton Perugia S.p.A.	Italy	https://www.edilbetonperugia.it/	Revenue	35,000,000\$
Cava di Trezzano S.p.A.	Italy	https://www.cavaditrezzano.it/	Revenue	30,000,000\$
General Beton Triveneta S.p.A.	Italy	https://www.generalbeton.it/	Revenue	90,000,000\$



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3

GLOBAL MARKET TRENDS

GLOBAL MARKET: SUMMARY

Global Market Size (2024), in US\$ terms	US\$ 1.82 B
US\$-terms CAGR (5 previous years 2020-2024)	3.73 %
Global Market Size (2024), in tons	29,890.98 Ktons
Volume-terms CAGR (5 previous years 2020-2024)	0.76 %
Proxy prices CAGR (5 previous years 2020-2024)	2.94 %

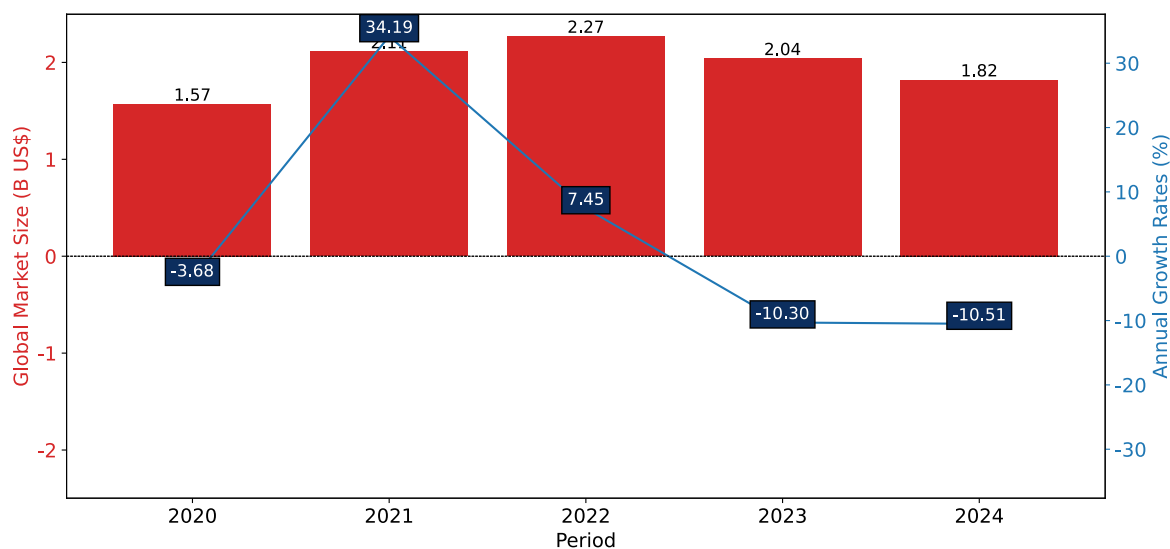
GLOBAL MARKET: LONG-TERM TRENDS

This section describes the development over the past five years, focusing on global imports of the chosen product in US\$ terms, aggregating data from all countries. It presents information in absolute values, percentage growth rates, long-term Compound Annual Growth Rate (CAGR), and delves into the economic factors contributing to global imports.

Key points:

- i. The global market size of Cement clinkers was reported at US\$1.82B in 2024.
- ii. The long-term dynamics of the global market of Cement clinkers may be characterized as stable with US\$-terms CAGR exceeding 3.73%.
- iii. One of the main drivers of the global market development was stable demand and stable prices.
- iv. Market growth in 2024 underperformed the long-term growth rates of the global market in US\$-terms.

Figure 1. Global Market Size (B US\$, left axes), Annual Growth Rates (% , right axis)



- a. The global market size of Cement clinkers was estimated to be US\$1.82B in 2024, compared to US\$2.04B the year before, with an annual growth rate of -10.51%
- b. Since the past five years CAGR exceeded 3.73%, the global market may be defined as stable.
- c. One of the main drivers of the long-term development of the global market in the US\$ terms may be defined as stable demand and stable prices.
- d. The best-performing calendar year was 2021 with the largest growth rate in the US\$-terms. One of the possible reasons was growth in demand.
- e. The worst-performing calendar year was 2024 with the smallest growth rate in the US\$-terms. One of the possible reasons was decline in demand accompanied by decline in prices.

The following countries were not included in the calculation of the size of the global market over the last six years due to irregular provision of annual import statistics to the UN Comtrade Database (Top 10 countries with irregular data provision): Ghana, Côte d'Ivoire, Cameroon, Kuwait, Uganda, Asia, not elsewhere specified, Mozambique, Oman, Nicaragua, Mauritania.

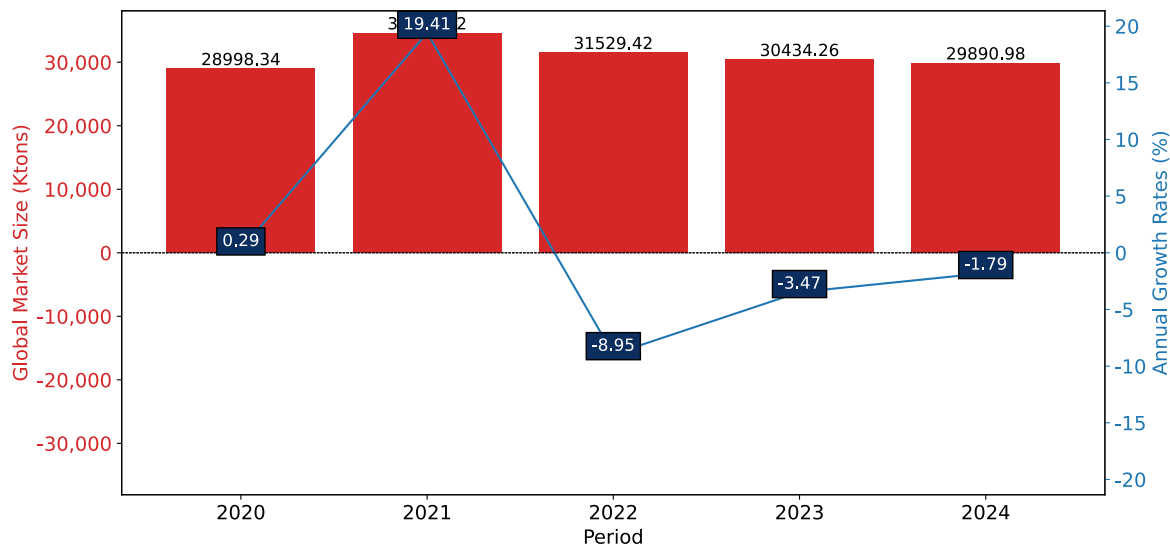
GLOBAL MARKET: LONG-TERM TRENDS

This section provides an overview of the global imports of the chosen product in volume terms, aggregating data from imports across all countries. It presents information in absolute values, percentage growth rates, and the long-term Compound Annual Growth Rate (CAGR) to supplement the analysis.

Key points:

- i. In volume terms, global market of Cement clinkers may be defined as stable with CAGR in the past five years of 0.76%.
- ii. Market growth in 2024 underperformed the long-term growth rates of the global market in volume terms.

Figure 2. Global Market Size (Ktons, left axis), Annual Growth Rates (% ,right axis)



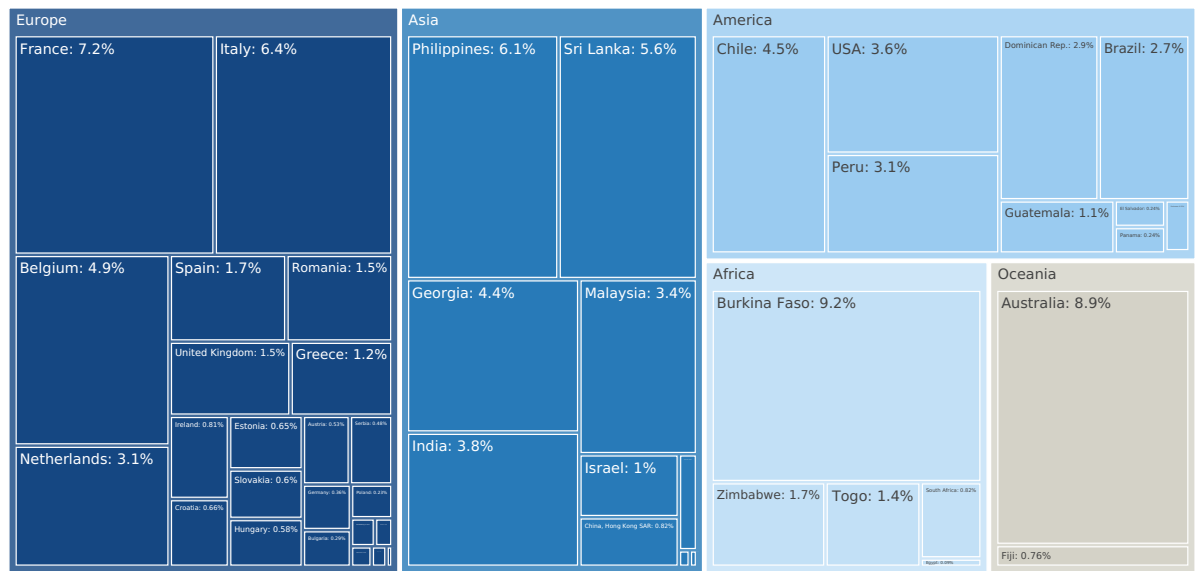
- a. Global market size for Cement clinkers reached 29,890.98 Ktons in 2024. This was approx. -1.79% change in comparison to the previous year (30,434.26 Ktons in 2023).
- b. The growth of the global market in volume terms in 2024 underperformed the long-term global market growth of the selected product.

The following countries were not included in the calculation of the size of the global market over the last six years due to irregular provision of annual import statistics to the UN Comtrade Database (Top 10 countries with irregular data provision): Ghana, Côte d'Ivoire, Cameroon, Kuwait, Uganda, Asia, not elsewhere specified, Mozambique, Oman, Nicaragua, Mauritania.

MARKETS CONTRIBUTING TO GLOBAL DEMAND

This section describes the global structure of imports for the chosen product. It utilizes a tree-map diagram, which offers a user-friendly visual representation covering all major importers.

Figure 3. Country-specific Global Imports in 2024, US\$-terms



Top-5 global importers of Cement clinkers in 2024 include:

- 1. Burkina Faso (9.16% share and -18.32% YoY growth rate of imports);
- 2. Australia (8.88% share and -33.06% YoY growth rate of imports);
- 3. France (7.22% share and -21.93% YoY growth rate of imports);
- 4. Italy (6.41% share and 30.71% YoY growth rate of imports);
- 5. Philippines (6.14% share and -25.14% YoY growth rate of imports).

Italy accounts for about 6.41% of global imports of Cement clinkers.

4

COUNTRY **ECONOMIC** **OUTLOOK**

COUNTRY ECONOMIC OUTLOOK - 1

This section provides a list of macroeconomic indicators related to the chosen country . It may be important for exporters while looking for an opportunity to sell to this country. Find information and data trends about the country's economy, including the GDP growth, change in income, change in exports/imports, price inflation prospects. Besides, the section includes indicators of macroeconomic risks, stability of local currency, ability of the country to repay debts.

GDP (current US\$) (2024), B US\$	2,372.77
Rank of the Country in the World by the size of GDP (current US\$) (2024)	8
Size of the Economy	Largest economy
Annual GDP growth rate, % (2024)	0.73
Economy Short-Term Growth Pattern	Slowly growing economy
GDP per capita (current US\$) (2024)	40,226.05
World Bank Group country classifications by income level	High income
Inflation, (CPI, annual %) (2024)	0.98
Short-Term Inflation Profile	Low level of inflation
Long-Term Inflation Index, (CPI, 2010=100), % (2024)	129.88
Long-Term Inflation Environment	Very low inflationary environment
Short-Term Monetary Policy (2024)	Tightening monetary environment
Population, Total (2024)	58,986,023
Population Growth Rate (2024), % annual	-0.01
Population Growth Pattern	Population decrease

COUNTRY ECONOMIC OUTLOOK - 2

This section provides a list of macroeconomic indicators related to the chosen country. This may be important for exporters while looking for an opportunity to sell to this country. Find information and data trends about the country's economy, including the GDP growth, change in income, change in exports/imports operations, price inflation prospects. Besides, the section includes indicators of macroeconomic risks, stability of local currency, ability to repay debts.

GDP (current US\$) (2024), B US\$	2,372.77
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Population Growth Rate (2024), % annual	-0.01
Population Growth Pattern	Population decrease

COUNTRY ECONOMIC OUTLOOK - COMPETITION

This section provides an overview of the competitive environment and trade protection measures within the selected country. It includes detailed information on import tariffs, pricing levels for specific goods, and the competitive advantages held by local producers.

A competitive landscape of Cement clinkers formed by local producers in Italy in 2022 is likely to be risk intense with an elevated level of local competition. The potentiality of local businesses to produce similar competitive products is somewhat Promising. However, this doesn't account for the competition coming from other suppliers of this product to the market of Italy.

In accordance with international classifications, the Cement clinkers belongs to the product category, which also contains another 34 products, which Italy has comparative advantage in producing. This note, however, needs further research before setting up export business to Italy, since it also doesn't account for competition coming from other suppliers of the same products to the market of Italy.

The level of proxy prices of 75% of imports of Cement clinkers to Italy is within the range of 52.07 - 580.22 US\$/ton in 2024. The median value of proxy prices of imports of this commodity (current US\$/ton 70.85), however, is somewhat equal to the median value of proxy prices of 75% of the global imports of the same commodity in this period (current US\$/ton 71.48). This may signal that the product market in Italy in terms of its profitability may have not become distinct for suppliers if compared to the international level.

Italy charged on imports of Cement clinkers in n/a on average n/a%. The bound rate of ad valorem duty on this product, Italy agreed not to exceed, is n/a%. Once a rate of duty is bound, it may not be raised without compensating the affected parties. At the same time, the rate of the tariff Italy set for Cement clinkers was n/a the world average for this product in n/a n/a. This may signal about Italy's market of this product being n/a protected from foreign competition.

This ad valorem duty rate Italy set for Cement clinkers has been agreed to be a normal non-discriminatory tariff charged on imports of this product for all WTO member states. However, a country may apply the preferential rates resulting from a reciprocal trading agreement (e.g. free trade agreement or regional trading agreement) or a non-reciprocal preferential trading scheme like the Generalized System of Preference or preferential tariffs for least developed countries. As of 2024, Italy applied the preferential rates for 0 countries on imports of Cement clinkers.

5

COUNTRY **MARKET** **TRENDS**

PRODUCT MARKET SNAPSHOT

This section provides data on imports of a specific good to a chosen country.

Country Market Size (2024), US\$	US\$ 116.76 M
Contribution of Cement clinkers to the Total Imports Growth in the previous 5 years	US\$ 79.43 M
Share of Cement clinkers in Total Imports (in value terms) in 2024.	0.02%
Change of the Share of Cement clinkers in Total Imports in 5 years	116.72%
Country Market Size (2024), in tons	1,815.04 Ktons
CAGR (5 previous years 2020-2024), US\$-terms	32.99%
CAGR (5 previous years 2020-2024), volume terms	27.84%
Proxy price CAGR (5 previous years 2020-2024)	4.03%

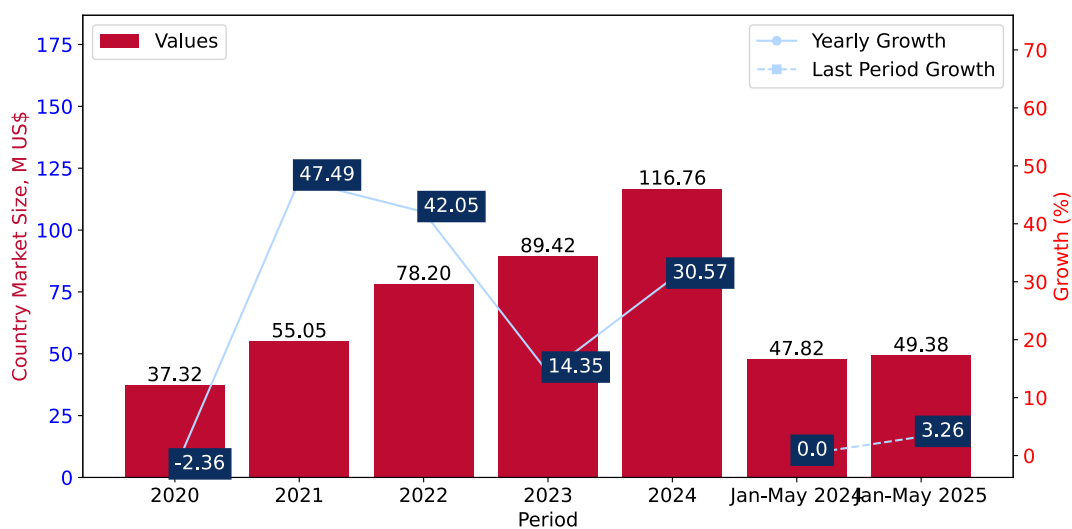
LONG-TERM COUNTRY TRENDS: IMPORTS VALUES

This section provides information on the imports of a specific product to a designated country over the past five years, presented in US\$ terms. It encompasses the growth rates of imports, the development of long-term import patterns, factors influencing import fluctuations, and an estimation of the country's reliance on imports.

Key points:

- i. Long-term performance of Italy's market of Cement clinkers may be defined as fast-growing.
- ii. Growth in demand may be a leading driver of the long-term growth of Italy's market in US\$-terms.
- iii. Expansion rates of imports of the product in 01.2025-05.2025 underperformed the level of growth of total imports of Italy.
- iv. The strength of the effect of imports of the product on the country's economy is generally low.

Figure 4. Italy's Market Size of Cement clinkers in M US\$ (left axis) and Annual Growth Rates in % (right axis)



- a. Italy's market size reached US\$116.76M in 2024, compared to US\$89.42M in 2023. Annual growth rate was 30.57%.
- b. Italy's market size in 01.2025-05.2025 reached US\$49.38M, compared to US\$47.82M in the same period last year. The growth rate was 3.26%.
- c. Imports of the product contributed around 0.02% to the total imports of Italy in 2024. That is, its effect on Italy's economy is generally of a low strength. At the same time, the share of the product imports in the total Imports of Italy remained stable.
- d. Since CAGR of imports of the product in US\$-terms for the past 5Y exceeded 32.99%, the product market may be defined as fast-growing. Ultimately, the expansion rate of imports of Cement clinkers was outperforming compared to the level of growth of total imports of Italy (9.61% of the change in CAGR of total imports of Italy).
- e. It is highly likely, that growth in demand was a leading driver of the long-term growth of Italy's market in US\$-terms.
- f. The best-performing calendar year with the highest growth rate of imports in the US\$-terms was 2021. It is highly likely that growth in demand had a major effect.
- g. The worst-performing calendar year with the smallest growth rate of imports in the US\$-terms was 2020. It is highly likely that declining average prices had a major effect.

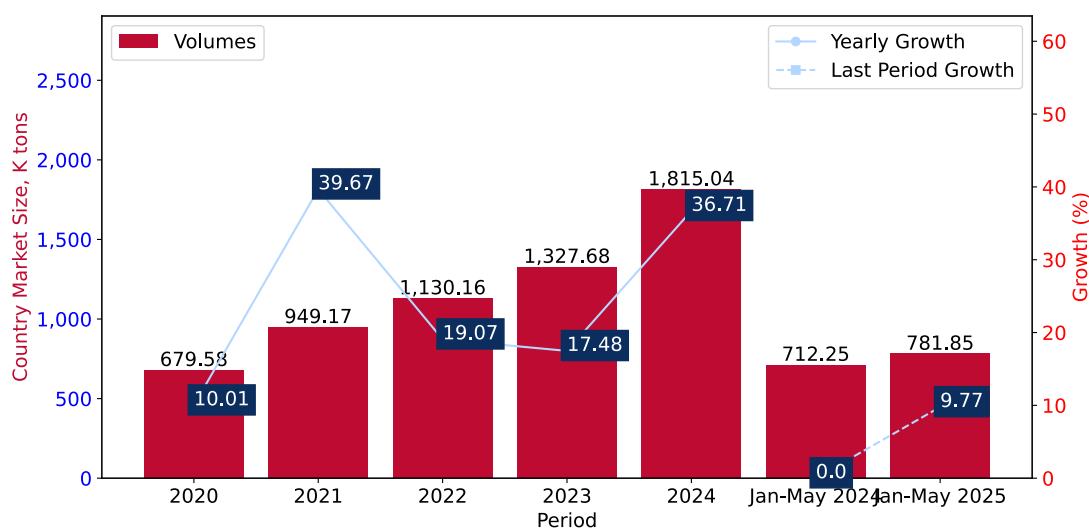
LONG-TERM COUNTRY TRENDS: IMPORTS VOLUMES

This section presents information regarding the imports of a particular product to a selected country over the last five years. It includes details about physical volumes, import growth rates, and the long-term development trend in imports.

Key points:

- i. In volume terms, the market of Cement clinkers in Italy was in a fast-growing trend with CAGR of 27.84% for the past 5 years, and it reached 1,815.04 Ktons in 2024.
- ii. Expansion rates of the imports of Cement clinkers in Italy in 01.2025-05.2025 underperformed the long-term level of growth of the Italy's imports of this product in volume terms

Figure 5. Italy's Market Size of Cement clinkers in K tons (left axis), Growth Rates in % (right axis)



- a. Italy's market size of Cement clinkers reached 1,815.04 Ktons in 2024 in comparison to 1,327.68 Ktons in 2023. The annual growth rate was 36.71%.
- b. Italy's market size of Cement clinkers in 01.2025-05.2025 reached 781.85 Ktons, in comparison to 712.25 Ktons in the same period last year. The growth rate equaled to approx. 9.77%.
- c. Expansion rates of the imports of Cement clinkers in Italy in 01.2025-05.2025 underperformed the long-term level of growth of the country's imports of Cement clinkers in volume terms.

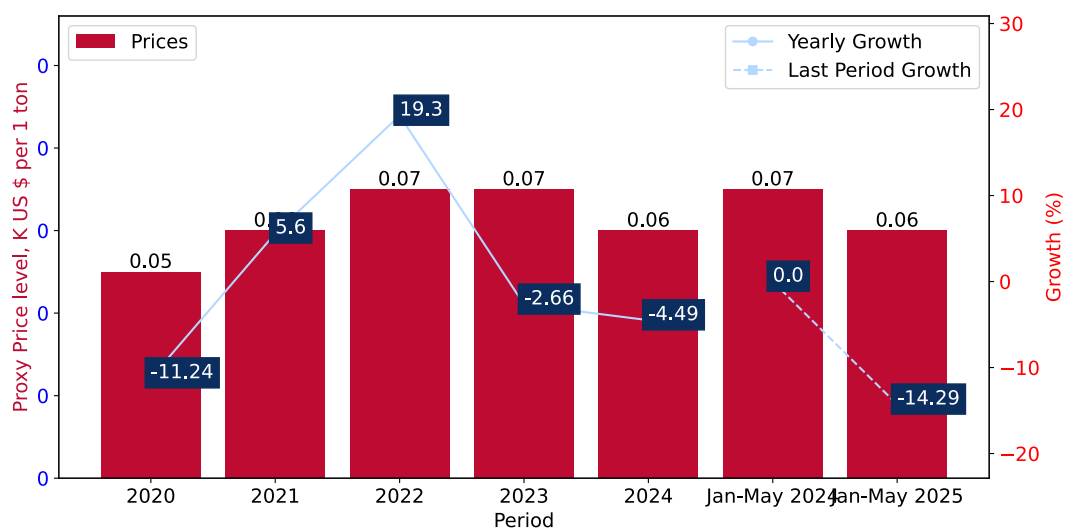
LONG-TERM COUNTRY TRENDS: PROXY PRICES

This section provides details regarding the price fluctuations of a specific imported product over the past five years. It covers the assessment of average annual proxy prices, their changes, growth rates, and identification of any anomalies in price fluctuations.

Key points:

- i. Average annual level of proxy prices of Cement clinkers in Italy was in a growing trend with CAGR of 4.03% for the past 5 years.
- ii. Expansion rates of average level of proxy prices on imports of Cement clinkers in Italy in 01.2025-05.2025 underperformed the long-term level of proxy price growth.

Figure 6. Italy's Proxy Price Level on Imports, K US\$ per 1 ton (left axis), Growth Rates in % (right axis)

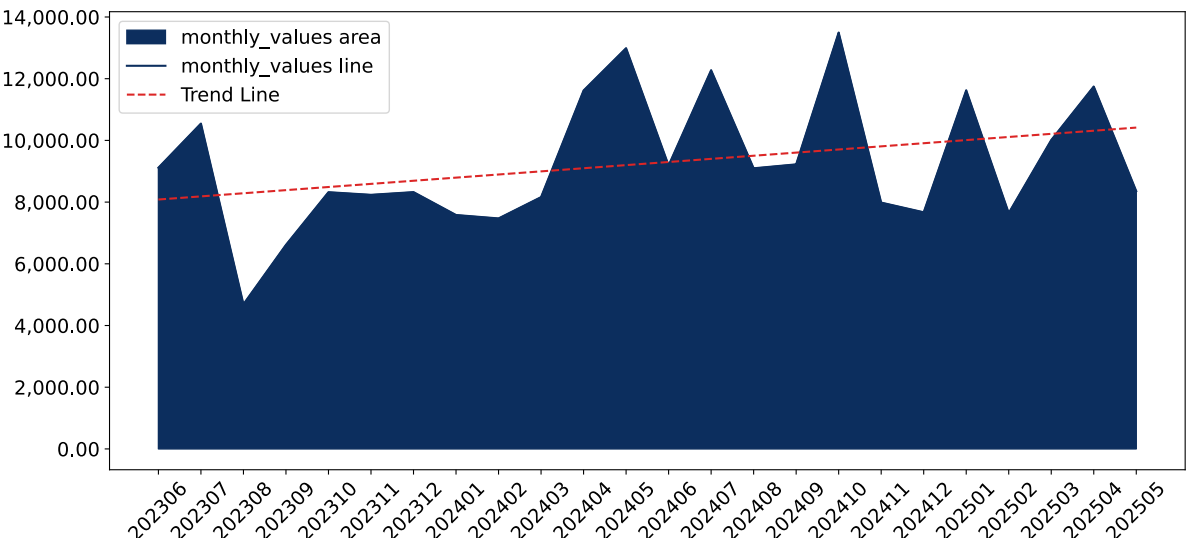


1. Average annual level of proxy prices of Cement clinkers has been growing at a CAGR of 4.03% in the previous 5 years.
2. In 2024, the average level of proxy prices on imports of Cement clinkers in Italy reached 0.06 K US\$ per 1 ton in comparison to 0.07 K US\$ per 1 ton in 2023. The annual growth rate was -4.49%.
3. Further, the average level of proxy prices on imports of Cement clinkers in Italy in 01.2025-05.2025 reached 0.06 K US\$ per 1 ton, in comparison to 0.07 K US\$ per 1 ton in the same period last year. The growth rate was approx. -14.29%.
4. In this way, the growth of average level of proxy prices on imports of Cement clinkers in Italy in 01.2025-05.2025 was lower compared to the long-term dynamics of proxy prices.

SHORT-TERM TRENDS: IMPORTS VALUES

This section offers comprehensive and up-to-date statistics concerning the imports of a specific product into a designated country over the past 24 months for which relevant statistics is published and available. It includes monthly import values in US\$, year-on-year changes, identification of any anomalies in imports, examination of factors driving short-term fluctuations. Besides, it provides a quantitative estimation of the short-term trend in imports to supplement the data.

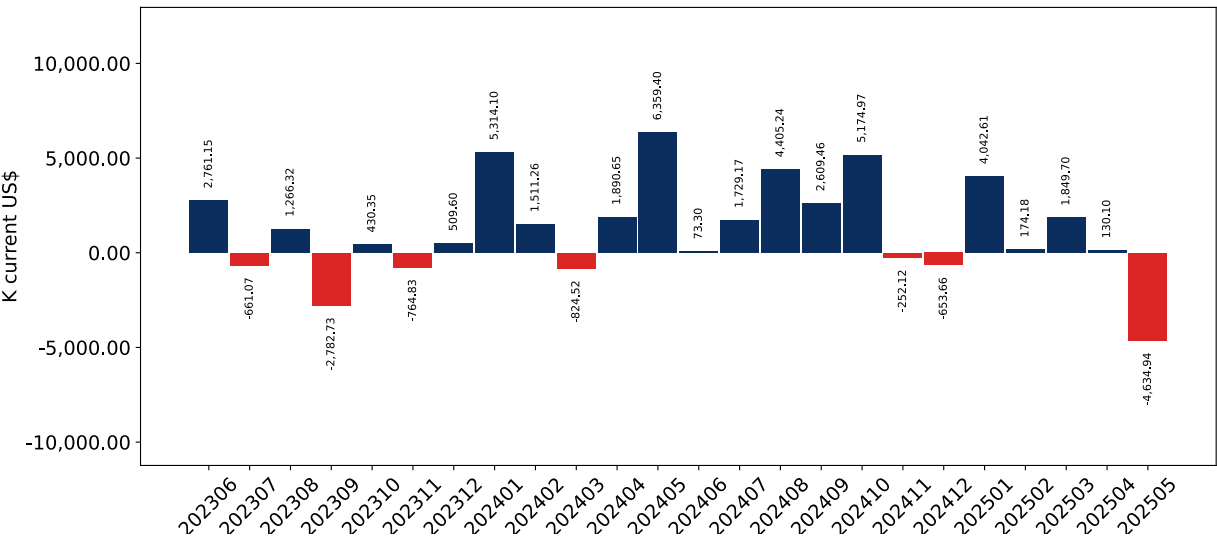
Figure 7. Monthly Imports of Italy, K current US\$ 1.11% 14.13%
monthly annualized



Average monthly growth rates of Italy's imports were at a rate of 1.11%, the annualized expected growth rate can be estimated at 14.13%.

The dashed line is a linear trend for Imports. Values are not seasonally adjusted.

Figure 8. Y-o-Y Monthly Level Change of Imports of Italy, K current US\$ (left axis)



Year-over-year monthly imports change depicts fluctuations of imports operations in Italy. The more positive values are on chart, the more vigorous the country in importing of Cement clinkers. Negative values may be a signal of the market contraction.

Values in columns are not seasonally adjusted.

SHORT-TERM TRENDS: IMPORTS VALUES

This section presents detailed and the most recent data on the imports of a specific commodity to a chosen country over the past 24 months for which relevant statistics is published and available. It encompasses monthly import figures in US dollars, year-on-year changes, anomalies in import patterns, factors driving short-term fluctuations, and includes a quantitative estimation of short-term import trends as additional information.

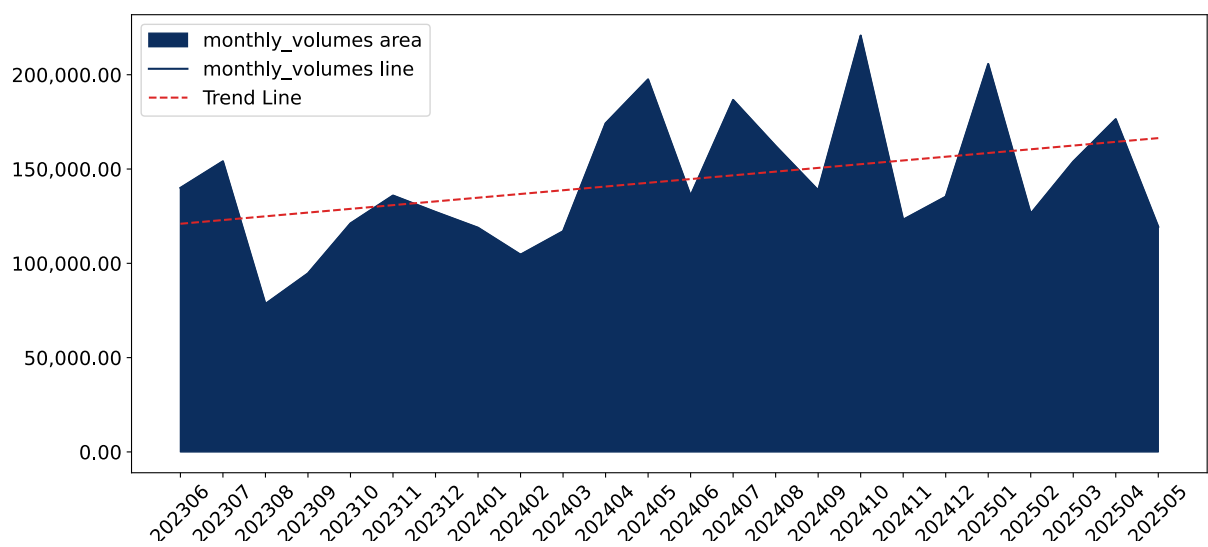
Key points:

- i. The dynamics of the market of Cement clinkers in Italy in LTM (06.2024 - 05.2025) period demonstrated a fast growing trend with growth rate of 14.13%. To compare, a 5-year CAGR for 2020-2024 was 32.99%.
 - ii. With this trend preserved, the expected monthly growth of imports in the coming period may reach the level of 1.11%, or 14.13% on annual basis.
 - iii. Data for monthly imports over the last 12 months contain 1 record(s) of higher and no record(s) of lower values compared to any value for the 48-months period before.
-
- a. In LTM period (06.2024 - 05.2025) Italy imported Cement clinkers at the total amount of US\$118.32M. This is 14.13% growth compared to the corresponding period a year before.
 - b. The growth of imports of Cement clinkers to Italy in LTM underperformed the long-term imports growth of this product.
 - c. Imports of Cement clinkers to Italy for the most recent 6-month period (12.2024 - 05.2025) outperformed the level of Imports for the same period a year before (1.62% change).
 - d. A general trend for market dynamics in 06.2024 - 05.2025 is fast growing. The expected average monthly growth rate of imports of Italy in current USD is 1.11% (or 14.13% on annual basis).
 - e. Monthly dynamics of imports in last 12 months included 1 record(s) that exceeded the highest/peak value of imports achieved in the preceding 48 months, and no record(s) that bypass the lowest value of imports in the same period in the past.

SHORT-TERM TRENDS: IMPORTS VOLUMES

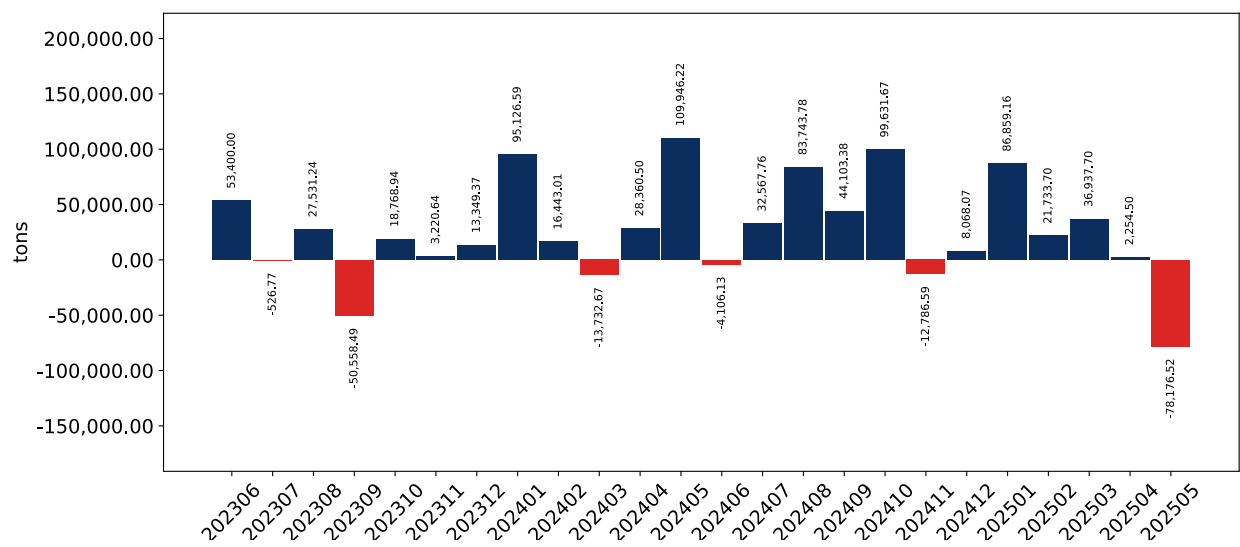
This section presents detailed and the most recent data on the imports of a specific commodity to a chosen country over the past 24 months for which relevant statistics is published and available. It encompasses monthly import figures in tons, year-on-year changes, anomalies in import patterns, factors driving short-term fluctuations, and includes a quantitative estimation of short-term import trends as additional information.

Figure 9. Monthly Imports of Italy, tons 1.4% 18.09%
monthly annualized



Monthly imports of Italy changed at a rate of 1.4%, while the annualized growth rate for these 2 years was 18.09%. The dashed line is a linear trend for Imports. Volumes are not seasonally adjusted.

Figure 10. Y-o-Y Monthly Level Change of Imports of Italy, tons



Year-over-year monthly imports change depicts fluctuations of imports operations in Italy. The more positive values are on chart, the more vigorous the country in importing of Cement clinkers. Negative values may be a signal of market contraction. Volumes in columns are in tons.

SHORT-TERM TRENDS: IMPORTS VOLUMES

This section presents detailed and the most recent data on the imports of a specific commodity into a chosen country over the past 24 months for which relevant statistics is published and available. It encompasses monthly import figures in tons, year-on-year changes, anomalies in import patterns, factors driving short-term fluctuations, and includes a quantitative estimation of short-term import trends as additional information.

Key points:

- i. The dynamics of the market of Cement clinkers in Italy in LTM period demonstrated a fast growing trend with a growth rate of 20.52%. To compare, a 5-year CAGR for 2020-2024 was 27.84%.
 - ii. With this trend preserved, the expected monthly growth of imports in the coming period may reach the level of 1.4%, or 18.09% on annual basis.
 - iii. Data for monthly imports over the last 12 months contain 2 record(s) of higher and no record(s) of lower values compared to any value for the 48-months period before.
-
- a. In LTM period (06.2024 - 05.2025) Italy imported Cement clinkers at the total amount of 1,884,650.33 tons. This is 20.52% change compared to the corresponding period a year before.
 - b. The growth of imports of Cement clinkers to Italy in value terms in LTM underperformed the long-term imports growth of this product.
 - c. Imports of Cement clinkers to Italy for the most recent 6-month period (12.2024 - 05.2025) outperform the level of Imports for the same period a year before (9.25% change).
 - d. A general trend for market dynamics in 06.2024 - 05.2025 is fast growing. The expected average monthly growth rate of imports of Cement clinkers to Italy in tons is 1.4% (or 18.09% on annual basis).
 - e. Monthly dynamics of imports in last 12 months included 2 record(s) that exceeded the highest/peak value of imports achieved in the preceding 48 months, and no record(s) that bypass the lowest value of imports in the same period in the past.

SHORT-TERM TRENDS: PROXY PRICES

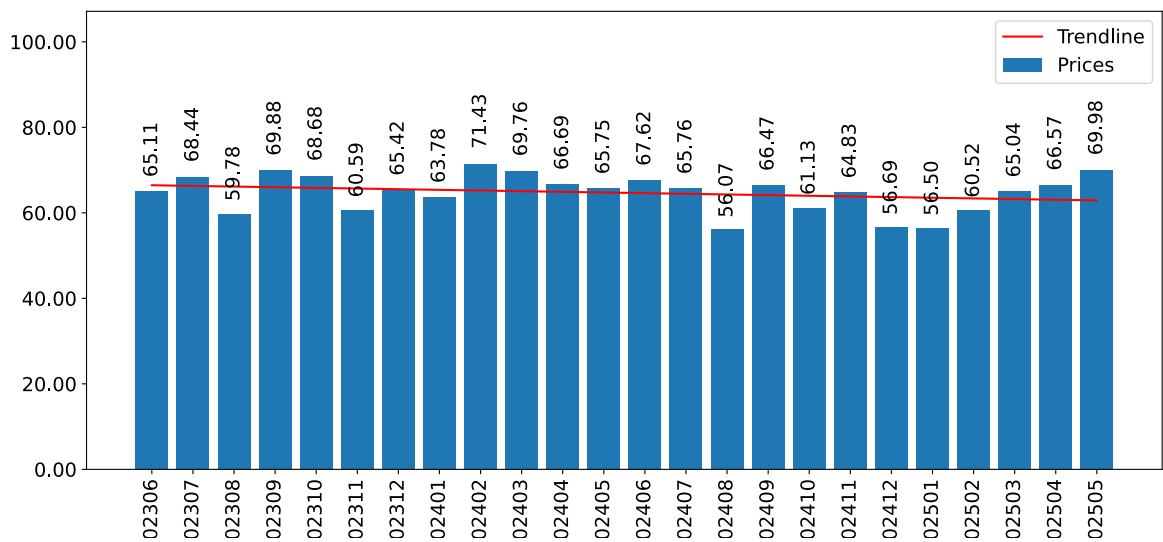
This section provides a quantitative assessment of short-term price fluctuations. It includes details on the monthly proxy price changes, an estimation of the short-term trend in proxy price levels, and identification of any anomalies in price dynamics.

Key points:

- i. The average level of proxy price on imports in LTM period (06.2024-05.2025) was 62.78 current US\$ per 1 ton, which is a -5.29% change compared to the same period a year before. A general trend for proxy price change was stagnating.
- ii. Growth in demand was a leading driver of the Country Market Short-term Development.
- iii. With this trend preserved, the expected monthly growth of the proxy price level in the coming period may reach the level of -0.24%, or -2.82% on annual basis.

Figure 11. Average Monthly Proxy Prices on Imports, current US\$/ton

-0.24% -2.82%
monthly annualized

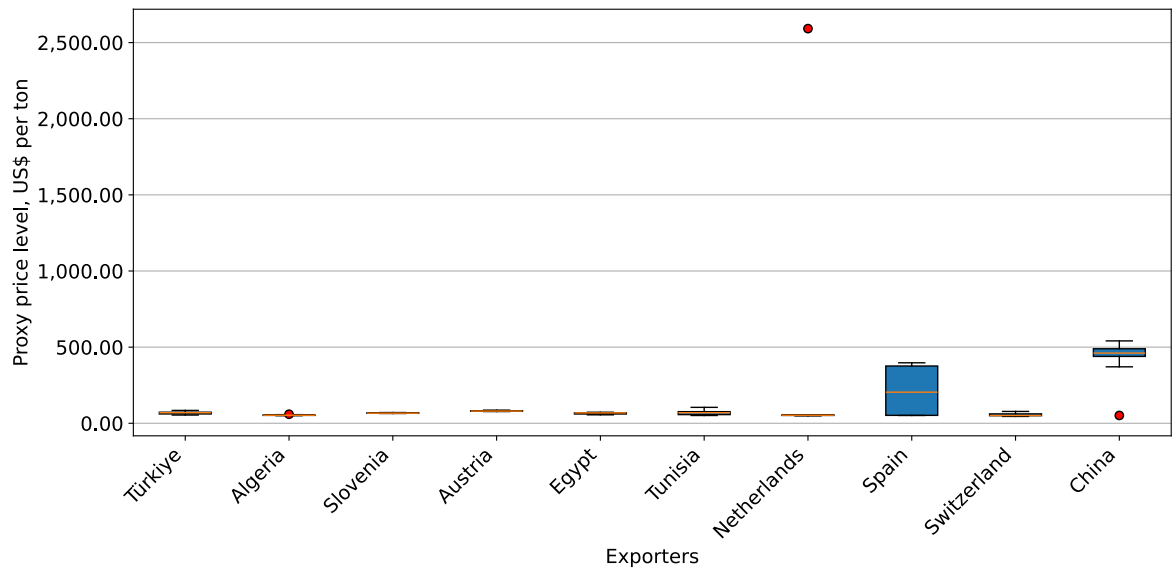


- a. The estimated average proxy price on imports of Cement clinkers to Italy in LTM period (06.2024-05.2025) was 62.78 current US\$ per 1 ton.
- b. With a -5.29% change, a general trend for the proxy price level is stagnating.
- c. Changes in levels of monthly proxy prices on imports for the past 12 months consists of no record(s) with values exceeding the highest level of proxy prices for the preceding 48-months period, and no record(s) with values lower than the lowest value of proxy prices in the same period.
- d. It is highly likely, that growth in demand was a leading driver of the short-term fluctuations in the market.

SHORT-TERM TRENDS: PROXY PRICES

This section provides comprehensive details on proxy price levels in a form of box plot. It facilitates the analysis and comparison of proxy prices of the selected good supplied by other countries.

Figure 12. LTM Average Monthly Proxy Prices by Largest Suppliers, Current US\$ / ton



The chart shows distribution of proxy prices on imports for the period of LTM (06.2024-05.2025) for Cement clinkers exported to Italy by largest exporters. The box height shows the range of the middle 50% of levels of proxy price on imports formed in LTM. The higher the box, the wider the spread of proxy prices. The line within the box, a median level of the proxy price level on imports, marks the midpoint of per country data set: half the prices are greater than or equal to this value, and half are less. The upper and lower whiskers represent values of proxy prices outside the middle 50%, that is, the lower 25% and the upper 25% of the proxy price levels. The lowest proxy price level is at the end of the lower whisker, while the highest is at the end of the higher whisker. Red dots represent unusually high or low values (i.e., outliers), which are not included in the box plot.

6

COUNTRY COMPETITION LANDSCAPE

COMPETITION LANDSCAPE: TRADE PARTNERS, VALUES

This section provides an analysis of the trade partner distribution for the selected product imports to the chosen country, focusing on imports values. The countries listed in the table are ranked from the largest to the smallest trade partners, based on the imports values from the most recent available calendar year.

The five largest exporters of Cement clinkers to Italy in 2024 were: Türkiye, Algeria, Slovenia, Egypt and Austria.

Table 1. Country's Imports by Trade Partners, K current US\$

Partner	2019	2020	2021	2022	2023	2024	Jan 24 - May 24	Jan 25 - May 25
Türkiye	11,922.2	18,300.9	26,846.7	36,782.3	28,821.8	60,125.4	26,585.6	22,110.3
Algeria	0.0	0.0	2,376.1	20,600.1	39,304.8	27,255.0	13,489.8	15,506.7
Slovenia	15,725.8	15,285.6	12,993.4	10,857.3	11,033.9	12,165.9	2,266.4	1,362.6
Egypt	0.0	0.0	0.0	0.0	601.0	5,730.0	1,569.6	0.0
Austria	13.9	0.0	0.0	0.0	1,294.4	3,280.3	2,107.0	5,388.7
Spain	5.2	0.0	9.0	82.0	464.8	2,768.9	399.3	0.0
Tunisia	2,914.6	1,891.3	8,589.9	7,119.0	399.7	2,116.1	419.7	2,078.9
Netherlands	0.0	1.8	1.6	1.8	4,295.0	1,643.4	419.4	1,158.5
China	321.4	374.0	195.1	0.0	181.0	616.0	315.2	331.2
Switzerland	0.0	0.0	2,135.1	1,792.1	0.0	501.8	0.0	1,277.4
Germany	75.9	65.0	883.2	676.4	176.1	327.1	130.4	116.6
France	1,773.9	1,382.8	976.4	240.1	350.1	221.6	117.5	49.3
Angola	0.0	0.0	0.0	0.0	0.0	4.2	0.0	0.0
Europe, not elsewhere specified	0.0	0.0	0.0	0.0	0.0	2.4	2.4	0.0
Portugal	6.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Others	5,466.3	22.4	42.6	45.9	2,498.1	0.0	0.0	3.6
Total	38,225.5	37,323.9	55,049.1	78,197.0	89,420.8	116,758.0	47,822.2	49,383.8

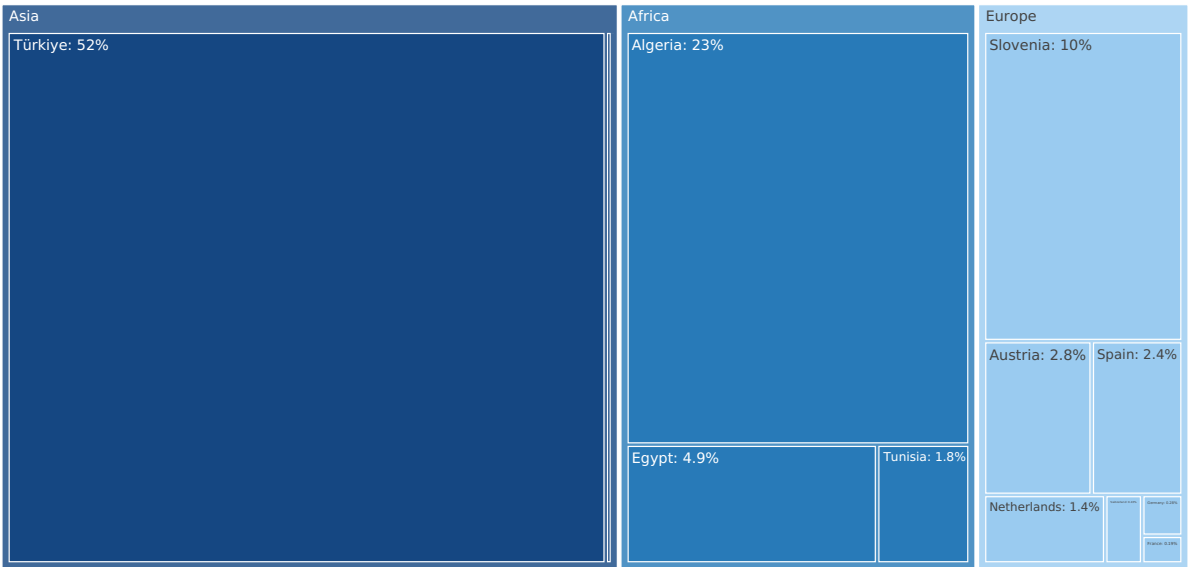
COMPETITION LANDSCAPE: TRADE PARTNERS, VALUES

This section provides an analysis of the trade partner distribution for the selected product imports to the chosen country, focusing on imports values. The countries listed in the table are ranked from the largest to the smallest trade partners, based on the imports values from the most recent available calendar year.

Table 2. Country’s Imports by Trade Partners. Shares in total Imports Values of the Country.

Partner	2019	2020	2021	2022	2023	2024	Jan 24 - May 24	Jan 25 - May 25
Türkiye	31.2%	49.0%	48.8%	47.0%	32.2%	51.5%	55.6%	44.8%
Algeria	0.0%	0.0%	4.3%	26.3%	44.0%	23.3%	28.2%	31.4%
Slovenia	41.1%	41.0%	23.6%	13.9%	12.3%	10.4%	4.7%	2.8%
Egypt	0.0%	0.0%	0.0%	0.0%	0.7%	4.9%	3.3%	0.0%
Austria	0.0%	0.0%	0.0%	0.0%	1.4%	2.8%	4.4%	10.9%
Spain	0.0%	0.0%	0.0%	0.1%	0.5%	2.4%	0.8%	0.0%
Tunisia	7.6%	5.1%	15.6%	9.1%	0.4%	1.8%	0.9%	4.2%
Netherlands	0.0%	0.0%	0.0%	0.0%	4.8%	1.4%	0.9%	2.3%
China	0.8%	1.0%	0.4%	0.0%	0.2%	0.5%	0.7%	0.7%
Switzerland	0.0%	0.0%	3.9%	2.3%	0.0%	0.4%	0.0%	2.6%
Germany	0.2%	0.2%	1.6%	0.9%	0.2%	0.3%	0.3%	0.2%
France	4.6%	3.7%	1.8%	0.3%	0.4%	0.2%	0.2%	0.1%
Angola	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Europe, not elsewhere specified	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portugal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others	14.3%	0.1%	0.1%	0.1%	2.8%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Figure 13. Largest Trade Partners of Italy in 2024, K US\$



The chart shows largest supplying countries and their shares in imports of to in in value terms (US\$). Different colors depict geographic regions.

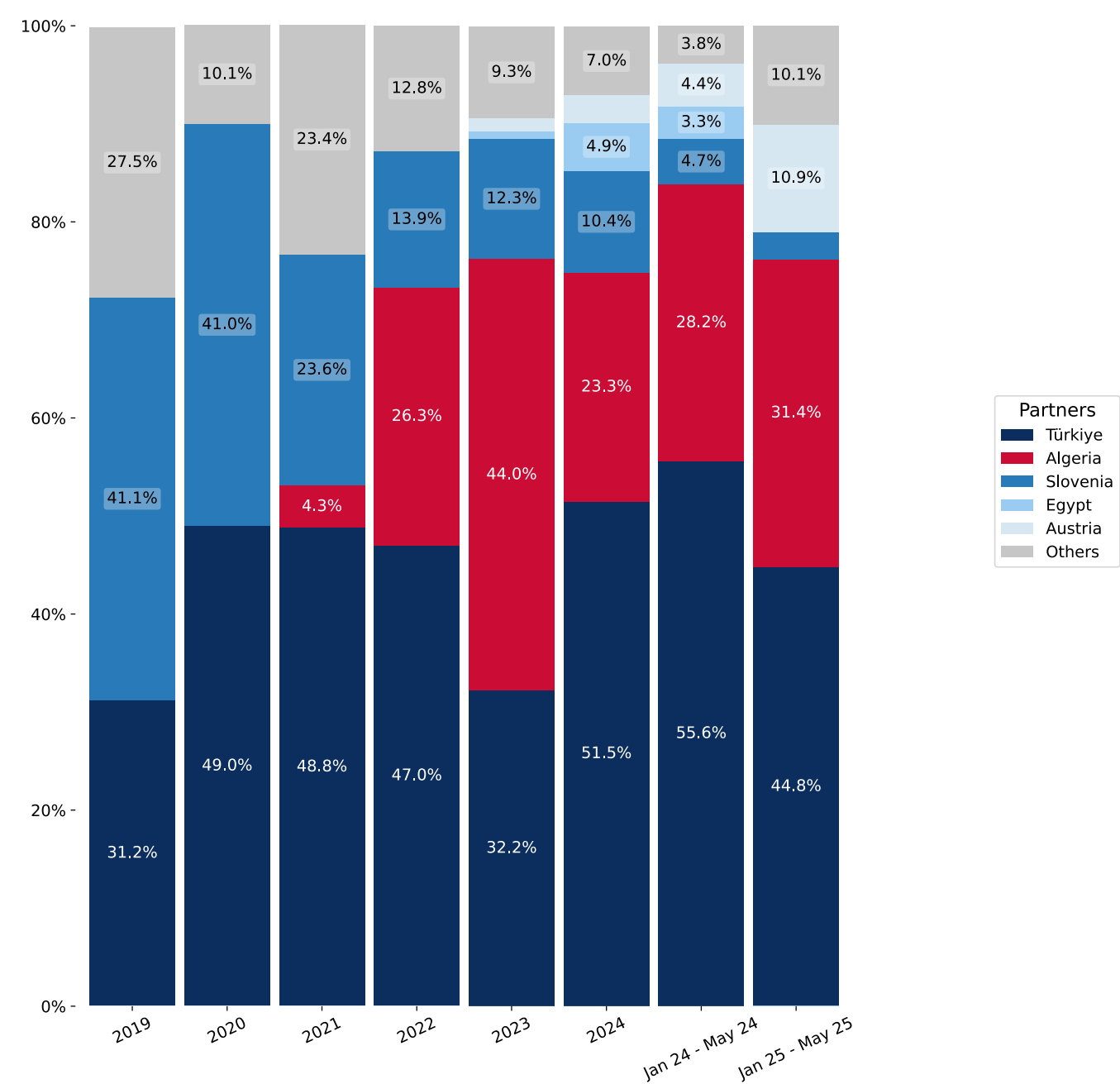
COMPETITION LANDSCAPE: TRADE PARTNERS, VALUES

This graph allows to observe how the shares of key trade partners have been changing over the years.

In Jan 25 - May 25, the shares of the five largest exporters of Cement clinkers to Italy revealed the following dynamics (compared to the same period a year before):

- 1. Türkiye: -10.8 p.p.
- 2. Algeria: 3.2 p.p.
- 3. Slovenia: -1.9 p.p.
- 4. Egypt: -3.3 p.p.
- 5. Austria: 6.5 p.p.

Figure 14. Largest Trade Partners of Italy – Change of the Shares in Total Imports over the Years, K US\$



COMPETITION LANDSCAPE: TRADE PARTNERS, VALUES

This section provides an analysis of the import dynamics from the top five trade partners, with a focus on imports values.

Figure 15. Italy's Imports from Türkiye, K current US\$

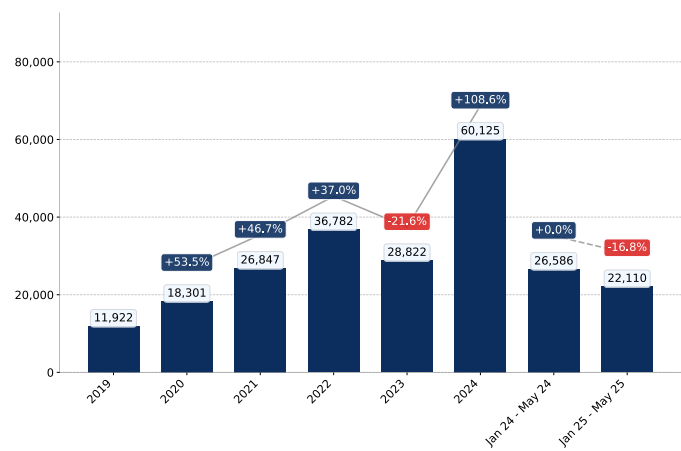


Figure 16. Italy's Imports from Algeria, K current US\$

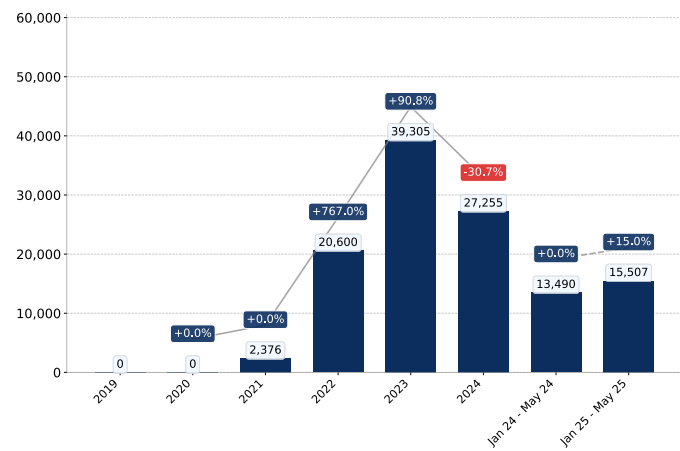


Figure 17. Italy's Imports from Austria, K current US\$

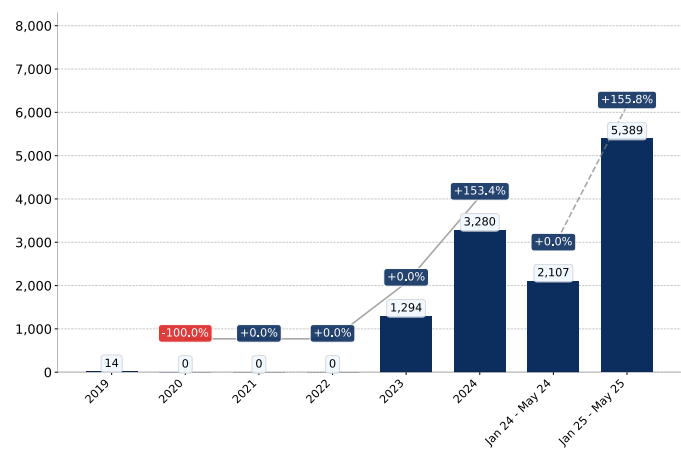


Figure 18. Italy's Imports from Tunisia, K current US\$

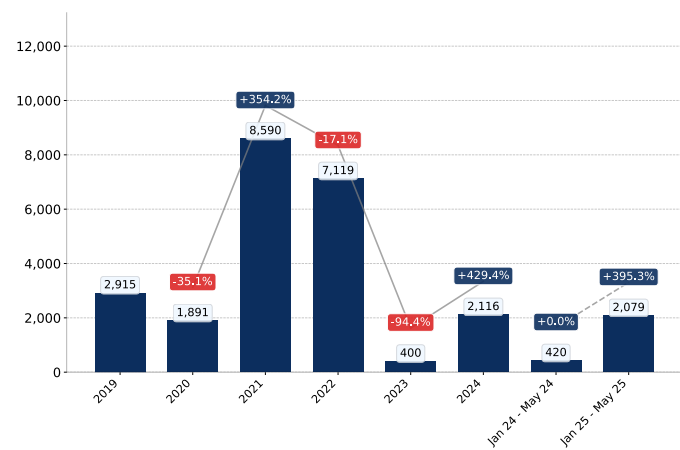
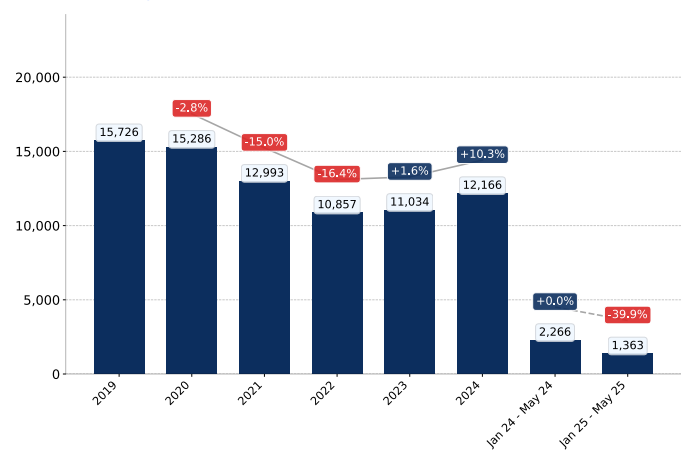


Figure 19. Italy's Imports from Slovenia, K current US\$



COMPETITION LANDSCAPE: TRADE PARTNERS, VALUES

The figures in this section demonstrate the monthly dynamics of imports from key trade partners (values) in the most recent 24 months.

Figure 20. Italy's Imports from Türkiye, K US\$

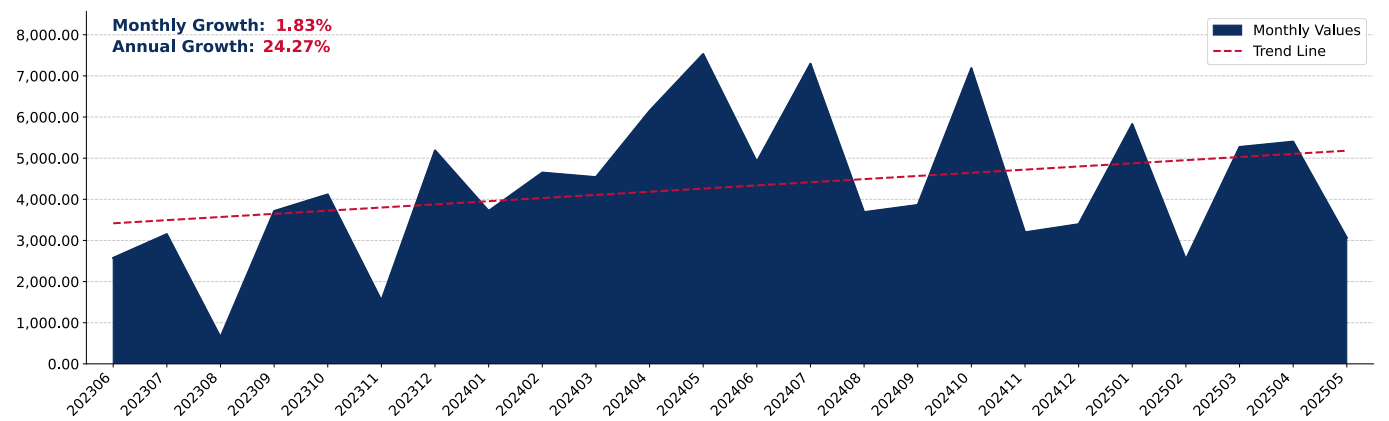


Figure 21. Italy's Imports from Algeria, K US\$

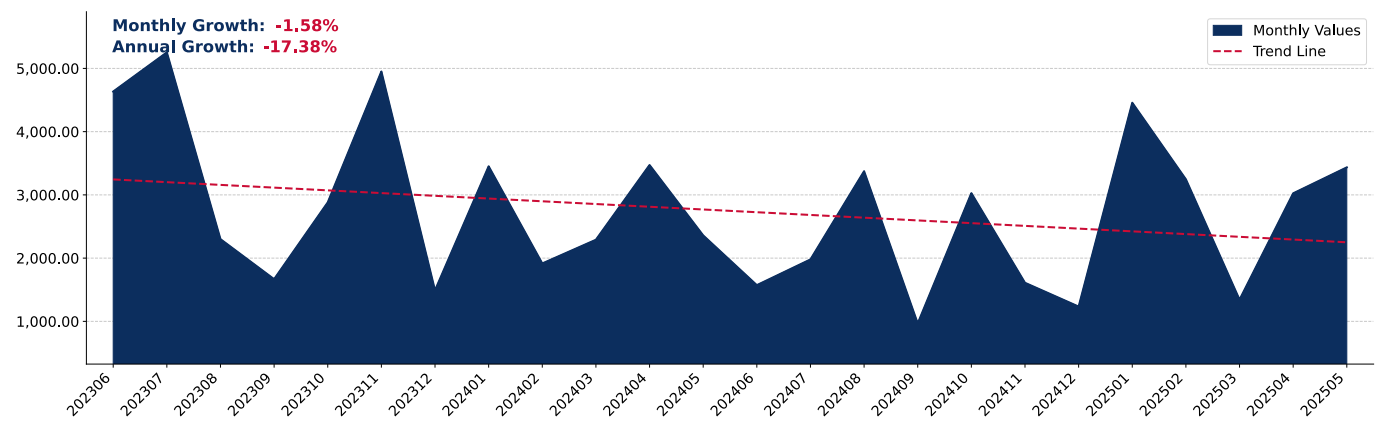
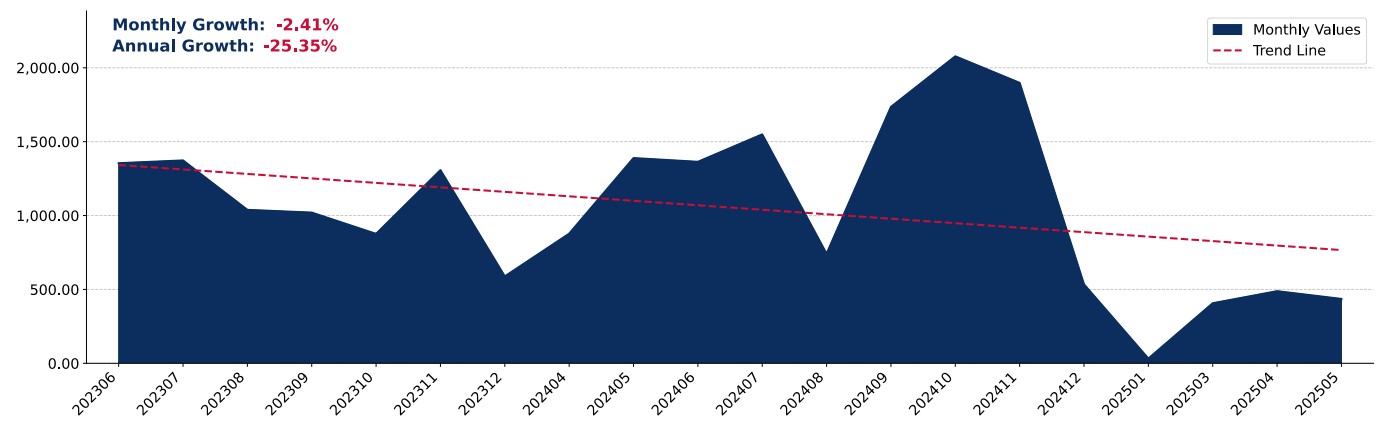


Figure 22. Italy's Imports from Slovenia, K US\$



COMPETITION LANDSCAPE: TRADE PARTNERS, VALUES

The figures in this section demonstrate the monthly dynamics of imports from key trade partners (values) in the most recent 24 months.

Figure 28. Italy's Imports from Austria, K US\$

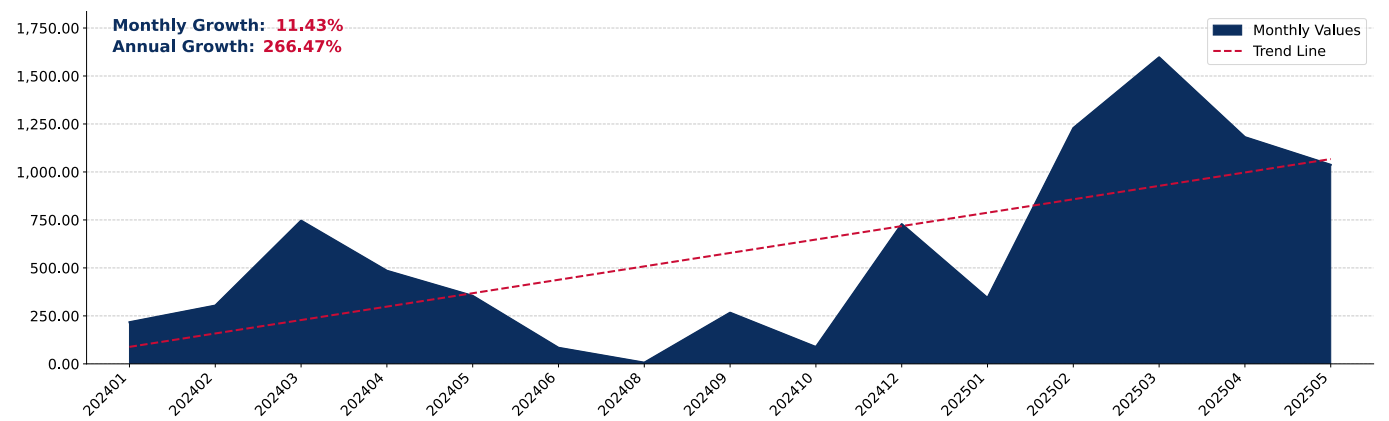
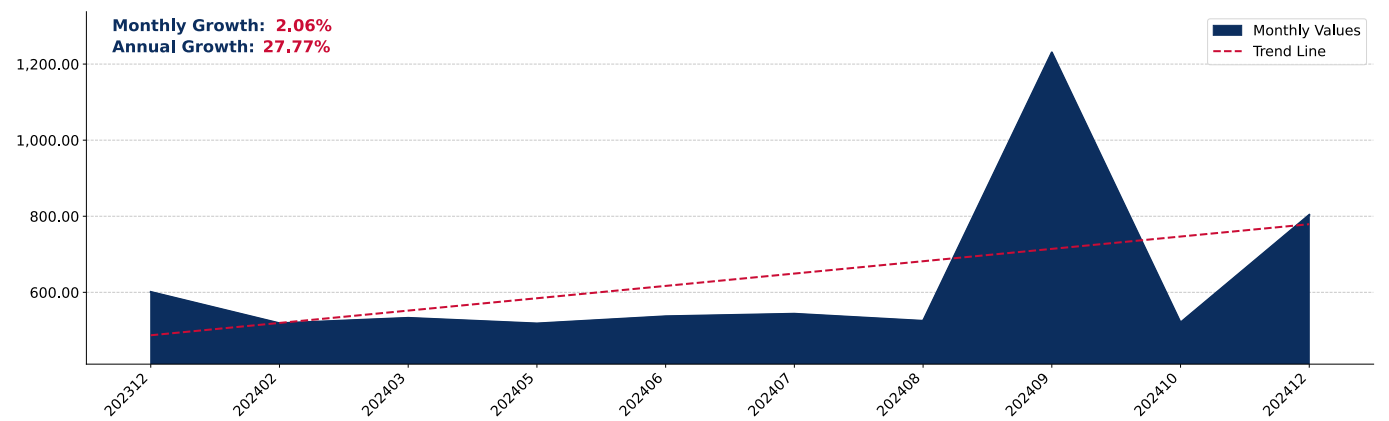


Figure 29. Italy's Imports from Egypt, K US\$



COMPETITION LANDSCAPE: TRADE PARTNERS, VOLUMES

This section provides an analysis of the trade partner distribution for the selected product imports to the chosen country, focusing on physical import volumes. The countries listed in the table are ranked from the largest to the smallest trade partners, based on the import volumes from the most recent available calendar year.

By import volumes, expressed in tons, the five largest exporters of Cement clinkers to Italy in 2024 were: Türkiye, Algeria, Slovenia, Egypt and Spain.

Table 3. Country's Imports by Trade Partners, tons

Partner	2019	2020	2021	2022	2023	2024	Jan 24 - May 24	Jan 25 - May 25
Türkiye	195,990.0	333,610.0	405,070.0	421,845.0	352,460.0	875,781.0	370,362.0	334,680.8
Algeria	0.0	0.0	41,250.0	324,159.9	646,113.2	493,418.7	233,609.0	285,896.8
Slovenia	308,335.8	296,539.7	272,096.9	225,328.0	172,056.2	183,794.3	34,489.5	19,761.9
Egypt	0.0	0.0	0.0	0.0	8,300.0	90,880.0	22,800.0	0.0
Spain	14.2	0.0	22.7	206.5	8,236.5	53,226.7	7,740.0	0.0
Austria	336.2	0.0	0.0	0.0	16,664.3	40,835.3	25,942.7	66,814.3
Tunisia	66,175.9	44,168.2	172,726.0	122,330.8	5,999.0	32,015.2	8,060.0	31,501.0
Netherlands	0.0	157.5	11.2	123.0	77,632.2	31,841.3	8,115.9	22,658.6
Switzerland	0.0	0.0	33,468.6	34,367.7	0.0	10,766.9	0.0	19,525.6
China	926.0	1,072.0	696.0	0.0	408.0	1,273.0	649.0	624.0
Germany	481.2	162.8	21,520.3	1,161.6	374.7	854.9	297.2	261.2
France	4,954.8	3,745.3	2,257.6	532.5	571.9	344.0	174.8	72.0
Europe, not elsewhere specified	0.0	0.0	0.0	0.0	0.0	6.0	6.0	0.0
Angola	0.0	0.0	0.0	0.0	0.0	4.4	0.0	0.0
Portugal	17.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Others	40,519.3	119.8	49.4	103.9	38,860.3	0.0	0.0	58.3
Total	617,751.0	679,575.1	949,168.7	1,130,158.9	1,327,676.2	1,815,041.8	712,246.1	781,854.7

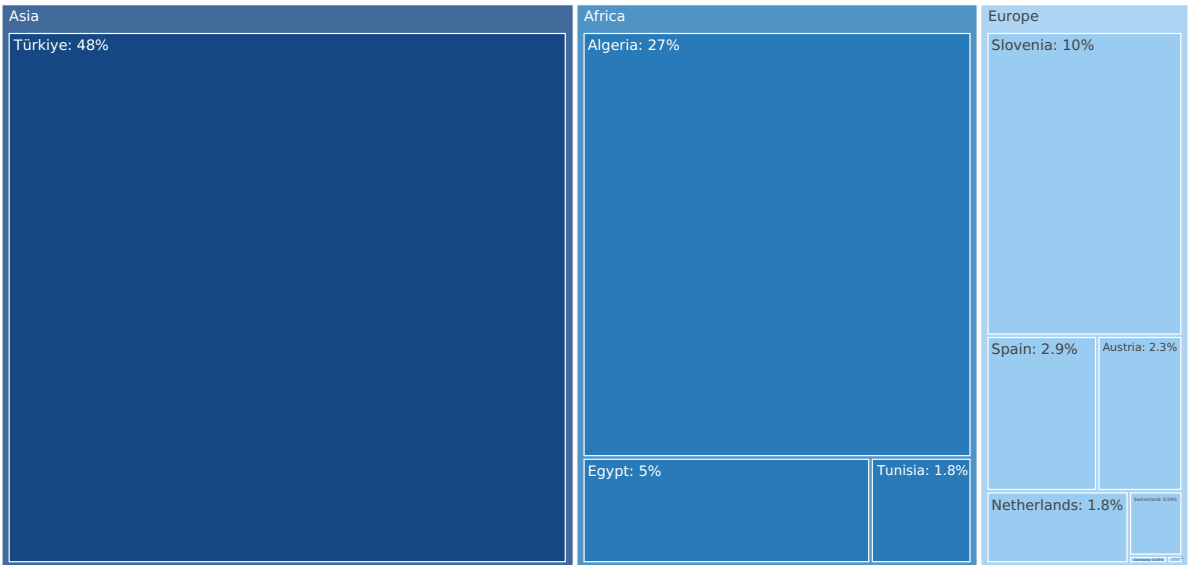
COMPETITION LANDSCAPE: TRADE PARTNERS, VOLUMES

This section offers an analysis of the changes in the distribution of trade partners for the selected product imports to the chosen country, with a focus on physical import volumes. The table illustrates how the trade partner distribution has evolved over the analyzed period.

Table 4. Country's Imports by Trade Partners. Shares in total Imports Volume of the Country.

Partner	2019	2020	2021	2022	2023	2024	Jan 24 - May 24	Jan 25 - May 25
Türkiye	31.7%	49.1%	42.7%	37.3%	26.5%	48.3%	52.0%	42.8%
Algeria	0.0%	0.0%	4.3%	28.7%	48.7%	27.2%	32.8%	36.6%
Slovenia	49.9%	43.6%	28.7%	19.9%	13.0%	10.1%	4.8%	2.5%
Egypt	0.0%	0.0%	0.0%	0.0%	0.6%	5.0%	3.2%	0.0%
Spain	0.0%	0.0%	0.0%	0.0%	0.6%	2.9%	1.1%	0.0%
Austria	0.1%	0.0%	0.0%	0.0%	1.3%	2.2%	3.6%	8.5%
Tunisia	10.7%	6.5%	18.2%	10.8%	0.5%	1.8%	1.1%	4.0%
Netherlands	0.0%	0.0%	0.0%	0.0%	5.8%	1.8%	1.1%	2.9%
Switzerland	0.0%	0.0%	3.5%	3.0%	0.0%	0.6%	0.0%	2.5%
China	0.1%	0.2%	0.1%	0.0%	0.0%	0.1%	0.1%	0.1%
Germany	0.1%	0.0%	2.3%	0.1%	0.0%	0.0%	0.0%	0.0%
France	0.8%	0.6%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Europe, not elsewhere specified	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Angola	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Portugal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others	6.6%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Figure 30. Largest Trade Partners of Italy in 2024, tons



The chart shows largest supplying countries and their shares in imports of to in in volume terms (tons). Different colors depict geographic regions.

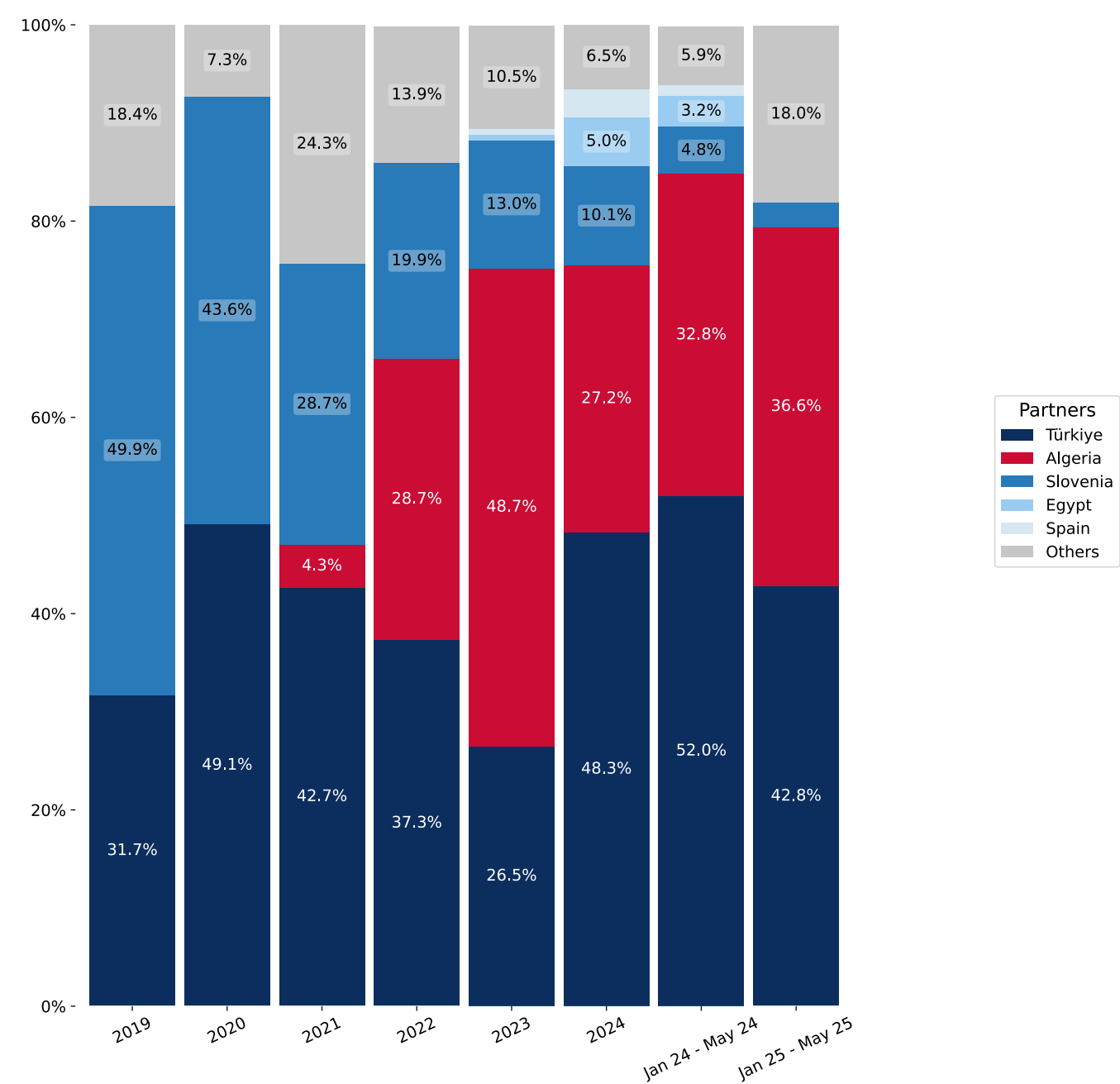
COMPETITION LANDSCAPE: TRADE PARTNERS, VOLUMES

This graph allows to observe how the shares of key trade partners have been changing over the years.

In Jan 25 - May 25, the shares of the five largest exporters of Cement clinkers to Italy revealed the following dynamics (compared to the same period a year before) (in terms of volumes):

- 1. Türkiye: -9.2 p.p.
- 2. Algeria: 3.8 p.p.
- 3. Slovenia: -2.3 p.p.
- 4. Egypt: -3.2 p.p.
- 5. Spain: -1.1 p.p.

Figure 31. Largest Trade Partners of Italy – Change of the Shares in Total Imports over the Years, tons



COMPETITION LANDSCAPE: TRADE PARTNERS, VOLUMES

This section provides an analysis of the import dynamics from the top five trade partners, with a focus on physical import volumes.

Figure 32. Italy's Imports from Türkiye, tons

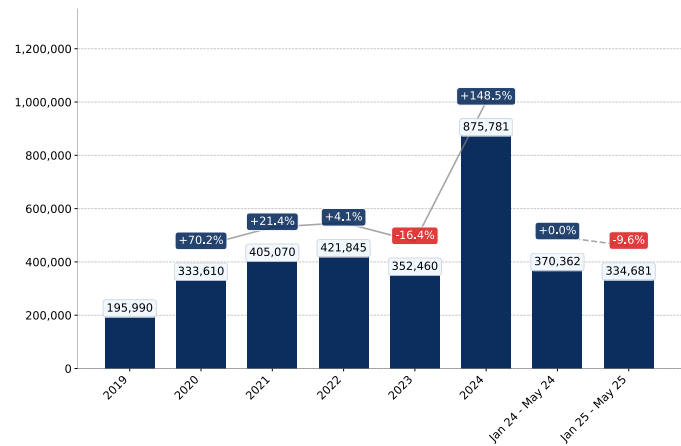


Figure 33. Italy's Imports from Algeria, tons

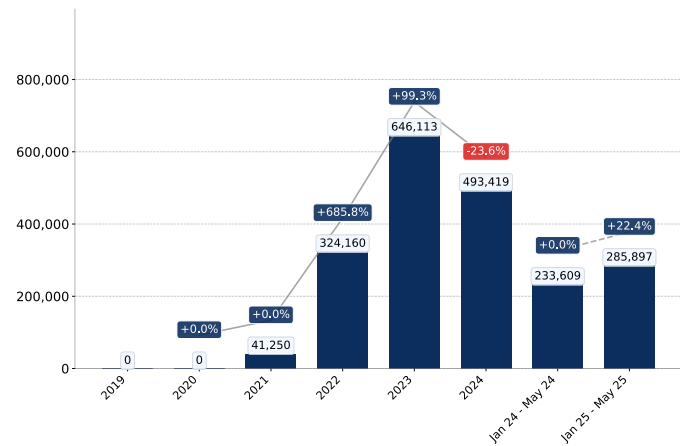


Figure 34. Italy's Imports from Austria, tons

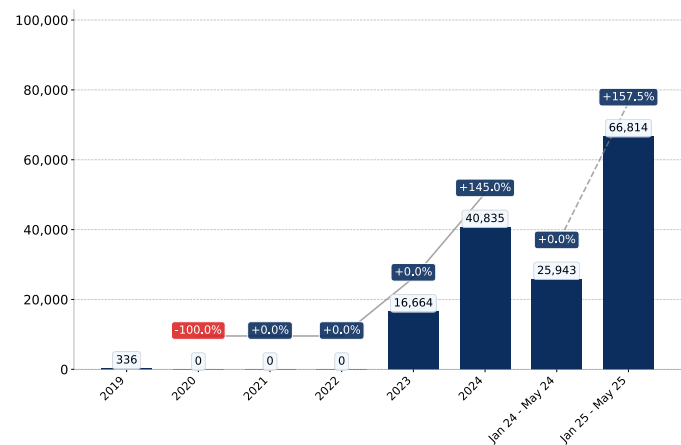


Figure 35. Italy's Imports from Tunisia, tons

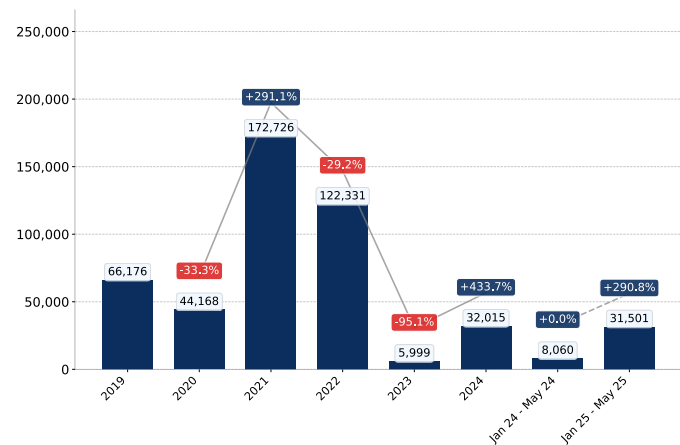
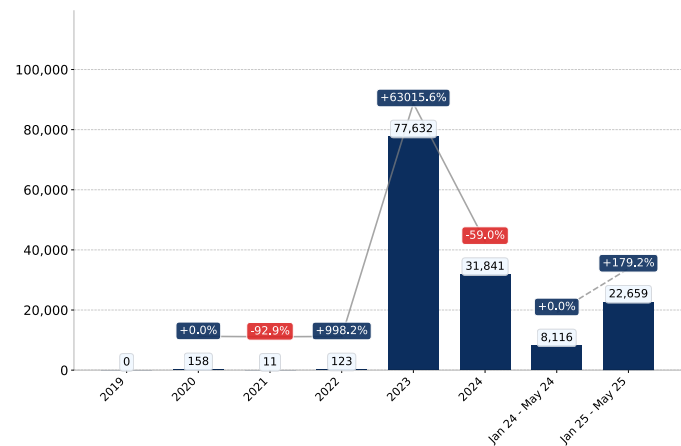


Figure 36. Italy's Imports from Netherlands, tons



COMPETITION LANDSCAPE: TRADE PARTNERS, VOLUMES

The figures in this section demonstrate the monthly dynamics of imports from key trade partners (physical volumes) in the most recent 24 months.

Figure 37. Italy's Imports from Türkiye, tons

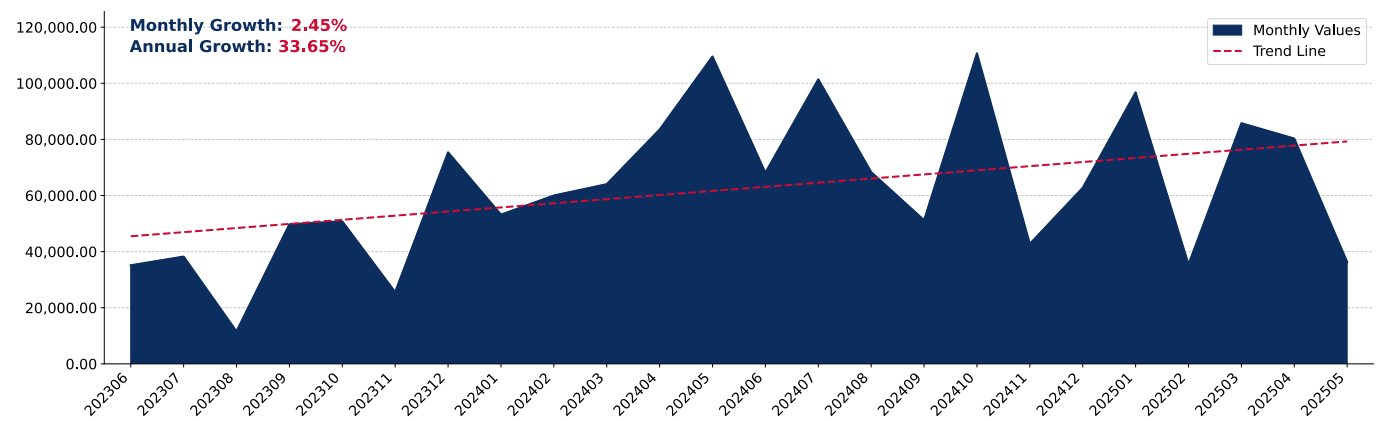


Figure 38. Italy's Imports from Algeria, tons

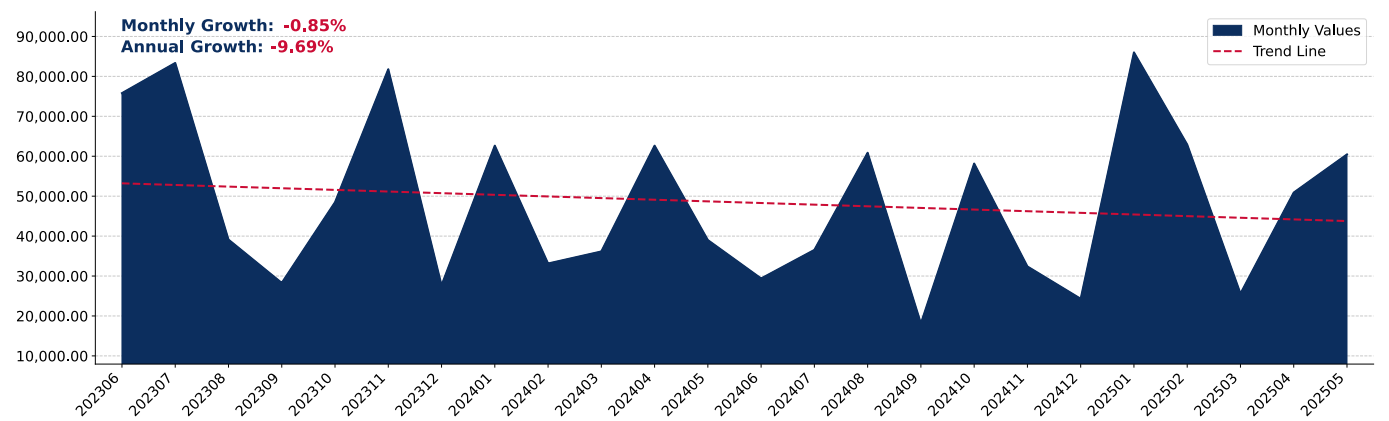
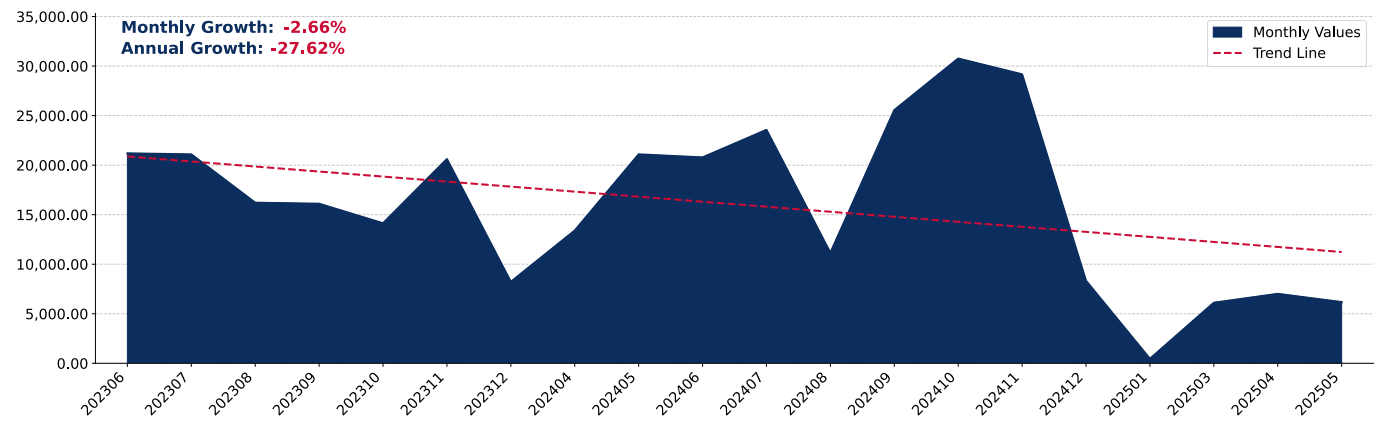


Figure 39. Italy's Imports from Slovenia, tons



COMPETITION LANDSCAPE: TRADE PARTNERS, VOLUMES

The figures in this section demonstrate the monthly dynamics of imports from key trade partners (physical volumes) in the most recent 24 months.

Figure 40. Italy's Imports from Austria, tons

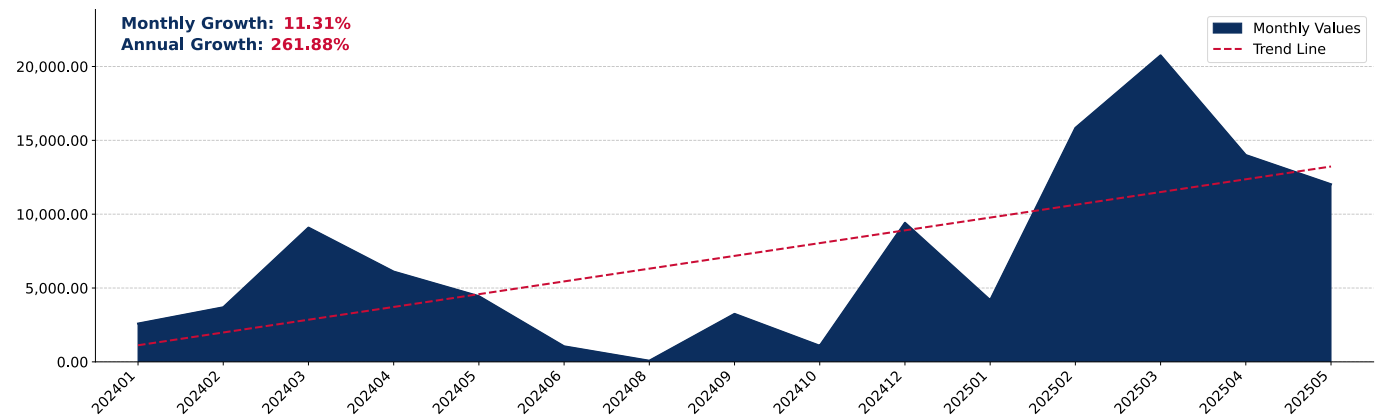
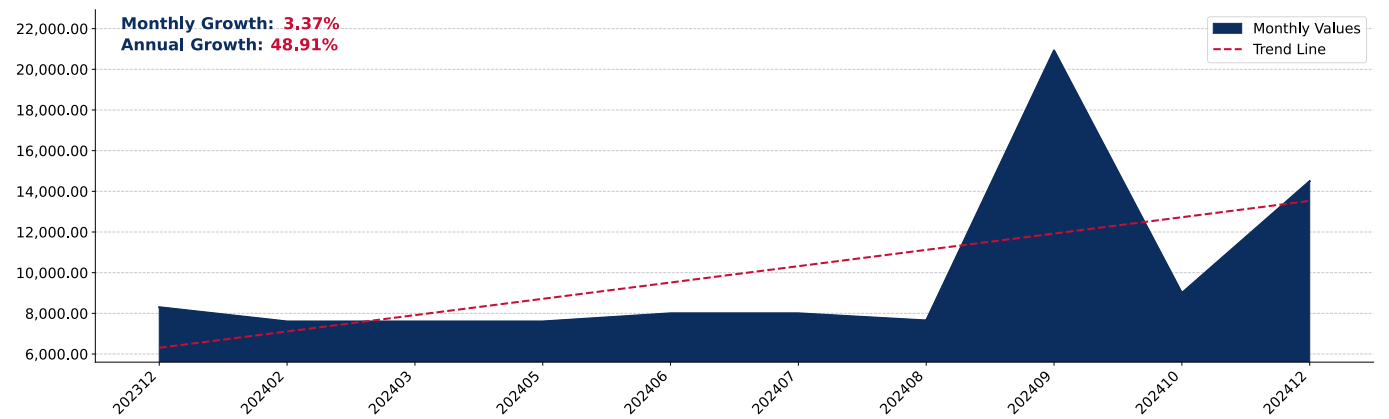


Figure 41. Italy's Imports from Egypt, tons



COMPETITION LANDSCAPE: TRADE PARTNERS, PRICES

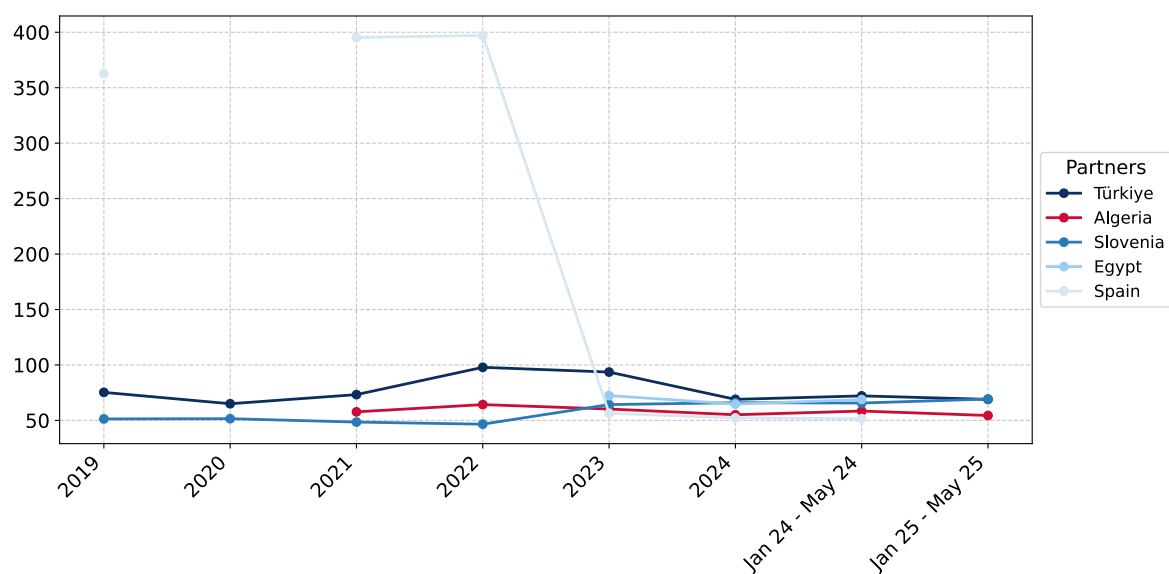
This section shows the average imports prices in recent periods split by trade partners.

Out of top-5 largest supplying countries, the lowest average prices on Cement clinkers imported to Italy were registered in 2024 for Spain, while the highest average import prices were reported for Türkiye. Further, in Jan 25 - May 25, the lowest import prices were reported by Italy on supplies from Algeria, while the most premium prices were reported on supplies from Slovenia.

Table 5. Average Imports Prices by Trade Partners, current US\$ per 1 ton

Partner	2019	2020	2021	2022	2023	2024	Jan 24 - May 24	Jan 25 - May 25
Türkiye	75.3	65.0	73.3	97.9	93.6	69.0	72.1	69.0
Algeria	-	-	57.7	64.2	60.3	55.1	58.4	54.4
Slovenia	51.3	51.6	48.5	46.6	64.3	66.0	65.7	69.2
Egypt	-	-	-	-	72.4	64.7	68.8	-
Spain	362.8	-	395.3	397.1	56.4	52.2	51.6	-
Austria	41.3	-	-	-	77.8	81.0	81.4	81.5
Tunisia	44.8	43.9	50.9	67.3	66.6	69.5	52.1	64.7
Netherlands	-	11.5	190.9	14.8	55.2	559.7	1,321.7	51.1
Switzerland	-	-	66.1	51.3	-	47.3	-	66.0
China	348.8	316.4	291.3	-	443.3	481.5	480.9	524.4
Germany	304.8	410.6	280.1	578.9	489.0	421.9	441.2	446.2
France	354.7	376.4	546.1	472.8	669.9	658.3	717.2	684.7
Europe, not elsewhere specified	-	-	-	-	-	402.3	402.3	-
Angola	-	-	-	-	-	951.0	-	-
Portugal	362.8	-	-	-	-	1,090.5	-	-

Figure 42. Average Imports Prices by Key Trade Partners, current US\$ per 1 ton



COMPETITION LANDSCAPE: VALUE TERMS

This section offers insights into major suppliers of the selected product to a particular country within the last 12 months. A tree-map chart is used to facilitate the identification and better visualization of primary competitors, illustrating market shares in US\$ terms. Additionally, a diagram highlighting suppliers who experienced significant increases or decreases in market shares during the last 12 months complements the analysis. These are winners or losers from the market share perspective.

Figure 45. Country’s Imports by Trade Partners in LTM period, current US\$

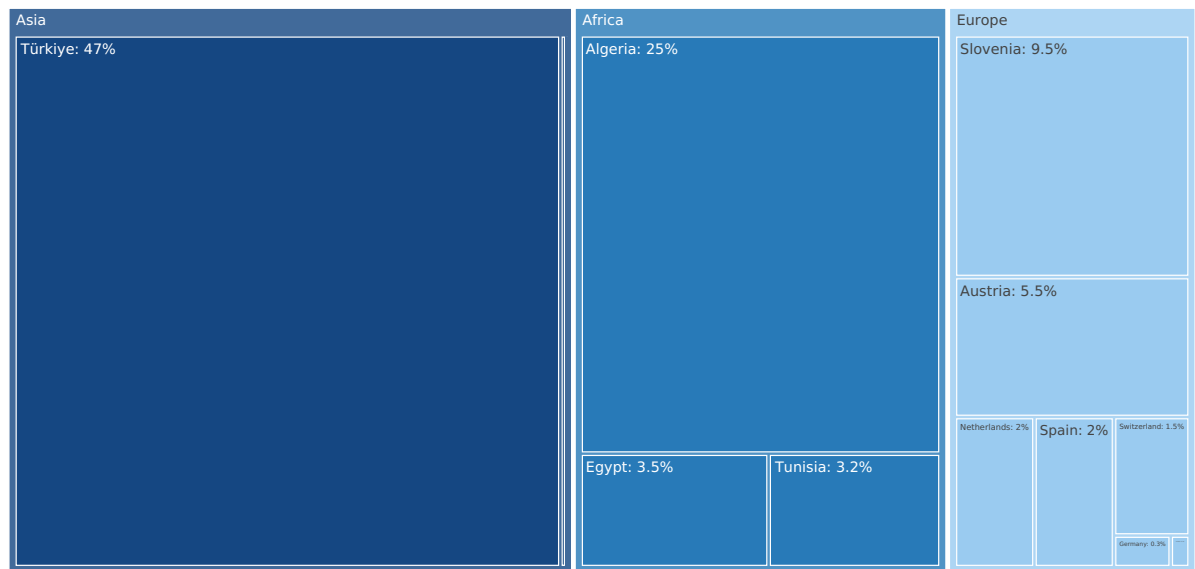


Figure 43. Contribution to Growth of Imports in LTM (June 2024 – May 2025),K US\$

GROWTH CONTRIBUTORS

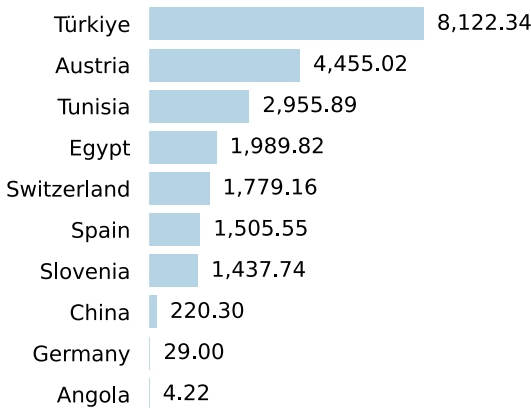
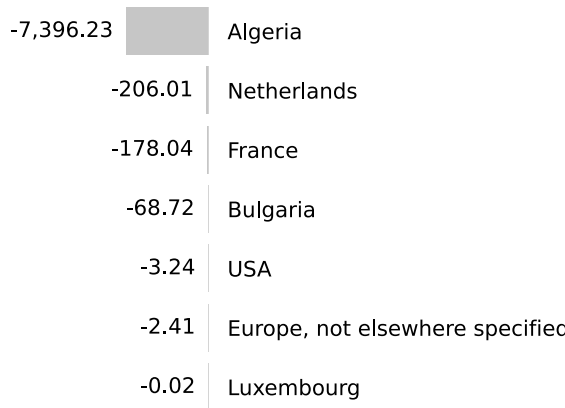


Figure 44. Contribution to Decline of Imports in LTM (June 2024 – May 2025),K US\$

DECLINE CONTRIBUTORS



Total imports change in the period of LTM was recorded at 14,647.99 K US\$

The charts show Top-10 countries with positive and negative contribution to the growth of imports of to in the period of LTM (June 2024 – May 2025 compared to June 2023 – May 2024).

COMPETITION LANDSCAPE: LTM CHANGES

The tables in this section show the imports by trade partners in last twelve months (LTM) period in terms value and their change compared to the same period 12 months before.

Out of top-15 largest supplying countries, the following trade partners of Italy were characterized by the highest increase of supplies of Cement clinkers by value: Türkiye, Algeria and Slovenia.

Table 6. Country's Imports by Trade Partners in LTM period and its Change Compared to the Same Period 12 Months Before, current US\$

Partner	PreLTM	LTM	Change, %
Türkiye	47,527.8	55,650.1	17.1
Algeria	36,668.2	29,271.9	-20.2
Slovenia	9,824.4	11,262.1	14.6
Austria	2,107.0	6,562.0	211.4
Egypt	2,170.6	4,160.4	91.7
Tunisia	819.4	3,775.3	360.7
Netherlands	2,588.5	2,382.5	-8.0
Spain	864.1	2,369.6	174.2
Switzerland	0.0	1,779.2	177,916.5
China	411.7	632.0	53.5
Germany	284.3	313.3	10.2
France	331.5	153.4	-53.7
Angola	0.0	4.2	422.1
Europe, not elsewhere specified	2.4	0.0	-100.0
Portugal	0.0	0.0	0.2
Others	72.0	3.6	-95.0
Total	103,671.7	118,319.7	14.1

COMPETITION LANDSCAPE: VOLUME TERMS

This section offers insights into major suppliers of the selected product to a particular country within the last 12 months. A tree-map chart is used to facilitate the identification and better visualization of primary competitors, illustrating market shares in Ktons. Additionally, a diagram highlighting suppliers who experienced significant increases or decreases in market shares during the last 12 months complements the analysis. These are winners or losers from the market share perspective.

Figure 48. Country’s Imports by Trade Partners in LTM period, tons

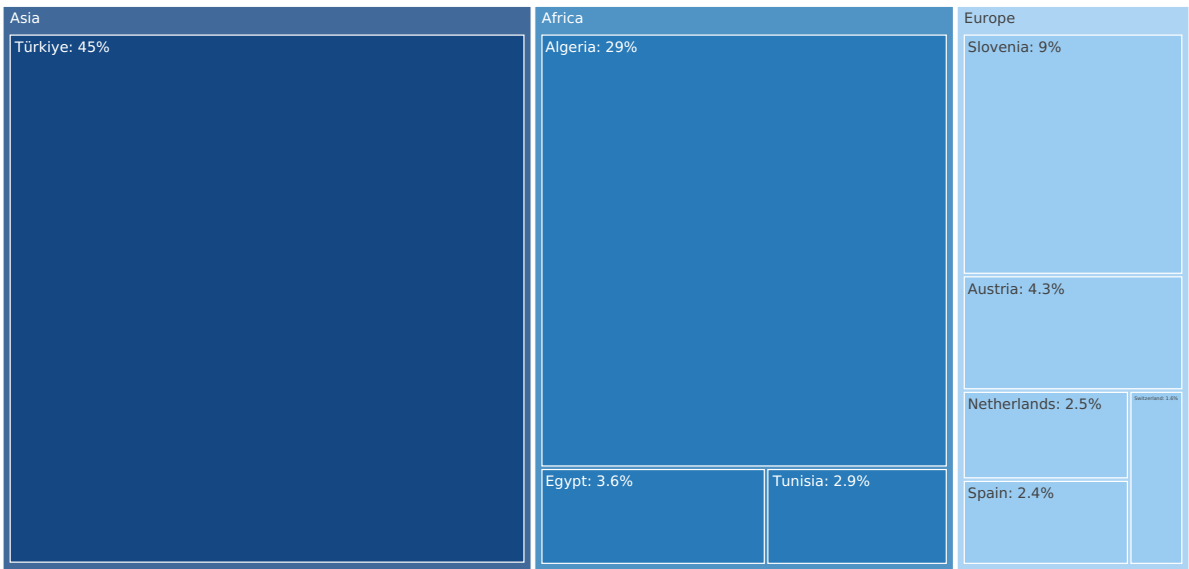


Figure 46. Contribution to Growth of Imports in LTM (June 2024 – May 2025), tons

GROWTH CONTRIBUTORS

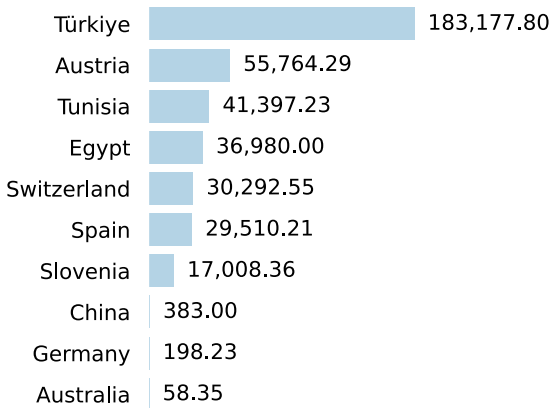
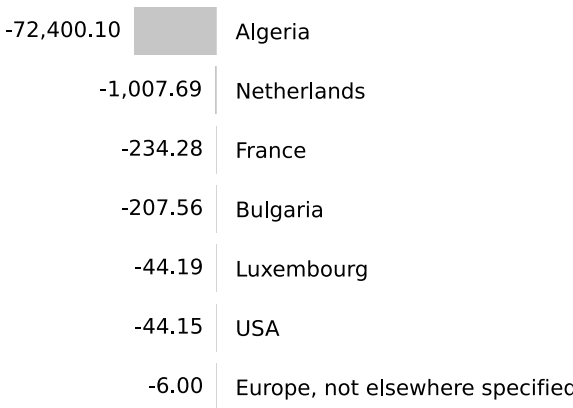


Figure 47. Contribution to Decline of Imports in LTM (June 2024 – May 2025), tons

DECLINE CONTRIBUTORS



Total imports change in the period of LTM was recorded at 320,830.49 tons

The charts show Top-10 countries with positive and negative contribution to the growth of imports of Cement clinkers to Italy in the period of LTM (June 2024 – May 2025 compared to June 2023 – May 2024).

COMPETITION LANDSCAPE: LTM CHANGES

The tables in this section show the imports by trade partners in last twelve months (LTM) period in terms volume and their change compared to the same period 12 months before.

Out of top-15 largest supplying countries, the following trade partners of Italy were characterized by the highest increase of supplies of Cement clinkers by volume: Türkiye, Algeria and Slovenia.

Table 7. Country's Imports by Trade Partners in LTM period and its Change Compared to the Same Period 12 Months Before, tons

Partner	PreLTM	LTM	Change, %
Türkiye	656,922.0	840,099.8	27.9
Algeria	618,106.6	545,706.5	-11.7
Slovenia	152,058.3	169,066.7	11.2
Austria	25,942.7	81,707.0	215.0
Egypt	31,100.0	68,080.0	118.9
Tunisia	14,059.0	55,456.2	294.4
Netherlands	47,391.7	46,384.0	-2.1
Spain	15,976.5	45,486.7	184.7
Switzerland	0.0	30,292.6	3,029,255.0
China	865.0	1,248.0	44.3
Germany	620.7	818.9	31.9
France	475.5	241.2	-49.3
Angola	0.0	4.4	443.8
Europe, not elsewhere specified	6.0	0.0	-100.0
Portugal	0.0	0.0	0.2
Others	295.9	58.3	-80.3
Total	1,563,819.9	1,884,650.3	20.5

COMPETITION LANDSCAPE: GROWTH CONTRIBUTORS

This section offers insights into trade flows of the country with its trade partners, that have recently increased the most their supplies. These are winners from the market share perspective.

Türkiye

Figure 49. Y-o-Y Monthly Level Change of Imports from Türkiye to Italy, tons

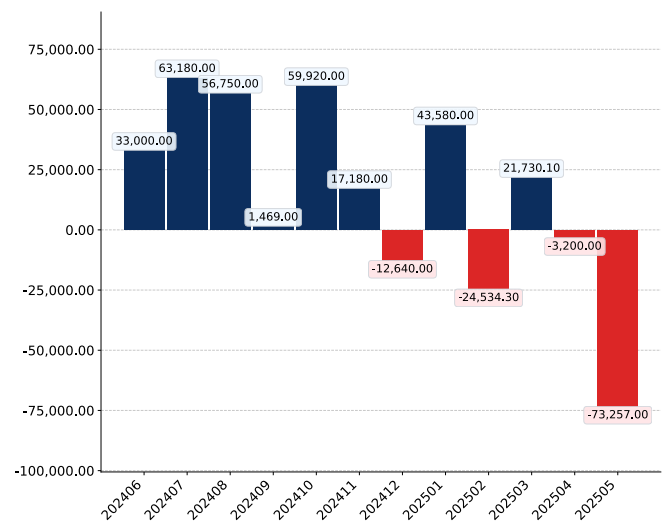


Figure 50. Y-o-Y Monthly Level Change of Imports from Türkiye to Italy, K US\$

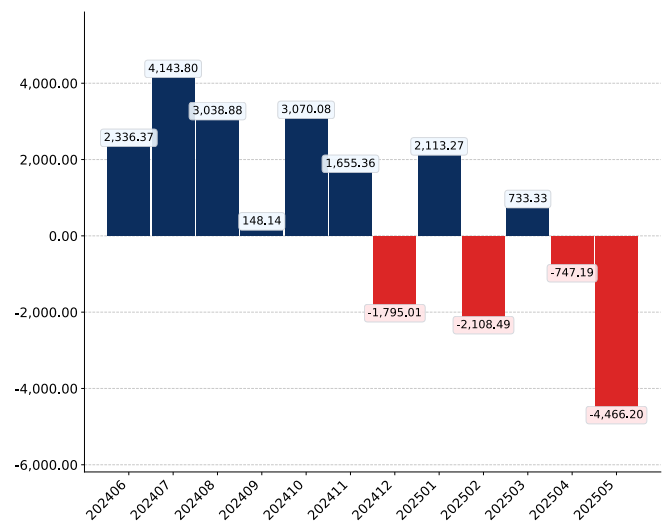
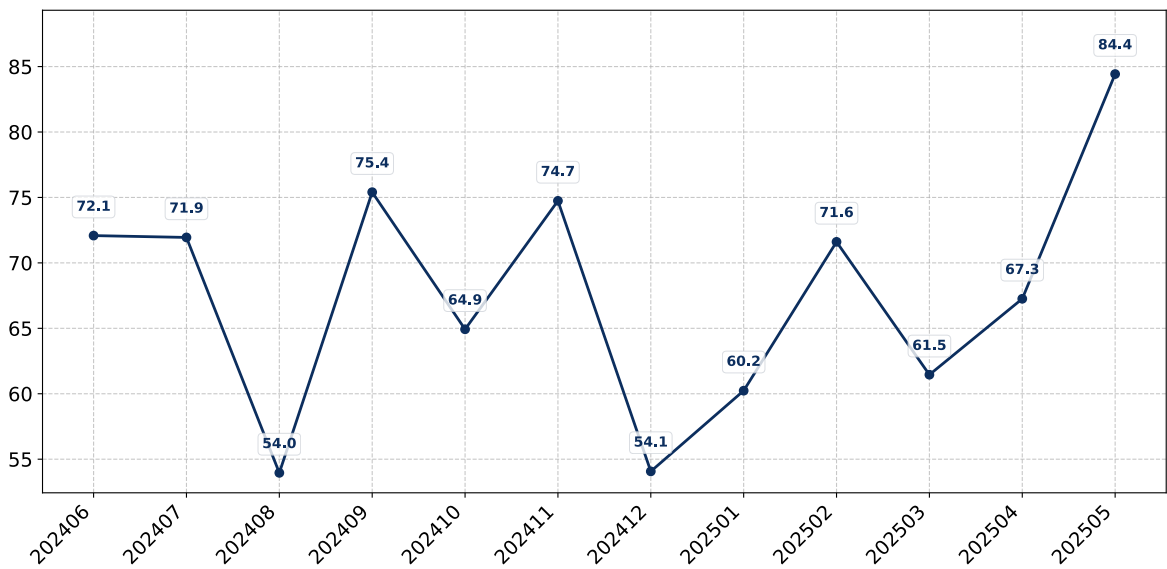


Figure 51. Average Monthly Proxy Prices on Imports from Türkiye to Italy, current US\$/ton



COMPETITION LANDSCAPE: GROWTH CONTRIBUTORS

This section offers insights into trade flows of the country with its trade partners, that have recently increased the most their supplies. These are winners from the market share perspective.

Algeria

Figure 52. Y-o-Y Monthly Level Change of Imports from Algeria to Italy, tons

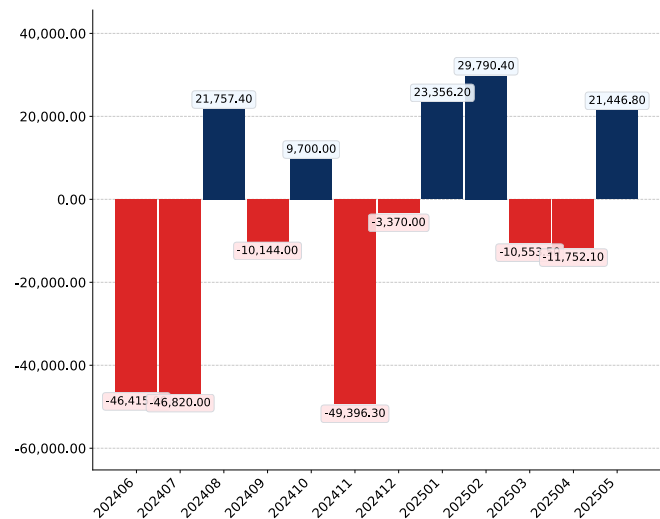


Figure 53. Y-o-Y Monthly Level Change of Imports from Algeria to Italy, K US\$

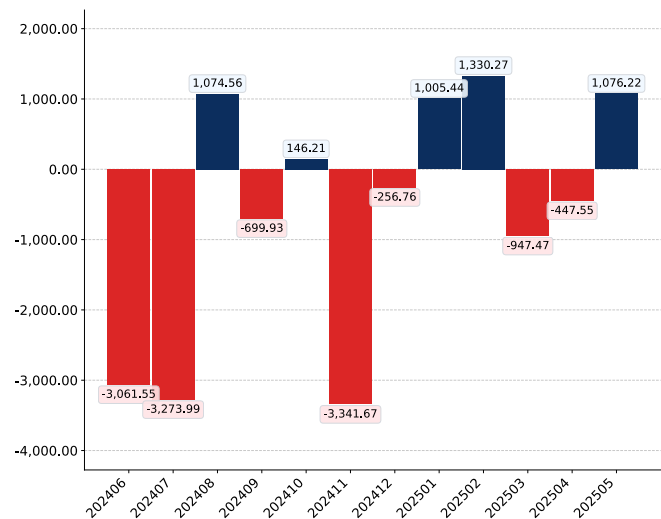
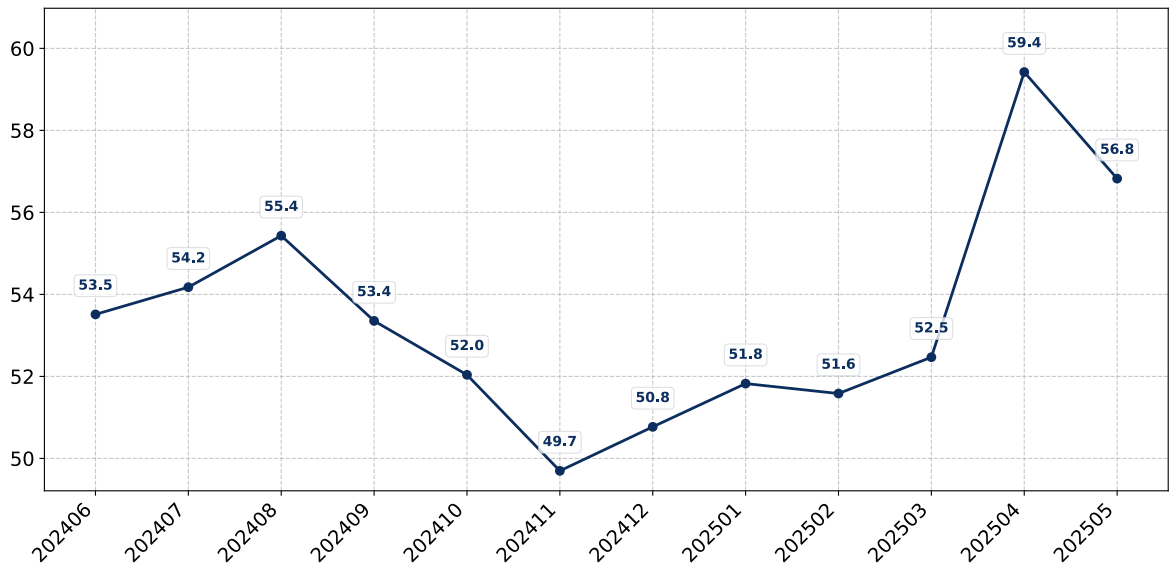


Figure 54. Average Monthly Proxy Prices on Imports from Algeria to Italy, current US\$/ton



COMPETITION LANDSCAPE: GROWTH CONTRIBUTORS

This section offers insights into trade flows of the country with its trade partners, that have recently increased the most their supplies. These are winners from the market share perspective.

Slovenia

Figure 55. Y-o-Y Monthly Level Change of Imports from Slovenia to Italy, tons

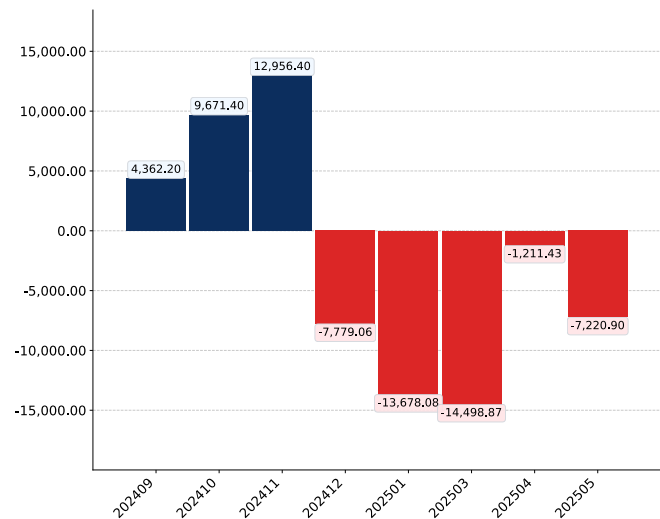


Figure 56. Y-o-Y Monthly Level Change of Imports from Slovenia to Italy, K US\$

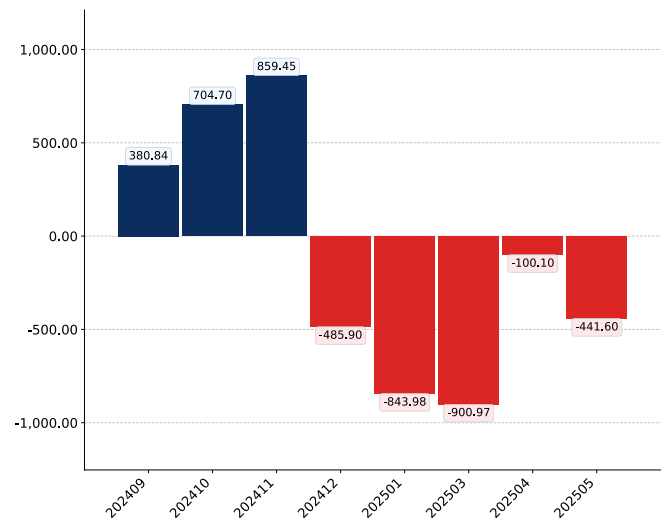
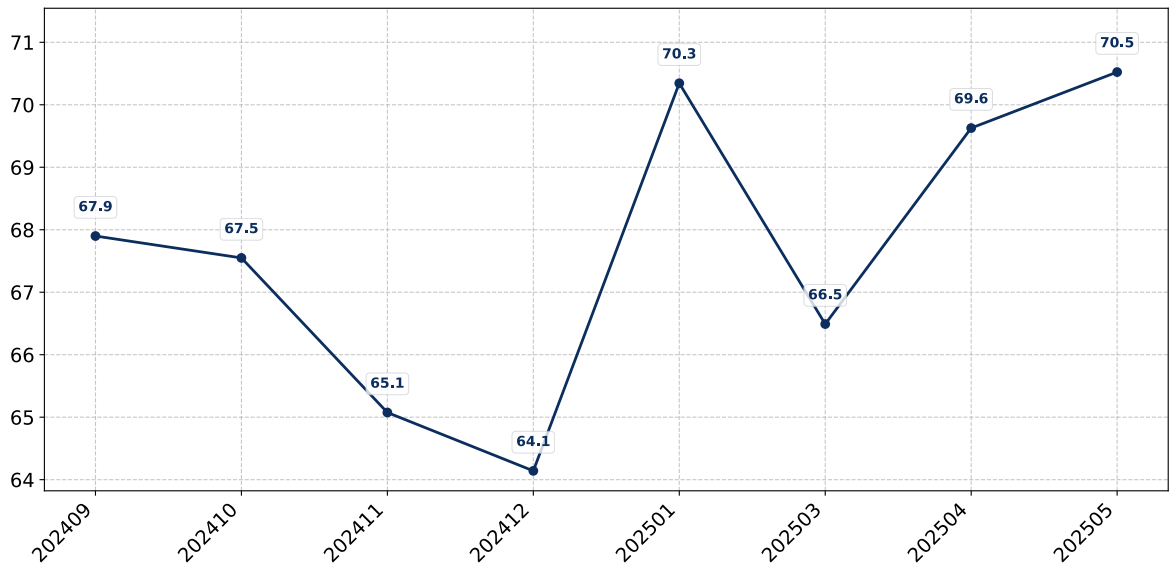


Figure 57. Average Monthly Proxy Prices on Imports from Slovenia to Italy, current US\$/ton



COMPETITION LANDSCAPE: GROWTH CONTRIBUTORS

This section offers insights into trade flows of the country with its trade partners, that have recently increased the most their supplies. These are winners from the market share perspective.

Austria

Figure 58. Y-o-Y Monthly Level Change of Imports from Austria to Italy, tons

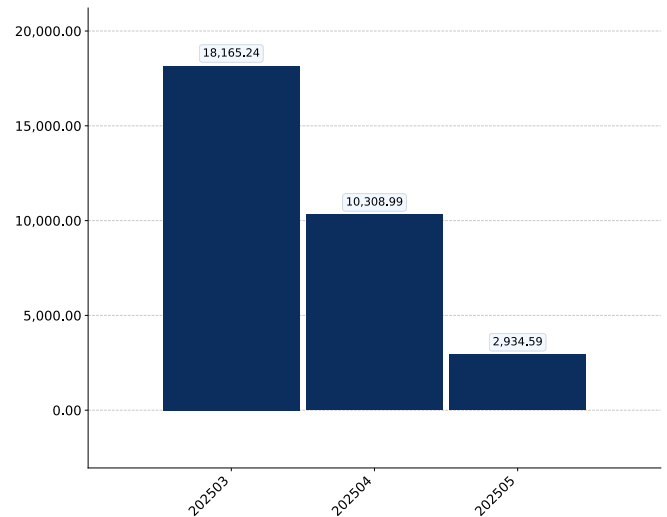


Figure 59. Y-o-Y Monthly Level Change of Imports from Austria to Italy, K US\$

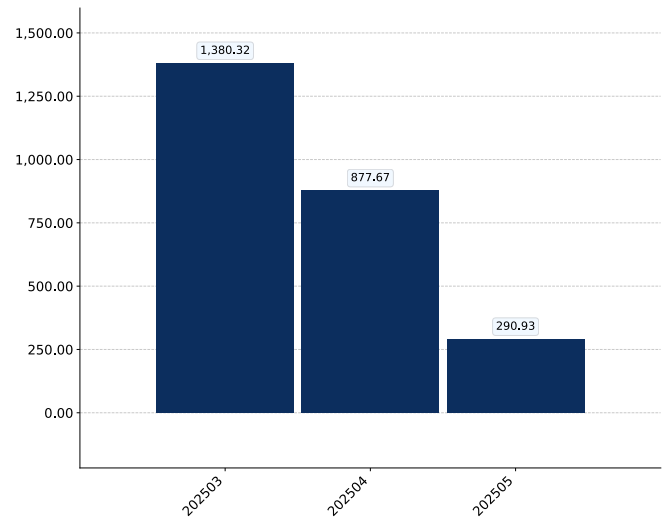
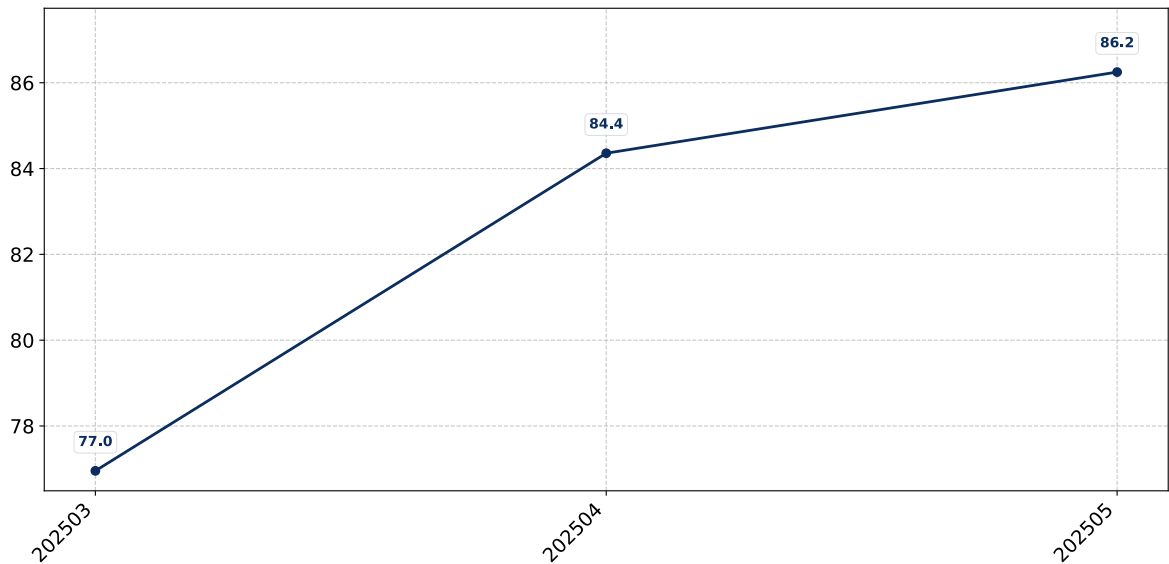


Figure 60. Average Monthly Proxy Prices on Imports from Austria to Italy, current US\$/ton

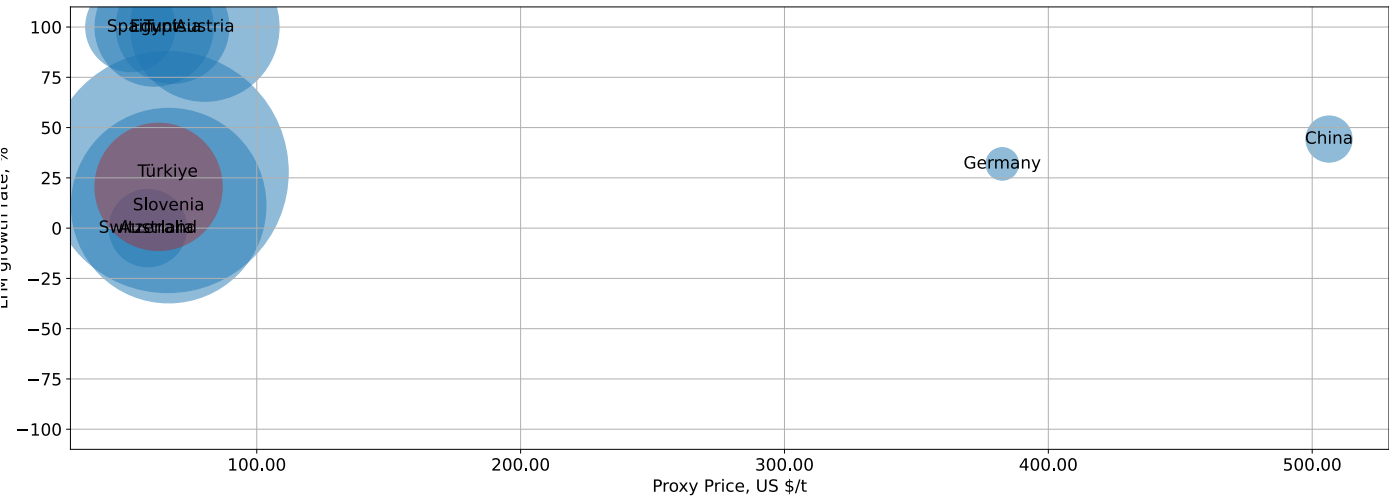


COMPETITION LANDSCAPE: CONTRIBUTORS TO GROWTH

This section presents information about the most successful exporters who managed to significantly increase their supplies over last 12 months. The upper-left corner of the chart highlights countries deemed the most aggressive competitors in the market. The horizontal axis measures the proxy price level offered by suppliers, the vertical axis portrays the growth rate of supplies in volume terms, and the bubble size indicates the extent at which a country-supplier contributed to the growth of imports. The chart encompasses the most recent data spanning the past 12 months.

Figure 61. Top suppliers-contributors to growth of imports of to Italy in LTM (winners)

Average Imports Parameters:
LTM growth rate = 20.52%
Proxy Price = 62.78 US\$ / t



The chart shows the classification of countries who were among the greatest growth contributors in terms of supply of Cement clinkers to Italy:

- Bubble size depicts the volume of imports from each country to Italy in the period of LTM (June 2024 – May 2025).
- Bubble's position on X axis depicts the average level of proxy price on imports of Cement clinkers to Italy from each country in the period of LTM (June 2024 – May 2025).
- Bubble's position on Y axis depicts growth rate of imports of Cement clinkers to Italy from each country (in tons) in the period of LTM (June 2024 – May 2025) compared to the corresponding period a year before.
- Red Bubble represents a theoretical "average" country supplier out of the top-10 countries shown in the Chart.

Various factors may cause these 10 countries to increase supply of Cement clinkers to Italy in LTM. Some may be due to the growth of comparative advantages price wise, others may be related to higher quality or better trade conditions. Below is a list of countries, whose proxy price level of supply of Cement clinkers to Italy seemed to be a significant factor contributing to the supply growth:

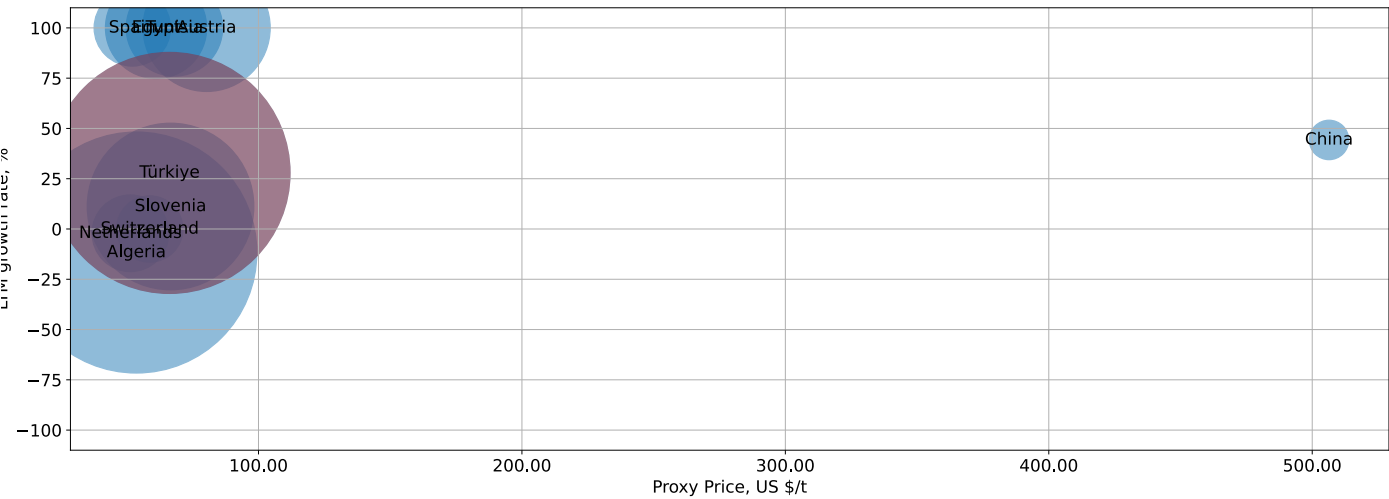
1. Spain;
2. Switzerland;
3. Egypt;

COMPETITION LANDSCAPE: TOP COMPETITORS

This section provides details about the primary exporters of a particular product to a designated country. To present a comprehensive view, a bubble-chart is employed, showcasing a country's position relative to others. It simultaneously utilizes three indicators: the horizontal axis measures the proxy price level provided by suppliers, the vertical axis indicates the market share growth rate, and the size of the bubble denotes the volume of imports from a country-supplier. Countries positioned in the upper-left corner of the chart are considered the most competitive players in the market. The chart includes the most recent data spanning the past 12 months.

Figure 62. Top-10 Supplying Countries to Italy in LTM (June 2024 – May 2025)

Total share of identified TOP-10 supplying countries in Italy's imports in US\$-terms in LTM was 99.6%



The chart shows the classification of countries who are strong competitors in terms of supplies of Cement clinkers to Italy:

- Bubble size depicts market share of each country in total imports of Italy in the period of LTM (June 2024 – May 2025).
- Bubble's position on X axis depicts the average level of proxy price on imports of Cement clinkers to Italy from each country in the period of LTM (June 2024 – May 2025).
- Bubble's position on Y axis depicts growth rate of imports Cement clinkers to Italy from each country (in tons) in the period of LTM (June 2024 – May 2025) compared to the corresponding period a year before.
- Red Bubble represents the country with the largest market share.

COMPETITION LANDSCAPE: TOP COMPETITORS

This section focuses on competition among suppliers and includes a ranking of countries-exporters that are regarded as the most competitive within the last 12 months.

a) In US\$-terms, the largest supplying countries of Cement clinkers to Italy in LTM (06.2024 - 05.2025) were:

- 1. Türkiye (55.65 M US\$, or 47.03% share in total imports);
- 2. Algeria (29.27 M US\$, or 24.74% share in total imports);
- 3. Slovenia (11.26 M US\$, or 9.52% share in total imports);
- 4. Austria (6.56 M US\$, or 5.55% share in total imports);
- 5. Egypt (4.16 M US\$, or 3.52% share in total imports);

b) Countries who increased their imports the most (top-5 contributors to total growth in imports in US \$ terms) during the LTM period (06.2024 - 05.2025) were:

- 1. Türkiye (8.12 M US\$ contribution to growth of imports in LTM);
- 2. Austria (4.46 M US\$ contribution to growth of imports in LTM);
- 3. Tunisia (2.96 M US\$ contribution to growth of imports in LTM);
- 4. Egypt (1.99 M US\$ contribution to growth of imports in LTM);
- 5. Switzerland (1.78 M US\$ contribution to growth of imports in LTM);

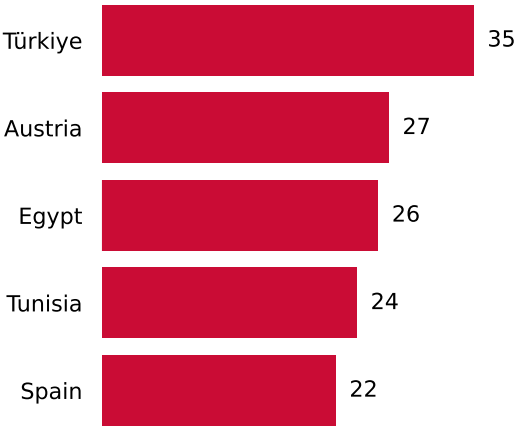
c) Countries whose price level of imports may have been a significant factor of the growth of supply (out of Top-10 contributors to growth of total imports):

- 1. Spain (52 US\$ per ton, 2.0% in total imports, and 174.23% growth in LTM);
- 2. Switzerland (59 US\$ per ton, 1.5% in total imports, and 0.0% growth in LTM);
- 3. Egypt (61 US\$ per ton, 3.52% in total imports, and 91.67% growth in LTM);

d) Top-3 high-ranked competitors in the LTM period:

- 1. Türkiye (55.65 M US\$, or 47.03% share in total imports);
- 2. Austria (6.56 M US\$, or 5.55% share in total imports);
- 3. Egypt (4.16 M US\$, or 3.52% share in total imports);

Figure 63. Ranking of TOP-5 Countries - Competitors



The ranking is a cumulative value of 4 parameters, with the maximum possible score of 40 points. For more information on the methodology, refer to the "Methodology" section.

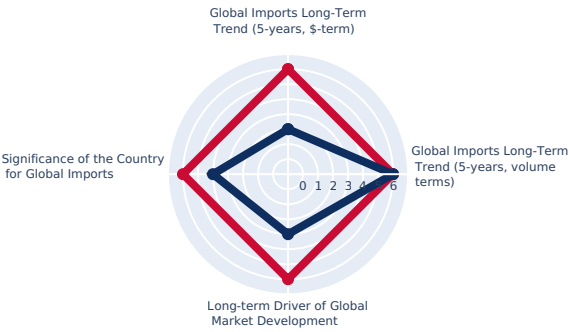
7

CONCLUSIONS

EXPORT POTENTIAL: RANKING RESULTS -1

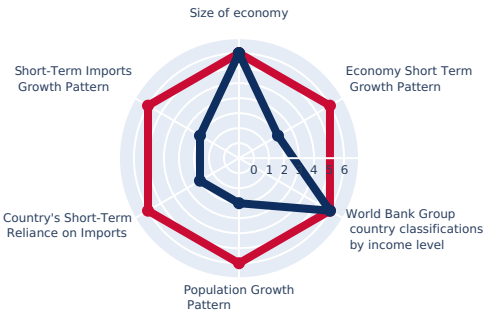
Component 1: Long-term trends of Global Demand for Imports

Max Score: 24
Country Score: 15



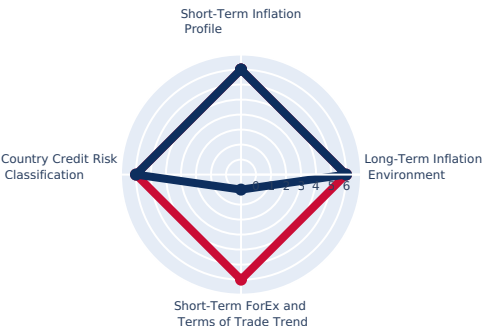
Component 2: Strength of the Demand for Imports in the selected country

Max Score: 36
Country Score: 20



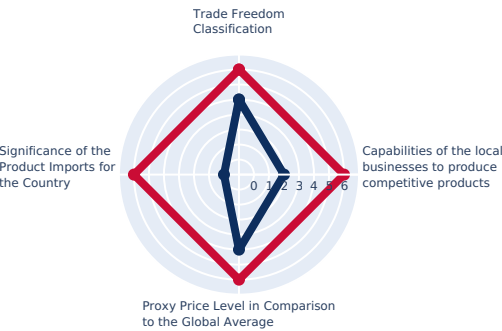
Component 3: Macroeconomic risks for Imports to the selected country

Max Score: 24
Country Score: 18



Component 4: Market entry barriers and domestic competition pressures for imports of the good

Max Score: 24
Country Score: 10

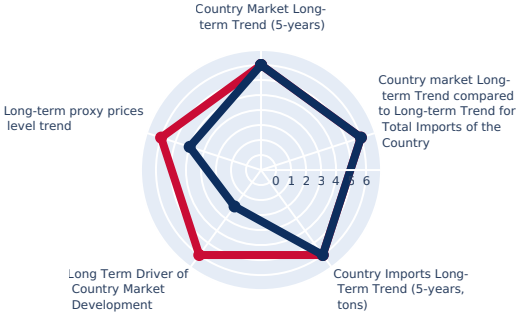


EXPORT POTENTIAL: RANKING RESULTS -2

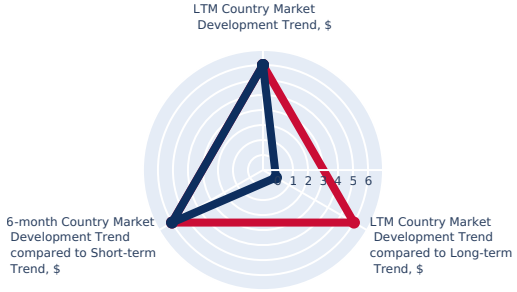
Component 5: Long-term trends of Country Market

Component 6: Short-term trends of Country Market, US\$-terms

Max Score: 30
Country Score: 24



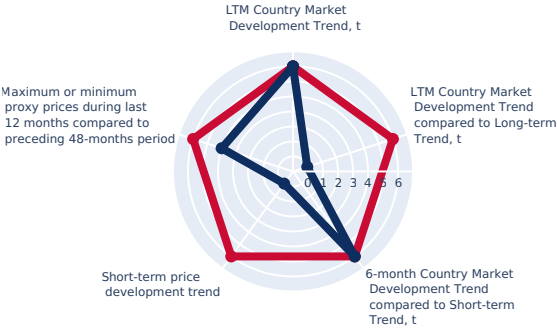
Max Score: 18
Country Score: 12



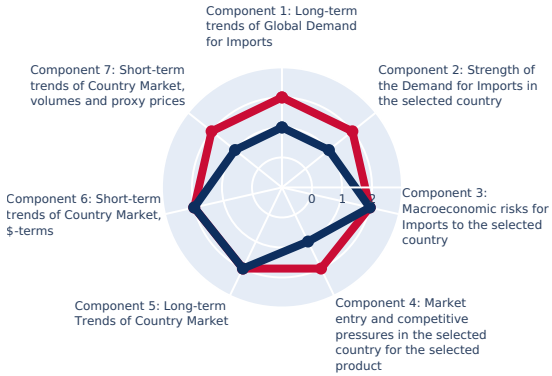
Component 7: Short-term trends of Country Market, volumes and proxy prices

Aggregated Country Ranking

Max Score: 30
Country Score: 16



Max Score: 14
Country Score: 10



Conclusion: Based on this estimation, the entry potential of this product market can be defined as suggesting relatively good chances for successful market entry.

MARKET VOLUME THAT MAY BE CAPTURED BY A NEW SUPPLIER IN MID-TERM

This concluding section provides an assessment of the attractiveness level of the chosen country for suppliers. It also includes estimations of the market volume that suppliers can potentially fill, represented in both US\$ and Ktons.

Conclusion:

Based on recent imports dynamics and high-level analysis of the competition landscape, imports of Cement clinkers by Italy may be expanded to the extent of 529.2 K US\$ monthly, that may be captured by suppliers in a short-term.

This estimation holds possible should any significant competitive advantages have been gained.

A high-level estimation of a share of imports of Cement clinkers by Italy that may be captured by a new supplier or by existing market player in the upcoming short-term period of 6-12 months, includes two major components:

- **Component 1: Potential imports volume supported by Market Growth.** This is a market volume that can be captured by supplier as an effect of the trend related to market growth.
- **Component 2: Expansion of imports due to increase of Competitive Advantages of suppliers.** This is a market volume that can be captured by suppliers with strong competitive advantages, whether price wise or another, more specific and sustainable competitive advantages.

Below is an estimation of supply volumes presented separately for both components. In addition, an integrated component was added to estimate total potential supply of Cement clinkers to Italy.

Estimation of Component 1 of Volume of Potential Supply, which is supported by Market Growth

24-months development trend (volume terms), monthly growth rate	1.4 %
Estimated monthly imports increase in case the trend is preserved	26,385.1 tons
Estimated share that can be captured from imports increase	9.99 %
Potential monthly supply (based on the average level of proxy prices of imports)	165.48 K US\$

Estimation of Component 2 of Volume of Potential Supply, which is supported by Competitive Advantages

The average imports increase in LTM by top-5 contributors to the growth of imports	69,522.37 tons
Estimated monthly imports increase in case of complete advantages	5,793.53 tons
The average level of proxy price on imports of 252310 in Italy in LTM	62.78 US\$/t
Potential monthly supply based on the average level of proxy prices on imports	363.72 K US\$

Integrated Estimation of Volume of Potential Supply

Component 1. Supply supported by Market Growth	Yes	165.48 K US\$
Component 2. Supply supported by Competitive Advantages		363.72 K US\$
Integrated estimation of market volume that may be added each month		529.2 K US\$

Note: Component 2 works only in case there are strong competitive advantages in comparison to the largest competitors and top growing suppliers.

8

LIST OF COMPANIES

LIST OF COMPANIES: DISCLAIMER

This section presents lists of companies generated with the assistance of Google's Gemini AI model. The objective is to help identify potential exporters and buyers of the product under analysis in the country under investigation. These AI-generated insights are designed to complement trade statistics, providing an additional layer of micro-level business intelligence for more informed market entry and partnership decisions.



AI-Generated Content Notice: This list of companies has been generated using Google's Gemini AI model. While we've made efforts to ensure accuracy, the information may contain errors or omissions. We recommend verifying critical details through additional sources before making business decisions based on this data.

Data and Sources:

The company data presented in this section is generated by Google's Gemini AI model based on the product and market parameters provided. The AI analyzes various public sources including company websites, industry reports, business directories, and market databases to identify relevant exporters and buyers. However, this information should be considered as a starting point for further research rather than definitive market intelligence.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

GICA Group (Groupe Industriel des Ciments d'Algérie)

Revenue 1,750,000,000\$

Website: <https://www.gica.dz/>

Country: Algeria

Nature of Business: State-owned integrated cement manufacturer and exporter.

Product Focus & Scale: Largest cement producer in Algeria, with 14 production units. Focuses on cement and clinker, with growing exports to Mediterranean and West African markets, including Italy.

Operations in Importing Country: No direct commercial presence in Italy, but exports are managed through its international trade department, engaging in direct sales to large industrial buyers and trading companies.

Ownership Structure: State-owned enterprise (Algerian government)

COMPANY PROFILE

GICA Group is the largest cement producer in Algeria, a state-owned enterprise that plays a pivotal role in the country's industrial landscape. The group comprises 14 cement production units and 3 aggregates and ready-mix concrete companies, with a total production capacity exceeding 20 million tons of cement annually. GICA's primary mission is to meet Algeria's domestic demand for cement and building materials, but it has increasingly focused on developing its export capabilities to diversify revenue streams and utilize surplus capacity. GICA Group has emerged as a significant exporter of cement and clinker, particularly to markets in the Mediterranean basin and West Africa. Its strategic location on the Algerian coast provides efficient access to international shipping routes. Cement clinker exports are a growing segment for GICA, as it seeks to establish itself as a reliable supplier to European grinding facilities. Italy, given its proximity and demand, is a natural target market for GICA's clinker exports. While GICA Group does not have a direct commercial presence or subsidiary in Italy, its export activities are managed through its dedicated international trade department. The group engages in direct sales to large industrial buyers and trading companies in Italy, leveraging its competitive production costs and high-volume capacity. Its participation in international trade events and direct negotiations with Italian counterparts facilitate its market penetration. GICA Group's annual revenue is estimated to be in the range of 1.5 to 2 billion USD, making it a major economic entity in Algeria. The management board includes Noureddine Boutarfa as the CEO. In the last 12 months, GICA Group has intensified its efforts to boost clinker exports to Europe, including Italy, by optimizing logistics and securing new long-term contracts, aiming to solidify its position as a key supplier in the Mediterranean region.

MANAGEMENT TEAM

- Noureddine Boutarfa (CEO)

RECENT NEWS

GICA Group has significantly increased its focus on clinker exports to European markets, including Italy, over the past year, by streamlining logistics and forging new long-term supply agreements to enhance its regional market share.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

LafargeHolcim Algérie (part of Holcim Group)

Revenue 400,000,000\$

Website: <https://www.lafarge.dz/>

Country: Algeria

Nature of Business: Integrated cement and building materials manufacturer, subsidiary of a global group.

Product Focus & Scale: Produces various types of cement and clinker. Exports surplus clinker to European markets, including Italy, leveraging the global network of Holcim Group.

Operations in Importing Country: Presence in Italy is facilitated through the broader Holcim Group's international trade network and established commercial relationships, with clinker directed to Italian buyers.

Ownership Structure: International (subsidiary of Holcim Group, Switzerland)

COMPANY PROFILE

LafargeHolcim Algérie is a major player in the Algerian cement industry, operating as a subsidiary of the global building materials giant Holcim Group. The company operates several integrated cement plants, grinding stations, and ready-mix concrete facilities across Algeria. LafargeHolcim Algérie combines local expertise with international standards and technology, focusing on sustainable production and innovation in building materials. While primarily serving the domestic market, it also contributes to the group's global export strategy. LafargeHolcim Algérie produces various types of cement and clinker, leveraging its modern facilities and quality control systems. As part of the Holcim Group, it benefits from a vast international network and logistical capabilities. The company has been actively involved in exporting surplus clinker, particularly to European markets, to optimize its production capacity. Italy, being a key market for building materials in Europe, is a natural destination for its clinker exports. LafargeHolcim Algérie's presence in Italy is primarily facilitated through the broader Holcim Group's international trade network and established commercial relationships. While not having a dedicated Algerian subsidiary office in Italy, the global group's extensive operations ensure that clinker from its Algerian plants can be efficiently directed to Italian buyers. Direct sales and supply agreements with Italian industrial clients are managed through the group's regional export hubs. LafargeHolcim Algérie's contribution to Holcim Group's revenue is substantial, with its local operations estimated to generate several hundred million USD annually. The management board includes Nicolas George as the CEO of Holcim Group. In the last 12 months, LafargeHolcim Algérie has focused on enhancing its export efficiency and increasing clinker shipments to European destinations, including Italy, to meet regional demand and optimize its production output within the Holcim global supply chain.

GROUP DESCRIPTION

Holcim Group is a global leader in building materials and solutions, operating in over 70 countries. It provides cement, aggregates, ready-mix concrete, and other construction solutions.

MANAGEMENT TEAM

- Nicolas George (CEO, Holcim Group)

RECENT NEWS

LafargeHolcim Algérie has been optimizing its export logistics and increasing clinker shipments to European markets, including Italy, over the past year, as part of Holcim Group's strategy to balance supply and demand across its global network.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Souakri Group (Ciments de Hadjar Soud)

Revenue 600,000,000\$

Website: <https://www.groupe-souakri.com/>

Country: Algeria

Nature of Business: Private integrated cement manufacturer and exporter, part of a diversified industrial group.

Product Focus & Scale: Produces cement and clinker from its Hadjar Soud plant. Actively exports clinker to regional and international markets, including Italy, leveraging its coastal location.

Operations in Importing Country: No physical office in Italy, but maintains a presence through direct export sales and commercial agreements with Italian trading companies and industrial clients.

Ownership Structure: Local (private Algerian conglomerate)

COMPANY PROFILE

Souakri Group is a prominent Algerian private industrial conglomerate with diverse interests, including a significant presence in the cement sector through its subsidiary Ciments de Hadjar Soud. The group operates a modern integrated cement plant in Hadjar Soud, Skikda, with a substantial production capacity for cement and clinker. Souakri Group is committed to contributing to Algeria's industrial development and expanding its market reach beyond national borders. Ciments de Hadjar Soud, under the Souakri Group, has actively pursued an export strategy for its cement and clinker products. Leveraging its coastal location and modern facilities, the company aims to serve regional and international markets, particularly in the Mediterranean. Cement clinker exports are a key focus, providing raw material to grinding facilities in neighboring countries and Europe. Italy is a target market for its clinker, given its geographical proximity and demand for construction materials. Souakri Group's presence in Italy is established through direct export sales and commercial agreements with Italian trading companies and industrial clients. The group's international sales team manages these relationships, ensuring efficient logistics and adherence to international trade standards. While there is no physical office in Italy, the group's commitment to reliable supply fosters its market penetration. Souakri Group's overall annual revenue is estimated to be in the range of 500-700 million USD, with cement operations contributing a significant portion. The management board includes Mohamed Souakri as the CEO of Souakri Group. In the last 12 months, Souakri Group has focused on increasing its clinker export volumes to European markets, including Italy, by optimizing its production and logistics to meet growing international demand and enhance its competitive position.

GROUP DESCRIPTION

Souakri Group is a private Algerian industrial conglomerate with interests in cement, construction, agriculture, and other sectors.

MANAGEMENT TEAM

- Mohamed Souakri (CEO, Souakri Group)

RECENT NEWS

Souakri Group has been actively working to increase its clinker export volumes to European markets, including Italy, over the past year, by optimizing production and logistics to capitalize on international demand.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Ciments de Ain El Kebira (part of GICA Group)

Revenue 300,000,000\$

Website: <https://www.gica.dz/nos-filiales/ciments-de-ain-el-kebira/>

Country: Algeria

Nature of Business: Integrated cement manufacturer and exporter, subsidiary of a state-owned group.

Product Focus & Scale: Produces high-quality cement and clinker. A key contributor to GICA Group's clinker exports to Mediterranean and West African markets, with Italy being a significant destination.

Operations in Importing Country: No dedicated office in Italy, but its clinker exports are managed through GICA Group's centralized export department, engaging in direct sales and supply contracts with Italian importers.

Ownership Structure: State-owned enterprise (subsidiary of GICA Group, Algeria)

COMPANY PROFILE

Ciments de Ain El Kebira (CAEK) is a major cement production unit located in the wilaya of Sétif, Algeria, and is a key subsidiary of the state-owned GICA Group. CAEK operates a modern integrated cement plant with a substantial production capacity, contributing significantly to Algeria's overall cement output. While its primary role is to supply the domestic market, CAEK, like other GICA subsidiaries, has been instrumental in Algeria's push to become a net exporter of cement and clinker. CAEK produces high-quality cement and clinker, which are increasingly being directed towards international markets. As part of GICA Group's export strategy, CAEK's clinker is exported to various destinations in the Mediterranean region and West Africa. The company's focus on efficiency and quality makes its clinker an attractive raw material for grinding facilities abroad. Italy, due to its geographical proximity and demand for construction materials, is a significant market for CAEK's clinker exports. CAEK's presence in Italy is managed through the centralized export department of GICA Group. The company engages in direct sales and supply contracts with Italian importers and industrial users, ensuring a consistent flow of clinker. While there is no dedicated CAEK office in Italy, the broader GICA Group's efforts in international trade facilitate its market access and relationships with Italian buyers. CAEK's annual revenue is integrated into GICA Group's overall financial reporting, contributing hundreds of millions of USD to the group's turnover. The management is overseen by the GICA Group's executive board, with specific plant management in place. In the last 12 months, CAEK has focused on maximizing its clinker production for export, contributing to GICA Group's increased shipments to European markets, including Italy, to meet regional demand and utilize its full production capacity.

GROUP DESCRIPTION

GICA Group is the largest state-owned cement producer in Algeria, comprising 14 cement production units and other building materials companies.

MANAGEMENT TEAM

- Nouredine Boutarfa (CEO, GICA Group)

RECENT NEWS

Ciments de Ain El Kebira has been instrumental in GICA Group's strategy to boost clinker exports to European markets, including Italy, over the past year, by maximizing its production for international sales.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Ciments de Chlef (part of GICA Group)

Revenue 250,000,000\$

Website: <https://www.gica.dz/nos-filiales/ciments-de-chlef/>

Country: Algeria

Nature of Business: Integrated cement manufacturer and exporter, subsidiary of a state-owned group.

Product Focus & Scale: Produces various types of cement and clinker. Contributes to GICA Group's clinker exports to Mediterranean markets, with Italy being a consistent recipient.

Operations in Importing Country: No physical presence in Italy, but its clinker exports are managed through GICA Group's central export division, establishing direct commercial relationships with Italian buyers.

Ownership Structure: State-owned enterprise (subsidiary of GICA Group, Algeria)

COMPANY PROFILE

Ciments de Chlef (CCLF) is another significant subsidiary of the state-owned GICA Group, located in the Chlef region of Algeria. It operates a large integrated cement plant with substantial production capabilities for various types of cement and clinker. CCLF plays a crucial role in supplying the Algerian domestic market and has been increasingly contributing to the nation's export ambitions in the building materials sector. The plant is known for its modern technology and efficient operations. As part of GICA Group's broader export strategy, Ciments de Chlef actively produces clinker for international markets. Its strategic location, though not directly coastal, benefits from efficient inland logistics to major Algerian ports, facilitating exports to the Mediterranean basin and beyond. CCLF's clinker is sought after by grinding facilities in Europe, with Italy being a consistent recipient due to its proximity and demand for raw materials for its cement industry. Ciments de Chlef's engagement with the Italian market is managed through the GICA Group's central export division. The company establishes direct commercial relationships and supply agreements with Italian industrial buyers and trading firms. While CCLF does not maintain a physical presence in Italy, its commitment to reliable supply and competitive pricing, backed by GICA's logistical network, ensures its clinker reaches Italian ports effectively. Ciments de Chlef's financial performance is consolidated within the GICA Group's overall reporting, contributing hundreds of millions of USD to the group's annual turnover. The management is part of the GICA Group's executive structure. In the last 12 months, Ciments de Chlef has focused on optimizing its clinker production and internal logistics to support GICA Group's increased export volumes to European markets, including Italy, aiming to strengthen Algeria's position as a regional clinker supplier.

GROUP DESCRIPTION

GICA Group is the largest state-owned cement producer in Algeria, comprising 14 cement production units and other building materials companies.

MANAGEMENT TEAM

- Nouredine Boutarfa (CEO, GICA Group)

RECENT NEWS

Ciments de Chlef has been optimizing its clinker production and internal logistics to support GICA Group's increased export volumes to European markets, including Italy, over the past year, enhancing Algeria's regional supply capabilities.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Ciments de Zahana (part of GICA Group)

Revenue 200,000,000\$

Website: <https://www.gica.dz/nos-filiales/ciments-de-zahana/>

Country: Algeria

Nature of Business: Integrated cement manufacturer and exporter, subsidiary of a state-owned group.

Product Focus & Scale: Produces various types of cement and clinker. Contributes to GICA Group's clinker exports to Mediterranean and West African markets, with Italy being a regular recipient.

Operations in Importing Country: No dedicated office in Italy, but its clinker exports are managed through GICA Group's centralized export department, establishing direct commercial relationships with Italian importers.

Ownership Structure: State-owned enterprise (subsidiary of GICA Group, Algeria)

COMPANY PROFILE

Ciments de Zahana (SCIZ) is one of the historical and significant cement production units within the state-owned GICA Group in Algeria. Located in the Zahana region, it operates an integrated cement plant with substantial capacity for producing cement and clinker. SCIZ has a long-standing history in the Algerian cement industry and is a key contributor to meeting national demand, while also participating in the country's growing export initiatives. SCIZ produces various types of cement and clinker, which are increasingly being directed towards international markets as part of GICA Group's export drive. Its clinker is exported to destinations in the Mediterranean basin and West Africa, leveraging Algeria's strategic geographical position. Italy, with its demand for raw materials for its construction sector, is a regular recipient of SCIZ's clinker, contributing to the supply chain of Italian grinding facilities. Ciments de Zahana's engagement with the Italian market is facilitated through the centralized export department of GICA Group. The company establishes direct commercial relationships and supply agreements with Italian importers and industrial users. While SCIZ does not maintain a dedicated office in Italy, the broader GICA Group's efforts in international trade ensure its market access and relationships with Italian buyers are effectively managed. Ciments de Zahana's financial performance is integrated into GICA Group's overall reporting, contributing hundreds of millions of USD to the group's annual turnover. The management is part of the GICA Group's executive structure. In the last 12 months, SCIZ has focused on optimizing its clinker production for export, contributing to GICA Group's increased shipments to European markets, including Italy, to meet regional demand and utilize its full production capacity.

GROUP DESCRIPTION

GICA Group is the largest state-owned cement producer in Algeria, comprising 14 cement production units and other building materials companies.

MANAGEMENT TEAM

- Nouredine Boutarfa (CEO, GICA Group)

RECENT NEWS

Ciments de Zahana has been optimizing its clinker production for export, contributing to GICA Group's increased shipments to European markets, including Italy, over the past year, to meet regional demand and maximize capacity utilization.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Salonit Anhovo d.d.

Revenue 175,000,000\$

Website: <https://www.salonit.si/>

Country: Slovenia

Nature of Business: Integrated cement manufacturer and exporter.

Product Focus & Scale: Sole cement producer in Slovenia, producing various types of cement and clinker. Key exporter of clinker to Central, Southeastern Europe, and the Mediterranean, with Italy being a significant market.

Operations in Importing Country: No physical office in Italy, but maintains a strong commercial presence through direct sales and long-term supply agreements with Italian cement manufacturers and distributors, leveraging its geographical proximity.

Ownership Structure: Local (private Slovenian company)

COMPANY PROFILE

Salonit Anhovo is the sole cement producer in Slovenia, with a long-standing tradition dating back to 1921. The company operates an integrated cement plant in Anhovo, producing various types of cement and clinker. Salonit Anhovo is committed to sustainable production, investing in modern technologies to reduce its environmental footprint while maintaining high-quality standards. It plays a crucial role in supplying the Slovenian construction market and is a significant exporter in the Adriatic region. Salonit Anhovo is a key exporter of cement and clinker, primarily serving markets in Central and Southeastern Europe, as well as the Mediterranean. Its strategic location near the Italian border and access to efficient transport networks facilitate its export operations. Cement clinker constitutes a substantial portion of its export volume, supplying grinding facilities and cement producers in neighboring countries. Italy is a natural and important export market for Salonit Anhovo's clinker due to geographical proximity and established trade routes. Salonit Anhovo maintains a strong commercial presence in Italy through direct sales and long-term supply agreements with Italian cement manufacturers and building material distributors. While it does not have a physical office in Italy, its proximity allows for direct engagement and efficient logistics. The company's sales and logistics teams work closely with Italian partners to ensure timely and reliable delivery of clinker. Salonit Anhovo reported an annual revenue of approximately 150-200 million USD in 2023. The management board includes Julijan Fortunat as the CEO. In the last 12 months, Salonit Anhovo has focused on optimizing its production processes and logistics to enhance its competitiveness in export markets, particularly in Italy and the Adriatic region, ensuring a stable supply of clinker amidst regional demand fluctuations.

MANAGEMENT TEAM

- Julijan Fortunat (CEO)

RECENT NEWS

Salonit Anhovo has been optimizing its production and logistics to enhance its competitiveness in export markets, particularly Italy and the Adriatic region, ensuring a stable supply of clinker.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Cemex Slovenia (part of Cemex Group)

Revenue 80,000,000\$

Website: <https://www.cemex.si/>

Country: Slovenia

Nature of Business: Cement and ready-mix concrete producer (grinding plant), and building materials trader, subsidiary of a global group.

Product Focus & Scale: Primarily produces cement and ready-mix concrete. Acts as an importer and distributor of clinker within the region, potentially facilitating clinker flows to Italy as part of Cemex Group's European network.

Operations in Importing Country: Indirect presence in Italy through the broader Cemex Group's established network, which includes sales offices and distribution channels, potentially facilitating clinker for Italian grinding plants.

Ownership Structure: International (subsidiary of Cemex Group, Mexico)

COMPANY PROFILE

Cemex Slovenia is a subsidiary of Cemex, a global building materials company headquartered in Mexico. While Cemex Slovenia primarily focuses on cement and ready-mix concrete production for the domestic and regional markets, its operations are integrated into Cemex's broader European network. The company operates a grinding plant in Slovenia, sourcing clinker from various Cemex facilities or external suppliers, and also engages in trade of building materials. Cemex Slovenia, as part of the global Cemex network, participates in the regional trade of cement and clinker. While it does not produce clinker itself in Slovenia, it acts as a significant importer and potentially re-exporter or distributor of clinker within the region. Its role in the supply chain involves optimizing the flow of materials to meet market demand. Given its strategic location, it can facilitate the movement of clinker from other Cemex operations or third-party suppliers to markets like Italy. Cemex has a significant presence in Italy through its various operations and commercial activities. Cemex Slovenia's indirect presence in Italy is through the broader Cemex Group's established network, which includes sales offices and distribution channels. While Cemex Slovenia itself might not directly export clinker to Italy, it is part of a larger system that manages clinker flows across Europe, potentially sourcing or facilitating clinker for Italian grinding plants from other Cemex sources or trading partners. Cemex Slovenia's revenue is integrated into Cemex Group's overall financial reporting, with its local operations contributing tens of millions of USD annually. The management board includes Fernando A. Gonzalez as the CEO of Cemex. In the last 12 months, Cemex Group has focused on optimizing its European supply chain for clinker and cement, which indirectly impacts Cemex Slovenia's role in facilitating material flows to neighboring markets like Italy, ensuring efficient resource allocation.

GROUP DESCRIPTION

Cemex is a global building materials company that provides high-quality products and reliable services to customers and communities in more than 50 countries.

MANAGEMENT TEAM

- Fernando A. Gonzalez (CEO, Cemex)

RECENT NEWS

Cemex Group has been optimizing its European supply chain for clinker and cement, which indirectly influences Cemex Slovenia's role in facilitating material flows to neighboring markets like Italy, ensuring efficient resource allocation.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Lafarge Cement d.o.o. (part of Holcim Group)

Revenue 60,000,000\$

Website: <https://www.holcim.si/>

Country: Slovenia

Nature of Business: Cement grinding, ready-mix concrete, and aggregates producer, and building materials trader, subsidiary of a global group.

Product Focus & Scale: Primarily produces cement, ready-mix concrete, and aggregates. Acts as a hub for material flows, potentially facilitating the movement of clinker from other Holcim operations or third-party suppliers to markets like Italy.

Operations in Importing Country: Indirect connection to the Italian market through the broader Holcim Group's extensive network, which manages the sourcing and distribution of clinker and cement across Europe.

Ownership Structure: International (subsidiary of Holcim Group, Switzerland)

COMPANY PROFILE

Lafarge Cement d.o.o. in Slovenia is a subsidiary of the global building materials leader Holcim Group. While the company's main cement plant in Trbovlje was decommissioned, Lafarge Cement d.o.o. continues to operate as a significant player in the Slovenian market, primarily focusing on cement grinding, ready-mix concrete, and aggregates. It sources clinker from other Holcim plants or external suppliers, leveraging the group's extensive supply chain network. As part of the Holcim Group, Lafarge Cement d.o.o. in Slovenia plays a role in the regional distribution and trade of building materials, including clinker. While it does not produce clinker, its strategic position and logistical capabilities allow it to be a hub for material flows. It can act as an intermediary or a point of transit for clinker destined for other European markets, including Italy, drawing from Holcim's broader supply network. Holcim Group has a substantial presence in Italy through its various subsidiaries and commercial operations. Lafarge Cement d.o.o.'s indirect connection to the Italian market is through this extensive Holcim network, which manages the sourcing and distribution of clinker and cement across Europe. While not directly exporting clinker from Slovenia to Italy, it is part of the integrated supply chain that ensures clinker availability for Italian grinding plants from various Holcim sources. Lafarge Cement d.o.o.'s revenue is integrated into Holcim Group's overall financial reporting, with its local operations contributing tens of millions of USD annually. The management board includes Nicolas George as the CEO of Holcim Group. In the last 12 months, Holcim Group has focused on optimizing its European supply chain for clinker and cement, which indirectly impacts Lafarge Cement d.o.o.'s role in facilitating material flows to neighboring markets like Italy, ensuring efficient resource allocation.

GROUP DESCRIPTION

Holcim Group is a global leader in building materials and solutions, operating in over 70 countries. It provides cement, aggregates, ready-mix concrete, and other construction solutions.

MANAGEMENT TEAM

- Nicolas George (CEO, Holcim Group)

RECENT NEWS

Holcim Group has been optimizing its European supply chain for clinker and cement, which indirectly influences Lafarge Cement d.o.o.'s role in facilitating material flows to neighboring markets like Italy, ensuring efficient resource allocation.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Triglav Cement d.o.o.

Revenue 30,000,000\$

Website: <https://www.triglavcement.si/>

Country: Slovenia

Nature of Business: Trading company for cement and building materials.

Product Focus & Scale: Trades various types of cement and clinker, sourcing from regional producers. Facilitates the movement of clinker from Central/Eastern Europe to Western European markets, with Italy as a potential destination.

Operations in Importing Country: No physical office in Italy, but engages in trading activities with Italian buyers and distributors for cement and clinker, establishing commercial relationships for cross-border trade.

Ownership Structure: Local (private Slovenian company)

COMPANY PROFILE

Triglav Cement d.o.o. is a Slovenian company primarily engaged in the trade and distribution of cement and other building materials. While not a producer of clinker itself, the company plays a role in the supply chain by importing and distributing cement and clinker within Slovenia and to neighboring countries. It leverages its logistical capabilities and market knowledge to serve various construction projects and industrial clients. Triglav Cement acts as a trading company for cement and clinker, sourcing materials from various producers in the region and beyond. Its product focus includes different types of cement and clinker, which it supplies to meet specific market demands. Given Slovenia's strategic location, Triglav Cement can facilitate the movement of clinker from Central and Eastern European suppliers to Western European markets. Italy, as a major consumer of building materials, is a potential destination for clinker traded by Triglav Cement. Triglav Cement's presence in Italy is primarily through its trading activities, engaging with Italian buyers and distributors for cement and clinker. While it does not have a physical office in Italy, its business model involves cross-border trade and logistics, establishing commercial relationships with partners in the Italian market. Its focus is on efficient sourcing and delivery to meet customer requirements. Triglav Cement d.o.o. is a privately held company, and its annual revenue is estimated to be in the range of 20-40 million USD. The management board includes Matjaž Zupančič as the CEO. In the last 12 months, Triglav Cement has focused on expanding its network of suppliers and optimizing its logistics to enhance its trading capabilities for cement and clinker in the Adriatic region, including potential shipments to Italy, to capitalize on market opportunities.

MANAGEMENT TEAM

- Matjaž Zupančič (CEO)

RECENT NEWS

Triglav Cement has been expanding its supplier network and optimizing logistics to enhance its trading capabilities for cement and clinker in the Adriatic region, including potential shipments to Italy, over the past year.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Kamen d.d.

Revenue 60,000,000\$

Website: <https://www.kamen.si/>

Country: Slovenia

Nature of Business: Producer of aggregates and asphalt, and trader of building materials.

Product Focus & Scale: Primarily aggregates and asphalt. Also trades in other building materials, including potentially sourcing and distributing cement and clinker for its projects or clients, with regional trade capabilities including Italy.

Operations in Importing Country: No dedicated clinker export operation to Italy, but its role in the regional construction supply chain means it could be involved in the movement of clinker, either as a buyer for its own needs or as a distributor, leveraging its proximity to Italy.

Ownership Structure: Local (private Slovenian company)

COMPANY PROFILE

Kamen d.d. is a Slovenian company primarily involved in the production of aggregates and asphalt, and also engages in the trade of building materials. While its core business is not cement or clinker production, its extensive network in the construction sector and logistical capabilities position it as a potential player in the broader building materials supply chain, including the sourcing and distribution of clinker for its own projects or for resale. Kamen d.d. focuses on aggregates and asphalt production, but as a comprehensive building materials supplier, it also trades in other essential construction inputs. This can include sourcing cement and clinker to meet the demands of its construction projects or for distribution to its client base. Its strategic location in Slovenia allows for efficient logistics and trade with neighboring countries. While not a primary clinker exporter, it can act as an intermediary or a significant buyer that might re-distribute clinker. Kamen d.d.'s engagement with the Italian market is primarily through its general building materials trade, where it may source or supply materials across the border. While it does not have a dedicated clinker export operation to Italy, its role in the regional construction supply chain means it could be involved in the movement of clinker, either as a buyer for its own needs or as a distributor. Its proximity to Italy facilitates such cross-border transactions. Kamen d.d. is a privately held company, and its annual revenue is estimated to be in the range of 50-70 million USD. The management board includes Jože Šmid as the CEO. In the last 12 months, Kamen d.d. has focused on optimizing its supply chain for various building materials to support its construction projects and trading activities in the region, which could include the sourcing and movement of clinker to or from neighboring markets like Italy.

MANAGEMENT TEAM

- Jože Šmid (CEO)

RECENT NEWS

Kamen d.d. has been optimizing its supply chain for various building materials to support its construction projects and trading activities in the region, which could involve the sourcing and movement of clinker to or from neighboring markets like Italy.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Gorenjska gradbena družba d.d. (GGD)

Revenue 125,000,000\$

Website: <https://www.ggd.si/>

Country: Slovenia

Nature of Business: Large construction company, producer of aggregates and asphalt, and trader of building materials.

Product Focus & Scale: Primarily construction services, aggregates, and asphalt. As a major consumer of cement, it is a significant buyer of cement and clinker for its own projects and concrete production facilities, potentially importing clinker.

Operations in Importing Country: Not a direct exporter of clinker to Italy, but a large-scale construction company that might engage in cross-border procurement of building materials, potentially as a direct importer of clinker for its own needs, leveraging its proximity to Italy.

Ownership Structure: Local (private Slovenian company)

COMPANY PROFILE

Gorenjska gradbena družba d.d. (GGD) is one of the largest construction companies in Slovenia, with a long history of executing complex infrastructure and building projects. While primarily a construction contractor, GGD also operates its own quarries and asphalt plants, and engages in the trade of building materials to support its extensive operations. Its integrated approach to construction often involves direct sourcing of key raw materials. GGD's product focus is primarily on construction services, aggregates, and asphalt. However, as a major consumer of cement and concrete, the company is a significant buyer of cement and clinker. It sources these materials from various suppliers to ensure a steady supply for its numerous projects. Given its scale and involvement in large-scale infrastructure, GGD's procurement activities can include importing clinker for its own use or for its concrete production facilities. Its proximity to Italy makes cross-border sourcing efficient. GGD's presence in Italy is not as a direct exporter of clinker, but rather as a large-scale construction company that might engage in cross-border procurement of building materials. It could be a direct importer of clinker for its own needs or for its concrete plants, leveraging its extensive supply chain network. While it does not have an office in Italy, its operational needs often lead to direct engagement with suppliers in neighboring countries. Gorenjska gradbena družba d.d. is a privately held company, and its annual revenue is estimated to be in the range of 100-150 million USD. The management board includes Robert Pistotnik as the CEO. In the last 12 months, GGD has focused on optimizing its supply chain for major construction projects, which includes efficient sourcing of raw materials like clinker from regional suppliers, potentially including imports from neighboring countries like Italy's suppliers or for its own use from Slovenian suppliers.

MANAGEMENT TEAM

- Robert Pistotnik (CEO)

RECENT NEWS

GGD has been optimizing its supply chain for major construction projects, which includes efficient sourcing of raw materials like clinker from regional suppliers, potentially involving imports from neighboring countries or for its own use.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Oyak Cement Group

Turnover 1,500,000,000\$

Website: <https://www.oyakcimento.com/>

Country: Türkiye

Nature of Business: Integrated cement manufacturer and exporter

Product Focus & Scale: Primary focus on cement, clinker, and ready-mix concrete. Exports significant volumes of cement clinker to Europe, Africa, and the Middle East, making it Türkiye's largest exporter in the sector.

Operations in Importing Country: No direct office or subsidiary in Italy, but maintains a strong presence through long-term supply contracts and established logistics channels with Italian importers and grinding facilities.

Ownership Structure: Local (subsidiary of Oyak Group, a Turkish Armed Forces Pension Fund company)

COMPANY PROFILE

Oyak Cement Group is Türkiye's largest cement producer, operating seven integrated cement plants and two grinding facilities across the country. The group is a subsidiary of Oyak, the Turkish Armed Forces Pension Fund, a diversified conglomerate with significant holdings in various sectors. Oyak Cement focuses on the production of cement, clinker, and ready-mix concrete, serving both domestic and international markets. Its extensive production capacity and strategic geographical location make it a dominant player in the regional cement trade. The group's export strategy is robust, leveraging its coastal facilities to access European, African, and Middle Eastern markets. Cement clinker constitutes a significant portion of its export volume, driven by demand from grinding stations in importing countries. Oyak Cement has consistently been among the top exporters from Türkiye, with a strong focus on maintaining its market share in key European destinations, including Italy, where its clinker is used by various grinding facilities. While Oyak Cement does not maintain a direct subsidiary or office in Italy, its presence is established through long-term supply contracts and established logistics channels with Italian importers and cement producers. The company's commitment to quality and consistent supply has fostered enduring relationships within the Italian construction materials sector. Its export operations are managed centrally from Türkiye, coordinating shipments through major Turkish ports. Oyak Cement Group reported a consolidated turnover of approximately 1.5 billion USD in 2023. The management board includes Süleyman Savaş Erdem as the General Manager of Oyak Group, overseeing the cement operations. In the last 12 months, Oyak Cement has continued to optimize its logistics for European exports, including increased vessel chartering to meet demand from Mediterranean markets, reinforcing its supply chain to countries like Italy amidst fluctuating energy costs.

GROUP DESCRIPTION

Oyak Group is a diversified Turkish conglomerate with interests in mining, metallurgy, cement, automotive, finance, and logistics. It is one of the largest industrial groups in Türkiye.

MANAGEMENT TEAM

- Süleyman Savaş Erdem (General Manager, Oyak Group)

RECENT NEWS

In the last 12 months, Oyak Cement has focused on optimizing its logistics and increasing vessel chartering to enhance its export capabilities to European markets, including Italy, to meet sustained demand for clinker and cement.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Çimsa Çimento Sanayi ve Ticaret A.Ş.

Revenue 750,000,000\$

Website: <https://www.cimsa.com.tr/>

Country: Türkiye

Nature of Business: Integrated cement and building materials manufacturer, specializing in white cement and clinker.

Product Focus & Scale: Produces ordinary Portland cement, white cement, and clinker. A major global exporter of white cement and clinker, serving over 60 countries, with significant volumes directed to European markets including Italy.

Operations in Importing Country: No direct office in Italy, but maintains a strong commercial presence through distributors and direct sales to industrial customers, with established trade relationships.

Ownership Structure: Local (subsidiary of Sabancı Holding, a Turkish conglomerate)

COMPANY PROFILE

Çimsa is a leading Turkish cement and building materials company, part of the Sabancı Holding conglomerate. Established in 1972, Çimsa operates five integrated cement plants and a grinding facility in Türkiye, along with a white cement plant in Spain and a grinding facility in Houston, USA. The company is renowned for its high-quality white cement and special products, alongside ordinary Portland cement and clinker. Çimsa's strategic focus includes expanding its international footprint and optimizing its export operations. Çimsa is a significant exporter of cement clinker, particularly its high-quality white clinker, to a global market spanning over 60 countries. Its export strategy leverages its advanced production capabilities and strategic port access. The company actively supplies clinker to various European markets, including Italy, where its products are valued for their consistency and performance in specialized applications and general construction. While Çimsa does not have a physical office in Italy, its export activities are well-established through a network of distributors and direct sales to industrial customers. The company participates in international trade fairs and maintains strong commercial relationships with Italian buyers, ensuring a steady flow of its clinker into the Italian market. Its global sales team manages these international engagements. Çimsa reported a consolidated revenue of approximately 750 million USD in 2023. The company's management includes Umut Zenar as the General Manager. In the past year, Çimsa has focused on enhancing its global supply chain resilience and expanding its white cement and clinker export volumes, particularly to key European and American markets, which indirectly benefits its Italian market presence through increased availability and competitive pricing.

GROUP DESCRIPTION

Sabancı Holding is one of the largest industrial and financial conglomerates in Türkiye, with interests in banking, insurance, energy, cement, retail, and automotive sectors.

MANAGEMENT TEAM

- Umut Zenar (General Manager)

RECENT NEWS

Çimsa has been actively working on strengthening its global supply chain and increasing its export volumes for white cement and clinker, particularly targeting European and American markets, which supports its consistent supply to Italy.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Akçansa Çimento Sanayi ve Ticaret A.Ş.

Revenue 600,000,000\$

Website: <https://www.akcansa.com.tr/>

Country: Türkiye

Nature of Business: Integrated cement and ready-mix concrete manufacturer and exporter.

Product Focus & Scale: Produces various types of cement and clinker. A significant exporter of clinker to Mediterranean and Black Sea regions, with Italy being a key market.

Operations in Importing Country: No direct operational presence in Italy, but exports are facilitated through direct sales and long-term contracts with Italian buyers, supported by its international partner HeidelbergCement's network.

Ownership Structure: Joint venture (50% Sabancı Holding, 50% HeidelbergCement AG)

COMPANY PROFILE

Akçansa is a prominent Turkish cement and ready-mix concrete producer, established as a joint venture between Sabancı Holding and HeidelbergCement AG. The company operates three integrated cement plants and two grinding facilities in Türkiye, strategically located to serve both domestic and international markets. Akçansa is a key supplier of various types of cement and clinker, known for its commitment to sustainable production and high-quality standards. Akçansa is a significant exporter of cement clinker, leveraging its coastal facilities to efficiently serve Mediterranean and Black Sea markets. Its export portfolio includes various clinker types, catering to the specific needs of grinding plants in importing countries. Italy is a consistent destination for Akçansa's clinker, driven by its competitive pricing and reliable supply chain, supporting Italian cement producers and construction material suppliers. While Akçansa does not have a direct operational presence in Italy, its strong ties with its international partner, HeidelbergCement, facilitate its export activities into European markets. The company engages in direct sales and long-term contracts with Italian buyers, ensuring its clinker reaches the target market effectively. Its export department manages these international trade relationships. Akçansa reported a consolidated revenue of approximately 600 million USD in 2023. The company's management includes Vecih Yılmaz as the General Manager. In the last 12 months, Akçansa has focused on optimizing its production efficiency and logistics to maintain its competitive edge in export markets, including Italy, amidst global supply chain challenges and energy price volatility, ensuring consistent clinker supply.

GROUP DESCRIPTION

Akçansa is a joint venture between Sabancı Holding (a major Turkish conglomerate) and HeidelbergCement AG (a global leader in building materials).

MANAGEMENT TEAM

- Vecih Yılmaz (General Manager)

RECENT NEWS

Akçansa has been concentrating on enhancing production efficiency and optimizing logistics to sustain its competitive position in export markets, including Italy, ensuring a stable supply of clinker despite global economic fluctuations.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Limak Cement Group

Revenue 500,000,000\$

Website: <https://www.limakcimento.com.tr/>

Country: Türkiye

Nature of Business: Integrated cement manufacturer and exporter.

Product Focus & Scale: Produces various types of cement and clinker from 13 plants. A significant exporter of clinker to Europe, Africa, and the Middle East, with Italy being a key destination.

Operations in Importing Country: No direct office in Italy, but maintains a presence through direct engagement with Italian importers and industrial clients via its international sales department.

Ownership Structure: Local (subsidiary of Limak Holding, a Turkish conglomerate)

COMPANY PROFILE

Limak Cement Group is one of Türkiye's leading cement producers, operating 13 cement plants (11 integrated, 2 grinding) across Türkiye and one integrated plant in Mozambique. Part of the larger Limak Holding conglomerate, the group has a significant production capacity for cement and clinker. Limak Cement is committed to sustainable production practices and aims to be a major player in both domestic and international markets, leveraging its extensive network and logistical capabilities. Limak Cement is a substantial exporter of cement clinker, utilizing its strategically located plants and port access to serve a wide range of international markets, including Europe, Africa, and the Middle East. The company's clinker exports are a key component of its international sales strategy, providing essential raw material to grinding facilities in various countries. Italy represents an important market for Limak's clinker, contributing to the supply chain of Italian cement and construction material producers. While Limak Cement does not have a dedicated office or subsidiary in Italy, its export operations are managed through its international sales department, which engages directly with Italian importers and industrial clients. The company's reputation for reliable supply and competitive pricing has helped it establish a consistent presence in the Italian market. Its logistical network ensures efficient delivery to Italian ports. Limak Cement Group's estimated annual revenue is approximately 500 million USD. The management board includes Ersin Emre Kütük as the CEO of Limak Cement. In the last 12 months, Limak Cement has focused on expanding its export reach and optimizing its shipping routes to European destinations, including Italy, to capitalize on market demand and enhance its competitive position in the clinker trade.

GROUP DESCRIPTION

Limak Holding is a diversified Turkish conglomerate with interests in construction, cement, energy, tourism, infrastructure, and aviation.

MANAGEMENT TEAM

- Ersin Emre Kütük (CEO, Limak Cement)

RECENT NEWS

Limak Cement has been actively working on expanding its export markets and optimizing shipping logistics to European countries, including Italy, to meet demand for clinker and strengthen its market presence.

POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

Medcem Global

Revenue 350,000,000\$

Website: <https://www.medcemglobal.com/>

Country: Türkiye

Nature of Business: Integrated cement manufacturer and exporter, operating as the international sales arm of Eren Holding's cement division.

Product Focus & Scale: Specializes in the production and export of high-quality cement and clinker from its Mersin plant. A major supplier to Mediterranean, European, and African markets, with significant clinker volumes going to Italy.

Operations in Importing Country: No physical office in Italy, but maintains a strong presence through direct export sales and established relationships with major Italian importers and industrial users.

Ownership Structure: Local (subsidiary of Eren Holding, a Turkish conglomerate)

COMPANY PROFILE

Medcem Global is the international sales and marketing arm of Eren Holding's cement operations in Türkiye. Eren Holding is a diversified Turkish conglomerate with significant investments in energy, paper, packaging, and cement. Medcem operates a state-of-the-art integrated cement plant in Mersin, Türkiye, which is strategically located on the Mediterranean coast, providing excellent access to international shipping routes. The company is focused on producing high-quality cement and clinker for global markets. Medcem Global specializes in the export of cement and clinker, leveraging its modern production facilities and efficient logistics. The Mersin plant has a substantial clinker production capacity, making Medcem a key supplier to various international markets, particularly in the Mediterranean basin, Europe, and Africa. Italy is a significant market for Medcem's clinker, where it supplies grinding facilities and cement producers seeking reliable and high-volume imports. Medcem Global's presence in Italy is primarily through direct export sales and established relationships with major Italian importers and industrial users. The company's export team actively manages these relationships, ensuring timely delivery and adherence to international trade standards. While there is no physical office in Italy, Medcem's strong logistical network and customer-centric approach ensure effective market penetration. Medcem Global's cement operations contribute significantly to Eren Holding's overall revenue, with estimated annual cement-related revenue in the range of 300-400 million USD. The management board includes Mehmet Eren as the Chairman of Eren Holding. In the last 12 months, Medcem Global has focused on increasing its export volumes to European markets, including Italy, by optimizing its shipping schedules and expanding its customer base, capitalizing on its competitive production costs and strategic location.

GROUP DESCRIPTION

Eren Holding is a diversified Turkish conglomerate with interests in energy, paper, packaging, cement, retail, and textiles.

MANAGEMENT TEAM

- Mehmet Eren (Chairman, Eren Holding)

RECENT NEWS

Medcem Global has been actively working to increase its export volumes of clinker to European markets, including Italy, by optimizing shipping logistics and expanding its customer portfolio, leveraging its strategic coastal location.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Buzzi Unicem S.p.A.

Revenue 4,300,000,000\$

Integrated cement manufacturer

Website: <https://www.buzziunicem.com/>

Country: Italy

Product Usage: Processing into various types of cement for sale to the construction industry (residential, commercial, infrastructure).

Ownership Structure: Publicly traded (listed on Milan Stock Exchange), controlled by the Buzzi family.

COMPANY PROFILE

Buzzi Unicem S.p.A. is one of Italy's largest and most prominent cement manufacturers, with a significant international presence. Headquartered in Casale Monferrato, the company operates numerous cement plants and grinding facilities across Italy, Europe, and the Americas. Buzzi Unicem is a vertically integrated producer of cement, ready-mix concrete, and aggregates, known for its commitment to innovation, sustainability, and high-quality products. It is a publicly traded company listed on the Milan Stock Exchange. As a major integrated cement producer, Buzzi Unicem utilizes cement clinker as the primary raw material for its grinding operations. The company imports clinker to supplement its own production, especially at grinding-only facilities or to optimize logistics and cost-efficiency across its extensive network. The imported clinker is processed into various types of cement for sale to the construction industry, including residential, commercial, and infrastructure projects across Italy and its export markets. Buzzi Unicem reported a consolidated revenue of approximately 4.3 billion USD in 2023. The company is managed by a board of directors, with Pietro Buzzi and Michele Buzzi serving as Co-CEOs. In the last 12 months, Buzzi Unicem has continued to focus on optimizing its production footprint and supply chain, including strategic clinker sourcing to ensure efficient operations and meet market demand, particularly in light of energy cost fluctuations and sustainability goals.

MANAGEMENT TEAM

- Pietro Buzzi (Co-CEO)
- Michele Buzzi (Co-CEO)

RECENT NEWS

Buzzi Unicem has focused on optimizing its production footprint and supply chain, including strategic clinker sourcing, to ensure efficient operations and meet market demand amidst energy cost fluctuations and sustainability goals.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Italcementi S.p.A. (part of HeidelbergCement Group)

Revenue 1,200,000,000\$

Integrated cement manufacturer

Website: <https://www.italcementi.it/>

Country: Italy

Product Usage: Processing into various types of cement for the Italian construction market, supplementing its own clinker production.

Ownership Structure: International (wholly-owned subsidiary of HeidelbergCement Group, Germany)

COMPANY PROFILE

Italcementi S.p.A. is one of Italy's oldest and most significant cement producers, now a wholly-owned subsidiary of HeidelbergCement Group, a global leader in building materials. Italcementi operates several integrated cement plants and grinding facilities throughout Italy, producing a wide range of cements, ready-mix concrete, and aggregates. The company is known for its strong brand, extensive distribution network, and commitment to sustainable construction solutions. As a major cement manufacturer within a global group, Italcementi imports cement clinker to supply its grinding plants, especially those not integrated with clinker production or to balance regional supply and demand. This imported clinker is a critical raw material, which is then ground and blended to produce various types of cement tailored for the Italian construction market. The clinker ensures consistent product quality and efficient operations across its Italian facilities. Italcementi reported a revenue of approximately 1.2 billion USD in 2023. The company's management is integrated into the HeidelbergCement Group structure, with Roberto Callieri serving as the CEO of Italcementi. In the last 12 months, Italcementi has continued to invest in modernizing its plants and optimizing its supply chain, including strategic clinker procurement, to enhance efficiency and reduce its carbon footprint, aligning with HeidelbergCement's global sustainability targets.

GROUP DESCRIPTION

HeidelbergCement Group is one of the world's largest integrated manufacturers of building materials, with leading market positions in cement, aggregates, and ready-mix concrete.

MANAGEMENT TEAM

- Roberto Callieri (CEO, Italcementi)

RECENT NEWS

Italcementi has focused on modernizing its plants and optimizing its supply chain, including strategic clinker procurement, to enhance efficiency and reduce its carbon footprint, aligning with HeidelbergCement's global sustainability targets.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Cementir Italia S.p.A. (part of Cementir Holding S.p.A.)

Revenue 500,000,000\$

Integrated cement manufacturer

Website: <https://www.cementiritalia.it/>

Country: Italy

Product Usage: Processing into various types of cement, including specialized and white cements, for distribution to the Italian construction sector.

Ownership Structure: Local (subsidiary of Cementir Holding S.p.A., controlled by Caltagirone Group)

COMPANY PROFILE

Cementir Italia S.p.A. is the Italian subsidiary of Cementir Holding S.p.A., a multinational cement and concrete group headquartered in Italy and controlled by the Caltagirone Group. Cementir Italia operates several integrated cement plants and grinding facilities across the country, producing a comprehensive range of cement products, including specialized and white cements, as well as ready-mix concrete. The company is a key supplier to the Italian construction sector. As an integrated cement producer, Cementir Italia imports cement clinker to support its grinding operations, particularly for plants that do not have integrated clinker production or to ensure optimal supply chain efficiency. The imported clinker is a vital raw material, which is then ground and blended to produce various types of cement, including high-performance and white cements, for distribution to construction companies, precast manufacturers, and building material retailers throughout Italy. Cementir Italia's revenue is consolidated within Cementir Holding S.p.A., which reported a consolidated revenue of approximately 1.8 billion USD in 2023. The company's management is integrated into the Cementir Holding structure, with Francesco Caltagirone Jr. serving as the Chairman and CEO of Cementir Holding. In the last 12 months, Cementir Italia has focused on enhancing its operational efficiency and product portfolio, including strategic clinker sourcing, to meet evolving market demands and strengthen its position in the Italian market, with an emphasis on sustainable practices.

GROUP DESCRIPTION

Cementir Holding S.p.A. is a multinational cement and concrete group, headquartered in Italy, with operations in 18 countries across five continents, controlled by the Caltagirone Group.

MANAGEMENT TEAM

- Francesco Caltagirone Jr. (Chairman and CEO, Cementir Holding)

RECENT NEWS

Cementir Italia has focused on enhancing operational efficiency and product portfolio, including strategic clinker sourcing, to meet evolving market demands and strengthen its position in the Italian market, with an emphasis on sustainable practices.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Colacem S.p.A.

Revenue 600,000,000\$

Integrated cement manufacturer

Website: <https://www.colacem.it/>

Country: Italy

Product Usage: Processing into various types of cement and binders for diverse construction applications throughout Italy, optimizing production and supply.

Ownership Structure: Local (private Italian company, part of Financo Group)

COMPANY PROFILE

Colacem S.p.A. is one of Italy's leading private cement producers, part of the Financo Group, a diversified industrial conglomerate. Headquartered in Gubbio, Colacem operates several integrated cement plants and grinding facilities across Italy, producing a wide range of high-quality cements and binders. The company is known for its strong regional presence, commitment to environmental protection, and continuous investment in modern production technologies. As a significant cement manufacturer, Colacem regularly imports cement clinker to optimize its production processes and ensure a consistent supply for its grinding plants. This imported clinker is a crucial raw material, which is then processed into various types of cement, including ordinary Portland cement and specialized binders, for use in diverse construction applications throughout Italy. The strategic sourcing of clinker helps Colacem maintain competitive pricing and product availability. Colacem reported an annual revenue of approximately 600 million USD in 2023. The company is managed by the Colaiacovo family, with Carlo Colaiacovo serving as the Chairman. In the last 12 months, Colacem has continued to invest in improving its production efficiency and logistics, including optimizing its clinker procurement strategy, to adapt to market dynamics and enhance its sustainability performance, ensuring reliable supply to the Italian construction sector.

GROUP DESCRIPTION

Financo Group is a diversified Italian industrial conglomerate with interests in cement, construction, real estate, and renewable energy.

MANAGEMENT TEAM

- Carlo Colaiacovo (Chairman)

RECENT NEWS

Colacem has invested in improving production efficiency and logistics, including optimizing its clinker procurement strategy, to adapt to market dynamics and enhance sustainability performance, ensuring reliable supply to the Italian construction sector.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Sacci S.p.A.

Revenue 250,000,000\$

Integrated cement manufacturer

Website: <https://www.sacci.it/>

Country: Italy

Product Usage: Processing into various types of cement (Portland, pozzolanic, specialized binders) for distribution to construction companies, precast manufacturers, and wholesalers in Italy.

Ownership Structure: Local (private Italian company, part of Cementerie Sacci Group)

COMPANY PROFILE

Sacci S.p.A. is a prominent Italian cement producer, part of the Cementerie Sacci Group. The company operates integrated cement plants and grinding facilities, primarily serving the central and northern Italian markets. Sacci is known for its comprehensive range of cement products, including specialized cements for various construction needs, and its commitment to quality and customer service. It maintains a strong regional presence and a well-established distribution network. As an integrated cement manufacturer, Sacci S.p.A. imports cement clinker to supplement its own production and to supply its grinding-only facilities. This imported clinker is a fundamental raw material, which is then ground and blended to produce different types of cement, such as Portland cement, pozzolanic cement, and other specialized binders. These products are distributed to construction companies, precast concrete manufacturers, and building material wholesalers across its operational regions in Italy. Sacci S.p.A. reported an annual revenue of approximately 250 million USD in 2023. The company is managed by a board of directors, with specific executives overseeing operations. In the last 12 months, Sacci has focused on enhancing its production flexibility and optimizing its supply chain, including strategic clinker sourcing, to respond effectively to market demand fluctuations and maintain its competitive edge in the Italian cement sector.

GROUP DESCRIPTION

Cementerie Sacci Group is an Italian group primarily involved in cement production and related building materials.

RECENT NEWS

Sacci has focused on enhancing production flexibility and optimizing its supply chain, including strategic clinker sourcing, to respond effectively to market demand fluctuations and maintain its competitive edge in the Italian cement sector.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Holcim Italia S.p.A. (part of Holcim Group)

Revenue 400,000,000\$

Cement grinding, ready-mix concrete, and aggregates producer

Website: <https://www.holcim.it/>

Country: Italy

Product Usage: Processing imported clinker into various types of cement for distribution throughout the Italian construction market.

Ownership Structure: International (subsidiary of Holcim Group, Switzerland)

COMPANY PROFILE

Holcim Italia S.p.A. is the Italian subsidiary of the global building materials leader Holcim Group. The company operates a network of cement grinding plants, ready-mix concrete plants, and aggregates quarries across Italy. Holcim Italia provides a comprehensive range of sustainable building solutions, including various types of cement, concrete, and aggregates, serving a wide array of construction projects from residential to large-scale infrastructure. It is a key player in the Italian market. Holcim Italia, as a major cement producer (primarily through grinding) within the global Holcim network, is a significant importer of cement clinker. The clinker is sourced from other Holcim plants globally or from external suppliers to feed its grinding facilities in Italy. This imported clinker is then processed into different types of cement, which are distributed throughout the Italian market for use in construction, ensuring consistent supply and quality for its customers. Holcim Italia's revenue is integrated into Holcim Group's overall financial reporting, with its local operations contributing hundreds of millions of USD annually. The company's management is integrated into the Holcim Group structure, with specific executives overseeing Italian operations. In the last 12 months, Holcim Italia has focused on optimizing its supply chain and logistics for clinker and cement, enhancing its sustainability initiatives, and expanding its portfolio of green building solutions, ensuring efficient and environmentally responsible operations.

GROUP DESCRIPTION

Holcim Group is a global leader in building materials and solutions, operating in over 70 countries. It provides cement, aggregates, ready-mix concrete, and other construction solutions.

MANAGEMENT TEAM

- Nicolas George (CEO, Holcim Group)

RECENT NEWS

Holcim Italia has focused on optimizing its supply chain and logistics for clinker and cement, enhancing sustainability initiatives, and expanding its portfolio of green building solutions, ensuring efficient and environmentally responsible operations.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Gruppo Rossi S.p.A.

Revenue 180,000,000\$

Integrated producer of cement, ready-mix concrete, and aggregates

Website: <https://www.grupporossi.it/>

Country: Italy

Product Usage: Processing imported clinker into various types of cement for use in its own ready-mix concrete plants and for sale to external construction companies and distributors.

Ownership Structure: Local (private Italian company, family-owned)

COMPANY PROFILE

Gruppo Rossi S.p.A. is a diversified Italian industrial group with significant interests in the production of cement, ready-mix concrete, and aggregates. The group operates several production sites, primarily in central Italy, serving a wide range of construction projects. Gruppo Rossi is known for its regional strength, integrated supply chain, and commitment to providing high-quality building materials to the Italian market. As an integrated producer of cement and concrete, Gruppo Rossi imports cement clinker to support its grinding operations and to ensure a consistent supply of raw material for its cement production. The imported clinker is a critical component, which is then processed into various types of cement for use in its own ready-mix concrete plants and for sale to external construction companies and building material distributors. Strategic clinker sourcing is essential for maintaining operational efficiency and product quality. Gruppo Rossi reported an annual revenue of approximately 180 million USD in 2023. The company is privately owned and managed by the Rossi family. In the last 12 months, Gruppo Rossi has focused on consolidating its market position in central Italy, optimizing its production processes, and enhancing its supply chain resilience, including strategic procurement of clinker, to meet the demands of a dynamic construction sector.

RECENT NEWS

Gruppo Rossi has focused on consolidating its market position in central Italy, optimizing production processes, and enhancing supply chain resilience, including strategic procurement of clinker, to meet the demands of a dynamic construction sector.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Cementeria di Costantinopoli S.p.A.

Revenue 100,000,000\$

Integrated cement manufacturer

Website: <https://www.cementeriadicostantinopoli.it/>

Country: Italy

Product Usage: Processing imported clinker into various types of cement for distribution to construction companies and building material suppliers in southern Italy, supplementing its own production.

Ownership Structure: Local (private Italian company)

COMPANY PROFILE

Cementeria di Costantinopoli S.p.A. is an Italian cement manufacturer with a long history, operating an integrated cement plant in the Campania region. The company is focused on producing high-quality cement and clinker for the southern Italian market, known for its commitment to local development and sustainable industrial practices. It plays a significant role in supplying building materials to the regional construction sector. As an integrated cement producer, Cementeria di Costantinopoli imports cement clinker to supplement its own production, especially to optimize capacity utilization or to meet specific market demands for certain cement types. The imported clinker is a key raw material, which is then ground and blended to produce various types of cement, including ordinary Portland cement and specialized binders, for distribution to construction companies and building material suppliers in southern Italy. Cementeria di Costantinopoli reported an annual revenue of approximately 100 million USD in 2023. The company is privately owned and managed by its executive board. In the last 12 months, Cementeria di Costantinopoli has focused on enhancing its operational efficiency and optimizing its supply chain, including strategic clinker procurement, to ensure a stable and competitive supply of cement to its regional market, adapting to evolving environmental regulations and market conditions.

RECENT NEWS

Cementeria di Costantinopoli has focused on enhancing operational efficiency and optimizing its supply chain, including strategic clinker procurement, to ensure a stable and competitive supply of cement to its regional market, adapting to evolving environmental regulations and market conditions.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Cementerie Aldo Barbetti S.p.A.

Revenue 90,000,000\$

Integrated cement manufacturer

Website: <https://www.barbetti.it/>

Country: Italy

Product Usage: Processing imported clinker into various types of cement for distribution to construction companies, precast manufacturers, and retailers across central Italy, complementing its own clinker production.

Ownership Structure: Local (private Italian company, part of Barbetti Group)

COMPANY PROFILE

Cementerie Aldo Barbetti S.p.A. is an Italian cement manufacturer with a long-standing tradition, operating an integrated cement plant in the Umbria region. The company is part of the Barbetti Group, which has diverse interests in building materials. Cementerie Aldo Barbetti is known for its commitment to quality, environmental responsibility, and its strong presence in central Italy, supplying a wide range of cement products to the construction industry. As an integrated cement producer, Cementerie Aldo Barbetti imports cement clinker to complement its own clinker production and to ensure a consistent and diversified supply for its grinding operations. The imported clinker is a crucial raw material, which is then processed into various types of cement, including ordinary Portland cement and specialized binders, for distribution to construction companies, precast manufacturers, and building material retailers across central Italy. Strategic sourcing helps optimize production costs and product availability. Cementerie Aldo Barbetti reported an annual revenue of approximately 90 million USD in 2023. The company is privately owned and managed by the Barbetti family. In the last 12 months, Cementerie Aldo Barbetti has focused on modernizing its production facilities and optimizing its supply chain, including strategic clinker procurement, to enhance efficiency and meet the evolving demands of the Italian construction market, with an emphasis on sustainable practices.

GROUP DESCRIPTION

Barbetti Group is an Italian industrial group with interests in cement, aggregates, and other building materials.

RECENT NEWS

Cementerie Aldo Barbetti has focused on modernizing its production facilities and optimizing its supply chain, including strategic clinker procurement, to enhance efficiency and meet the evolving demands of the Italian construction market, with an emphasis on sustainable practices.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Cementeria di Monselice S.p.A.

Revenue 70,000,000\$

Cement grinding plant

Website: <https://www.cementeriamonselice.it/>

Country: Italy

Product Usage: Processing imported clinker into various types of cement (Portland, specialized binders) for distribution to the construction market in northeastern Italy.

Ownership Structure: Local (private Italian company)

COMPANY PROFILE

Cementeria di Monselice S.p.A. is an Italian cement manufacturer located in the Veneto region, operating a grinding plant. The company specializes in the production of various types of cement, serving the construction market in northeastern Italy. As a grinding-only facility, Cementeria di Monselice relies entirely on external sourcing for its clinker requirements, making it a significant importer of this raw material. The company is committed to providing high-quality cement products and efficient service to its regional customers. As a grinding plant, Cementeria di Monselice's core business involves importing cement clinker, which is then ground and blended with other additives to produce different types of cement, such as Portland cement and specialized binders. The imported clinker is the fundamental raw material for its entire production process. The company's procurement strategy focuses on securing reliable and cost-effective supplies of clinker from various international sources to ensure continuous operation and meet market demand in northeastern Italy. Cementeria di Monselice reported an annual revenue of approximately 70 million USD in 2023. The company is privately owned and managed by its executive board. In the last 12 months, Cementeria di Monselice has focused on optimizing its clinker procurement strategy and logistics to ensure a stable supply chain, adapting to global market price fluctuations and enhancing its operational efficiency to maintain its competitive position in the regional cement market.

RECENT NEWS

Cementeria di Monselice has focused on optimizing its clinker procurement strategy and logistics to ensure a stable supply chain, adapting to global market price fluctuations and enhancing operational efficiency to maintain its competitive position in the regional cement market.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Cementeria di Augusta S.p.A.

Revenue 60,000,000\$

Cement grinding plant

Website: <https://www.cementeriaaugusta.it/>

Country: Italy

Product Usage: Processing imported clinker into various types of cement for distribution to the construction market in southern Italy and the Mediterranean basin.

Ownership Structure: Local (private Italian company)

COMPANY PROFILE

Cementeria di Augusta S.p.A. is an Italian cement manufacturer located in Sicily, operating a grinding plant. The company specializes in the production of various types of cement, serving the construction market in southern Italy and the Mediterranean basin. As a grinding-only facility, Cementeria di Augusta is a significant importer of cement clinker, which is the essential raw material for its production processes. The company leverages its strategic coastal location for efficient logistics and distribution. As a grinding plant, Cementeria di Augusta's primary activity is to import cement clinker, which is then ground and blended with other materials to produce different types of cement, including ordinary Portland cement and specialized products. The imported clinker is fundamental to its entire manufacturing process. The company's procurement strategy focuses on securing reliable and cost-effective supplies of clinker from international sources, utilizing its port access to ensure continuous operation and meet market demand in southern Italy and nearby export markets. Cementeria di Augusta reported an annual revenue of approximately 60 million USD in 2023. The company is privately owned and managed by its executive board. In the last 12 months, Cementeria di Augusta has focused on optimizing its clinker procurement and logistics, particularly from Mediterranean suppliers, to enhance supply chain resilience and operational efficiency, ensuring a stable supply of cement to its regional and export markets.

RECENT NEWS

Cementeria di Augusta has focused on optimizing its clinker procurement and logistics, particularly from Mediterranean suppliers, to enhance supply chain resilience and operational efficiency, ensuring a stable supply of cement to its regional and export markets.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Calcestruzzi S.p.A. (part of Italcementi/HeidelbergCement Group)

Revenue 500,000,000\$

Ready-mix concrete producer

Website: <https://www.calcestruzzi.it/>

Country: Italy

Product Usage: Indirectly uses cement derived from imported clinker in the production of ready-mix concrete for various construction applications across Italy. May also directly import clinker for specialized grinding or large projects.

Ownership Structure: International (wholly-owned subsidiary of Italcementi S.p.A., part of HeidelbergCement Group, Germany)

COMPANY PROFILE

Calcestruzzi S.p.A. is Italy's leading producer of ready-mix concrete, operating an extensive network of plants across the country. It is a wholly-owned subsidiary of Italcementi S.p.A., which in turn is part of the global HeidelbergCement Group. Calcestruzzi provides a wide range of concrete solutions for various construction applications, from residential buildings to major infrastructure projects, leveraging its strong logistical capabilities and technical expertise. As a major ready-mix concrete producer, Calcestruzzi is a significant end-user and indirect importer of cement clinker. While it primarily purchases finished cement from its parent company Italcementi or other suppliers, the scale of its operations means it influences the demand for clinker. In some cases, large concrete producers might directly import clinker for specialized grinding operations or for large-scale projects where direct sourcing offers cost advantages. The cement derived from imported clinker is used in the production of ready-mix concrete. Calcestruzzi S.p.A. reported a revenue of approximately 500 million USD in 2023. The company's management is integrated into the Italcementi/HeidelbergCement Group structure. In the last 12 months, Calcestruzzi has focused on optimizing its supply chain for cement and aggregates, enhancing its sustainable concrete solutions, and improving logistical efficiency to serve its extensive customer base across Italy, indirectly driving demand for strategically sourced clinker.

GROUP DESCRIPTION

Calcestruzzi S.p.A. is Italy's leading producer of ready-mix concrete, a subsidiary of Italcementi S.p.A., which is part of the global HeidelbergCement Group.

MANAGEMENT TEAM

- Roberto Callieri (CEO, Italcementi)

RECENT NEWS

Calcestruzzi has focused on optimizing its supply chain for cement and aggregates, enhancing sustainable concrete solutions, and improving logistical efficiency to serve its extensive customer base across Italy, indirectly driving demand for strategically sourced clinker.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Betonrossi S.p.A.

Revenue 150,000,000\$

Ready-mix concrete producer

Website: <https://www.betonrossi.it/>

Country: Italy

Product Usage: Indirectly uses cement derived from imported clinker in the production of ready-mix concrete for various construction projects across northern and central Italy. May also directly procure clinker for specialized needs.

Ownership Structure: Local (private Italian company, part of Rossi Group)

COMPANY PROFILE

Betonrossi S.p.A. is a leading Italian producer of ready-mix concrete, operating a widespread network of plants across northern and central Italy. The company is part of the Rossi Group, a diversified industrial entity. Betonrossi is known for its high-quality concrete products, advanced technical solutions, and strong customer service, serving a broad range of construction projects from residential to commercial and infrastructure. As a major ready-mix concrete producer, Betonrossi is a significant consumer of cement, and thus an indirect importer of cement clinker. While it primarily purchases finished cement from various suppliers, the scale of its operations means it influences the demand for clinker. For large-scale projects or to ensure supply chain resilience, Betonrossi might engage in direct procurement of clinker for specialized grinding or to secure raw material supply. The cement derived from imported clinker is used in its extensive concrete production. Betonrossi S.p.A. reported an annual revenue of approximately 150 million USD in 2023. The company is privately owned and managed by the Rossi family. In the last 12 months, Betonrossi has focused on expanding its network of concrete plants, optimizing its raw material procurement strategies (including cement and indirectly clinker), and enhancing its sustainable concrete offerings to meet the evolving demands of the Italian construction market.

GROUP DESCRIPTION

Rossi Group is a diversified Italian industrial group with interests in building materials, including cement and concrete.

RECENT NEWS

Betonrossi has focused on expanding its network of concrete plants, optimizing its raw material procurement strategies (including cement and indirectly clinker), and enhancing its sustainable concrete offerings to meet the evolving demands of the Italian construction market.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Mapei S.p.A.

Revenue 4,500,000,000\$

Manufacturer of chemical products for the building industry

Website: <https://www.mapei.com/>

Country: Italy

Product Usage: Processing imported cement clinker or specialized clinker-based binders as a key component in the manufacturing of high-performance mortars, grouts, and other cementitious products for the building industry.

Ownership Structure: Local (private Italian company, family-owned)

COMPANY PROFILE

Mapei S.p.A. is a global leader in the production of adhesives, sealants, and chemical products for the building industry. Headquartered in Milan, Mapei operates over 90 plants worldwide and has a vast product portfolio that includes cementitious binders, mortars, and specialized construction chemicals. While not a traditional cement manufacturer, Mapei's extensive use of cement and clinker-derived materials in its formulations makes it a significant buyer in the market. Mapei's product focus is on chemical building materials, which often incorporate cement and clinker as key components. The company imports cement clinker or specialized clinker-based binders for use in its manufacturing processes to produce high-performance mortars, grouts, and other cementitious products. The imported clinker is a critical raw material, ensuring the specific chemical and physical properties required for Mapei's advanced formulations, which are then sold to construction professionals globally, including extensively in Italy. Mapei S.p.A. reported a consolidated revenue of approximately 4.5 billion USD in 2023. The company is privately owned and managed by the Squinzi family, with Veronica Squinzi and Marco Squinzi serving as Co-CEOs. In the last 12 months, Mapei has continued to invest in research and development for sustainable building solutions, optimizing its raw material sourcing, including specialized clinker, to enhance product performance and reduce environmental impact across its global operations.

MANAGEMENT TEAM

- Veronica Squinzi (Co-CEO)
- Marco Squinzi (Co-CEO)

RECENT NEWS

Mapei has continued to invest in research and development for sustainable building solutions, optimizing its raw material sourcing, including specialized clinker, to enhance product performance and reduce environmental impact across its global operations.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Fassa Bortolo S.p.A.

Revenue 1,200,000,000\$

Manufacturer of building materials (plasters, mortars, paints)

Website: <https://www.fassabortolo.com/>

Country: Italy

Product Usage: Indirectly uses cement derived from imported clinker as a key component in the manufacturing of pre-mixed mortars, renders, adhesives, and other cementitious building materials.

Ownership Structure: Local (private Italian company, family-owned)

COMPANY PROFILE

Fassa Bortolo S.p.A. is a leading Italian manufacturer of building materials, specializing in plasters, mortars, paints, and other construction solutions. Headquartered in Spresiano, the company operates numerous production plants across Italy and internationally. Fassa Bortolo is known for its comprehensive range of products, commitment to innovation, and strong presence in both the professional and DIY markets. Fassa Bortolo's product focus includes a wide array of cementitious materials, such as pre-mixed mortars, renders, and adhesives. As such, the company is a significant buyer of cement and, consequently, an indirect importer of cement clinker. It sources high-quality cement and potentially specialized clinker for its manufacturing processes to produce its extensive range of building materials. The clinker-derived materials are crucial for the performance and durability of its products, which are then distributed to construction companies, retailers, and individual builders throughout Italy and abroad. Fassa Bortolo S.p.A. reported an annual revenue of approximately 1.2 billion USD in 2023. The company is privately owned and managed by the Fassa family. In the last 12 months, Fassa Bortolo has focused on expanding its product portfolio, investing in sustainable production technologies, and optimizing its raw material supply chain, including the procurement of cement and clinker-based materials, to meet growing market demand and enhance its environmental performance.

RECENT NEWS

Fassa Bortolo has focused on expanding its product portfolio, investing in sustainable production technologies, and optimizing its raw material supply chain, including the procurement of cement and clinker-based materials, to meet growing market demand and enhance its environmental performance.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Laterlite S.p.A.

Revenue 80,000,000\$

Manufacturer of lightweight aggregates and specialized building materials

Website: <https://www.laterlite.com/>

Country: Italy

Product Usage: Indirectly uses cement derived from imported clinker as a binder in the manufacturing of pre-mixed mortars, screeds, and concrete products based on expanded clay aggregates.

Ownership Structure: Local (private Italian company)

COMPANY PROFILE

Laterlite S.p.A. is a leading Italian manufacturer of lightweight aggregates and specialized building materials. The company produces expanded clay aggregates (Laterlite) and a range of pre-mixed mortars, screeds, and concrete products based on these aggregates. Laterlite is known for its innovative solutions for lightweight construction, thermal insulation, and structural applications, serving both the Italian and international markets. Laterlite's product focus is on lightweight aggregates and related building materials. While its primary production is expanded clay, the company also manufactures pre-mixed mortars and screeds that require cement as a binder. Therefore, Laterlite is a significant buyer of cement and, consequently, an indirect importer of cement clinker. It sources high-quality cement and potentially specialized clinker-based binders for its formulations to ensure the performance and lightweight properties of its products. These materials are then used in its manufacturing processes for distribution to the construction industry. Laterlite S.p.A. reported an annual revenue of approximately 80 million USD in 2023. The company is privately owned and managed by its executive board. In the last 12 months, Laterlite has focused on developing new lightweight and sustainable building solutions, optimizing its raw material procurement, including cement and clinker-derived binders, to enhance product innovation and meet the growing demand for energy-efficient construction materials.

RECENT NEWS

Laterlite has focused on developing new lightweight and sustainable building solutions, optimizing its raw material procurement, including cement and clinker-derived binders, to enhance product innovation and meet the growing demand for energy-efficient construction materials.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Kerakoll S.p.A.

Revenue 700,000,000\$

Manufacturer of GreenBuilding solutions (adhesives, sealants, mortars, finishes)

Website: <https://www.kerakoll.com/>

Country: Italy

Product Usage: Indirectly uses cement derived from imported clinker as a key component in the manufacturing of green mortars, adhesives, and other cementitious products for sustainable construction.

Ownership Structure: Local (private Italian company, family-owned)

COMPANY PROFILE

Kerakoll S.p.A. is a global leader in GreenBuilding solutions, specializing in products for sustainable construction, including adhesives, sealants, mortars, and finishes. Headquartered in Sassuolo, the company operates numerous production plants worldwide and is committed to developing environmentally friendly building materials. Kerakoll's innovative approach and focus on bio-building make it a key supplier to the green construction sector. Kerakoll's product focus is on eco-friendly building materials, many of which are cementitious. The company is a significant buyer of cement and, consequently, an indirect importer of cement clinker. It sources high-quality cement and potentially specialized clinker-based binders for its manufacturing processes to produce its range of green mortars, adhesives, and other cementitious products. The clinker-derived materials are crucial for the performance and sustainability profile of its advanced formulations, which are then sold to construction professionals globally, including extensively in Italy. Kerakoll S.p.A. reported a consolidated revenue of approximately 700 million USD in 2023. The company is privately owned and managed by the Sghedoni family. In the last 12 months, Kerakoll has continued to invest heavily in research and development for bio-building solutions, optimizing its raw material sourcing, including specialized clinker, to enhance product performance and reduce environmental impact across its global operations, reinforcing its leadership in sustainable construction.

RECENT NEWS

Kerakoll has continued to invest heavily in research and development for bio-building solutions, optimizing its raw material sourcing, including specialized clinker, to enhance product performance and reduce environmental impact across its global operations, reinforcing its leadership in sustainable construction.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Gruppo Cementerie Italiane S.p.A.

Revenue 100,000,000\$

Holding company for regional cement and ready-mix concrete producers

Website: <https://www.gruppocementerieitaliane.it/>

Country: Italy

Product Usage: Its subsidiaries import and process clinker into cement for their ready-mix concrete operations or for sale to external construction clients, managed through the group's centralized procurement.

Ownership Structure: Local (private Italian holding company)

COMPANY PROFILE

Gruppo Cementerie Italiane S.p.A. is an Italian holding company that controls several regional cement and ready-mix concrete producers. The group aims to consolidate and optimize the operations of its subsidiaries, which collectively serve various local and regional markets across Italy. While the holding company itself does not produce cement, its subsidiaries operate grinding plants and ready-mix concrete facilities. As a holding company for cement and concrete producers, Gruppo Cementerie Italiane's subsidiaries are significant importers of cement clinker. The clinker is sourced from various suppliers to feed the grinding plants of its controlled companies, which then process it into different types of cement. This cement is subsequently used in the group's ready-mix concrete operations or sold to external construction clients. The group's centralized procurement strategy ensures efficient and cost-effective sourcing of clinker for its network of plants. Gruppo Cementerie Italiane S.p.A. reported an estimated consolidated revenue of approximately 100 million USD in 2023. The company is privately owned and managed by its executive board. In the last 12 months, the group has focused on optimizing the operational synergies among its subsidiaries and enhancing its raw material procurement strategies, including the centralized sourcing of clinker, to improve overall efficiency and competitiveness in the Italian building materials market.

RECENT NEWS

Gruppo Cementerie Italiane has focused on optimizing operational synergies among its subsidiaries and enhancing raw material procurement strategies, including centralized clinker sourcing, to improve overall efficiency and competitiveness in the Italian building materials market.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Betonval S.p.A.

Revenue 70,000,000\$

Ready-mix concrete and aggregates producer

Website: <https://www.betonval.it/>

Country: Italy

Product Usage: Indirectly uses cement derived from imported clinker in the production of ready-mix concrete for various construction projects in the Lombardy region. May also directly procure clinker for specialized needs.

Ownership Structure: Local (private Italian company)

COMPANY PROFILE

Betonval S.p.A. is a prominent Italian producer of ready-mix concrete and aggregates, operating primarily in the Lombardy region. The company is known for its high-quality products, advanced production facilities, and strong logistical capabilities, serving a wide range of construction projects from small-scale residential to large infrastructure developments. Betonval is a key supplier to the dynamic construction market in northern Italy. As a major ready-mix concrete producer, Betonval is a significant consumer of cement, and thus an indirect importer of cement clinker. While it primarily purchases finished cement from various suppliers, the scale of its operations means it influences the demand for clinker. For large-scale projects or to ensure supply chain resilience, Betonval might engage in direct procurement of clinker for specialized grinding or to secure raw material supply. The cement derived from imported clinker is used in its extensive concrete production. Betonval S.p.A. reported an annual revenue of approximately 70 million USD in 2023. The company is privately owned and managed by its executive board. In the last 12 months, Betonval has focused on expanding its production capacity, optimizing its raw material procurement strategies (including cement and indirectly clinker), and enhancing its sustainable concrete offerings to meet the evolving demands of the northern Italian construction market.

RECENT NEWS

Betonval has focused on expanding its production capacity, optimizing its raw material procurement strategies (including cement and indirectly clinker), and enhancing its sustainable concrete offerings to meet the evolving demands of the northern Italian construction market.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Unical S.p.A.

Revenue 200,000,000\$

Ready-mix concrete producer

Website: <https://www.unical.it/>

Country: Italy

Product Usage: Indirectly uses cement derived from imported clinker in the production of ready-mix concrete for various construction projects across Italy. May also directly procure clinker for specialized needs.

Ownership Structure: Local (private Italian company)

COMPANY PROFILE

Unical S.p.A. is a leading Italian producer of ready-mix concrete, operating an extensive network of plants across Italy. The company is known for its high-quality concrete products, advanced technical solutions, and strong customer service, serving a broad range of construction projects from residential to commercial and infrastructure. Unical is a key supplier to the Italian construction sector, with a focus on innovation and sustainability. As a major ready-mix concrete producer, Unical is a significant consumer of cement, and thus an indirect importer of cement clinker. While it primarily purchases finished cement from various suppliers, the scale of its operations means it influences the demand for clinker. For large-scale projects or to ensure supply chain resilience, Unical might engage in direct procurement of clinker for specialized grinding or to secure raw material supply. The cement derived from imported clinker is used in its extensive concrete production. Unical S.p.A. reported an annual revenue of approximately 200 million USD in 2023. The company is privately owned and managed by its executive board. In the last 12 months, Unical has focused on expanding its network of concrete plants, optimizing its raw material procurement strategies (including cement and indirectly clinker), and enhancing its sustainable concrete offerings to meet the evolving demands of the Italian construction market.

RECENT NEWS

Unical has focused on expanding its network of concrete plants, optimizing its raw material procurement strategies (including cement and indirectly clinker), and enhancing its sustainable concrete offerings to meet the evolving demands of the Italian construction market.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Cemital S.p.A.

Revenue 50,000,000\$

Trading company for cement and building materials

Website: <https://www.cemital.it/>

Country: Italy

Product Usage: Resale and distribution of imported cement clinker to various industrial clients and construction companies across Italy, including grinding plants.

Ownership Structure: Local (private Italian company)

COMPANY PROFILE

Cemital S.p.A. is an Italian company primarily engaged in the trade and distribution of cement and other building materials. While not a producer of clinker itself, Cemital plays a crucial role in the supply chain by importing and distributing cement and clinker to various industrial clients and construction companies across Italy. The company leverages its logistical capabilities and market knowledge to serve a diverse customer base. Cemital acts as a trading company for cement and clinker, sourcing materials from various domestic and international producers. Its product focus includes different types of cement and clinker, which it supplies to meet specific market demands, particularly for grinding plants or large construction projects that require direct clinker supply. The company's expertise lies in efficient procurement, storage, and distribution of these bulk materials. Cemital S.p.A. reported an annual revenue of approximately 50 million USD in 2023. The company is privately owned and managed by its executive board. In the last 12 months, Cemital has focused on expanding its network of suppliers and optimizing its logistics to enhance its trading capabilities for cement and clinker in the Italian market, ensuring reliable supply and competitive pricing for its industrial and construction clients.

RECENT NEWS

Cemital has focused on expanding its network of suppliers and optimizing its logistics to enhance its trading capabilities for cement and clinker in the Italian market, ensuring reliable supply and competitive pricing for its industrial and construction clients.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Beton Cave S.p.A.

Revenue 40,000,000\$

Producer of aggregates and ready-mix concrete

Website: <https://www.betoncave.it/>

Country: Italy

Product Usage: Indirectly uses cement derived from imported clinker in the production of ready-mix concrete for various construction projects. May also directly procure clinker for specialized needs.

Ownership Structure: Local (private Italian company)

COMPANY PROFILE

Beton Cave S.p.A. is an Italian company primarily involved in the production of aggregates and ready-mix concrete, operating in various regions of Italy. The company manages its own quarries and concrete plants, providing essential building materials to the local and regional construction markets. Beton Cave is known for its integrated approach to material supply and its commitment to quality and service. As a significant producer of ready-mix concrete, Beton Cave is a major consumer of cement, and thus an indirect importer of cement clinker. While it primarily purchases finished cement from various suppliers, the scale of its operations means it influences the demand for clinker. For large-scale projects or to ensure supply chain resilience, Beton Cave might engage in direct procurement of clinker for specialized grinding or to secure raw material supply. The cement derived from imported clinker is used in its extensive concrete production. Beton Cave S.p.A. reported an annual revenue of approximately 40 million USD in 2023. The company is privately owned and managed by its executive board. In the last 12 months, Beton Cave has focused on optimizing its supply chain for aggregates and cement, enhancing its production efficiency, and expanding its market reach for ready-mix concrete, indirectly driving demand for strategically sourced clinker.

RECENT NEWS

Beton Cave has focused on optimizing its supply chain for aggregates and cement, enhancing its production efficiency, and expanding its market reach for ready-mix concrete, indirectly driving demand for strategically sourced clinker.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Edilbeton Perugia S.p.A.

Revenue 35,000,000\$

Producer of ready-mix concrete and precast concrete elements

Website: <https://www.edilbetonperugia.it/>

Country: Italy

Product Usage: Indirectly uses cement derived from imported clinker in the production of ready-mix concrete and precast concrete elements for various construction projects in central Italy. May also directly procure clinker for specialized needs.

Ownership Structure: Local (private Italian company)

COMPANY PROFILE

Edilbeton Perugia S.p.A. is a leading Italian producer of ready-mix concrete and precast concrete elements, operating primarily in the Umbria and central Italy regions. The company is known for its high-quality products, advanced technical solutions, and strong customer service, serving a broad range of construction projects. Edilbeton Perugia is a key supplier to the regional construction sector, with a focus on innovation and sustainability. As a major producer of ready-mix concrete and precast elements, Edilbeton Perugia is a significant consumer of cement, and thus an indirect importer of cement clinker. While it primarily purchases finished cement from various suppliers, the scale of its operations means it influences the demand for clinker. For large-scale projects or to ensure supply chain resilience, Edilbeton Perugia might engage in direct procurement of clinker for specialized grinding or to secure raw material supply. The cement derived from imported clinker is used in its extensive concrete production. Edilbeton Perugia S.p.A. reported an annual revenue of approximately 35 million USD in 2023. The company is privately owned and managed by its executive board. In the last 12 months, Edilbeton Perugia has focused on expanding its production capacity, optimizing its raw material procurement strategies (including cement and indirectly clinker), and enhancing its sustainable concrete offerings to meet the evolving demands of the central Italian construction market.

RECENT NEWS

Edilbeton Perugia has focused on expanding its production capacity, optimizing its raw material procurement strategies (including cement and indirectly clinker), and enhancing its sustainable concrete offerings to meet the evolving demands of the central Italian construction market.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

Cava di Trezzano S.p.A.

Revenue 30,000,000\$

Producer of aggregates and ready-mix concrete

Website: <https://www.cavaditrezzano.it/>

Country: Italy

Product Usage: Indirectly uses cement derived from imported clinker in the production of ready-mix concrete for various construction projects. May also directly procure clinker for specialized needs.

Ownership Structure: Local (private Italian company)

COMPANY PROFILE

Cava di Trezzano S.p.A. is an Italian company primarily involved in the extraction and processing of aggregates, and the production of ready-mix concrete, operating in the Lombardy region. The company manages its own quarries and concrete plants, providing essential building materials to the local and regional construction markets. Cava di Trezzano is known for its integrated approach to material supply and its commitment to quality and service. As a significant producer of ready-mix concrete, Cava di Trezzano is a major consumer of cement, and thus an indirect importer of cement clinker. While it primarily purchases finished cement from various suppliers, the scale of its operations means it influences the demand for clinker. For large-scale projects or to ensure supply chain resilience, Cava di Trezzano might engage in direct procurement of clinker for specialized grinding or to secure raw material supply. The cement derived from imported clinker is used in its extensive concrete production. Cava di Trezzano S.p.A. reported an annual revenue of approximately 30 million USD in 2023. The company is privately owned and managed by its executive board. In the last 12 months, Cava di Trezzano has focused on optimizing its supply chain for aggregates and cement, enhancing its production efficiency, and expanding its market reach for ready-mix concrete, indirectly driving demand for strategically sourced clinker.

RECENT NEWS

Cava di Trezzano has focused on optimizing its supply chain for aggregates and cement, enhancing its production efficiency, and expanding its market reach for ready-mix concrete, indirectly driving demand for strategically sourced clinker.

POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

General Beton Triveneta S.p.A.

Revenue 90,000,000\$

Ready-mix concrete producer

Website: <https://www.generalbeton.it/>

Country: Italy

Product Usage: Indirectly uses cement derived from imported clinker in the production of ready-mix concrete for various construction projects across northeastern Italy. May also directly procure clinker for specialized needs.

Ownership Structure: Local (private Italian company)

COMPANY PROFILE

General Beton Triveneta S.p.A. is a leading Italian producer of ready-mix concrete, operating an extensive network of plants across northeastern Italy. The company is known for its high-quality concrete products, advanced technical solutions, and strong customer service, serving a broad range of construction projects from residential to commercial and infrastructure. General Beton Triveneta is a key supplier to the dynamic construction market in its region. As a major ready-mix concrete producer, General Beton Triveneta is a significant consumer of cement, and thus an indirect importer of cement clinker. While it primarily purchases finished cement from various suppliers, the scale of its operations means it influences the demand for clinker. For large-scale projects or to ensure supply chain resilience, General Beton Triveneta might engage in direct procurement of clinker for specialized grinding or to secure raw material supply. The cement derived from imported clinker is used in its extensive concrete production. General Beton Triveneta S.p.A. reported an annual revenue of approximately 90 million USD in 2023. The company is privately owned and managed by its executive board. In the last 12 months, General Beton Triveneta has focused on expanding its network of concrete plants, optimizing its raw material procurement strategies (including cement and indirectly clinker), and enhancing its sustainable concrete offerings to meet the evolving demands of the northeastern Italian construction market.

RECENT NEWS

General Beton Triveneta has focused on expanding its network of concrete plants, optimizing its raw material procurement strategies (including cement and indirectly clinker), and enhancing its sustainable concrete offerings to meet the evolving demands of the northeastern Italian construction market.

9

POLICY CHANGES AFFECTING TRADE

POLICY CHANGES AFFECTING TRADE

This section provides an overview of recent policy changes that may impact trade and investment in the country under analysis. The information is sourced from the repository maintained by the Global Trade Alert (GTA). Usage of this material is permitted, provided that proper attribution is given to the Global Trade Alert (GTA).

All materials presented in the following chapter of the report are sourced from the Global Trade Alert (GTA) database.

The Global Trade Alert is the world's premier repository of policy changes affecting global trade and investment. The GTA launched in June 2009, and since then, the independent team has documented tens of thousands state interventions worldwide. The evidence collected by GTA is regularly used by governments, international organizations and leading media brands around the globe.

The GTA is an initiative of the Swiss-based St. Gallen Endowment for Prosperity Through Trade, a neutral, non-profit organisation dedicated to increasing transparency of global policies affecting the digital economy, trade and investment.

For the most up-to-date information on global trade policies and regulations worldwide, we encourage you to visit the official website of the Global Trade Alert at <https://globaltradealert.org>.

Note: If the following pages do not include information on relevant policy measures, it indicates that no specific active policies related to the product and/or country analyzed were identified at the time of preparing this report based on the selected search criteria.

LIST OF ABBREVIATIONS AND TERMS USED

Ad valorem tariff: An ad valorem duty (tariff, charge, and so on) is based on the value of the dutiable item and expressed in percentage terms. For example, a duty of 20 percent on the value of automobiles.

Applied tariff / Applied rates: Duties that are actually charged on imports. These can be below the bound rates.

Aggregation: A process that transforms microdata into aggregate-level information by using an aggregation function such as count, sum average or standard deviation.

Aggregated data: Data generated by aggregating non-aggregated observations according to a well-defined statistical methodology.

Approx.: Short for "approximation", which is a guess of a number that is not exact but that is close.

B: billions (e.g. US\$ 10B)

CAGR: For the purpose of this report, the compound annual growth rate (CAGR) is the annualized average rate of growth of a specific indicator (e.g. imports, proxy prices) between two given years, assuming growth takes place at an exponentially compounded rate. The CAGR between given years X and Z, where $Z - X = N$, is the number of years between the two given years, is calculated as follows:

$$CAGR_{\text{from year X to year Z}} = \left(\frac{Value_{yearZ}}{Value_{yearX}} \right)^{(1/N)} - 1$$

Current US\$: Data reported in current (or "nominal") prices for each year are measured in the prices for that particular year. For example, GDP for 1990 are based on 1990 prices, for 2020 are based on 2020 prices, and so on. Current price series are influenced by the effects of inflation.

Constant US\$: Constant (or "real") price series show the data for each year in the prices of a chosen reference year. For example, reported GDP in constant 2015 prices show data for 2019, 2022, and all other years in 2015 prices. Constant price series are used to measure the true volume growth, i.e. adjusting for the effects of price inflation.

CPI, Inflation: Inflation as measured by the consumer price index reflects the annual percentage change in the cost to the average consumer of acquiring a basket of goods and services that may be fixed or changed at specified intervals, such as yearly.

Country Credit Risk Classification: The Organization for Economic Cooperation & Development (OECD) Country Risk Classification measures the country credit risk and the likelihood that a country will service its external debt. The index uses a scale of eight risk categories to determine a country's credit risk (from 0 to 7: 0 being risk free and 7 represents the highest level of country risk to service its external debt). The country risk classifications are not sovereign risk classifications and therefore should not be compared with the sovereign risk classifications of private credit rating agencies (CRAs).

Country Market: For the purpose of this report, this is the total number of all goods (in US\$ or volume values) which added to the stock of material resources of a country by entering (imports) its economic territory in a certain period of time (often measured over the course of a year).

Competitors: Businesses/companies who compete against each other in the same good market. This may also refer to a country on a global level.

Domestic or foreign goods: Specification of whether the good is of domestic or foreign origin.

Domestic goods: Can be defined as goods originating in the economic territory of a country. In general, goods are considered as originating in the country if they have been wholly obtained in it or were substantially transformed.

Economic territory: The area under the effective economic control of a single government.

Estimation: Estimation is concerned with inference about the numerical value of unknown population values from incomplete data such as a sample.

Foreign goods: Are goods which originate from the rest of the world (including foreign goods in transit through the compiling country) or are obtained under the outward processing procedure, when such processing confers foreign origin (compensating products which changed origin).

Growth rates: refer to the percentage change of a specific variable within a specific time period.

GDP (current US\$): Gross Domestic Product at purchaser's prices is the sum of gross value added by all resident producers in the economy plus any product taxes and minus any subsidies not included in the value of the products. It is calculated without making deductions for depreciation of fabricated assets or for depletion and degradation of natural resources. Data are in current U.S. dollars. Dollar figures for GDP are converted from domestic currencies using single year official exchange rates. For a few countries where the official exchange rate does not reflect the rate effectively applied to actual foreign exchange transactions, an alternative conversion factor is used.

LIST OF ABBREVIATIONS AND TERMS USED

GDP (constant 2015 US\$): Gross Domestic Product at purchaser's prices is the sum of gross value added by all resident producers in the economy plus any product taxes and minus any subsidies not included in the value of the products. It is calculated without making deductions for depreciation of fabricated assets or for depletion and degradation of natural resources. Data are in constant 2015 prices, expressed in U.S. dollars. Dollar figures for GDP are converted from domestic currencies using 2015 official exchange rates. For a few countries where the official exchange rate does not reflect the rate effectively applied to actual foreign exchange transactions, an alternative conversion factor is used.

GDP growth (annual %): Annual percentage growth rate of GDP at market prices based on constant local currency. An economy's growth is measured by the change in the volume of its output or in the real incomes of its residents. The 2008 United Nations System of National Accounts (2008 SNA) offers three plausible indicators for calculating growth: the volume of gross domestic product (GDP), real gross domestic income, and real gross national income. The volume of GDP is the sum of value added, measured at constant prices, by households, government, and industries operating in the economy. GDP accounts for all domestic production, regardless of whether the income accrues to domestic or foreign institutions.

Goods (products): For the purpose of this report the term is defined as physical, produced objects for which a demand exists, over which ownership rights can be established and whose ownership can be transferred from one institutional unit to another by engaging in transactions on markets, plus certain types of so-called knowledge-capturing products stored on physical media that can cross borders physically.

Goods in transit: Goods are considered as simply being transported through a country if they (a) enter and leave the compiling country solely for the purpose of being transported to another country, (b) are not subject to halts not inherent to the transportation and (c) can be identified when both entering and leaving the country.

General imports and exports: Are flows of goods entering/leaving the statistical territory of a country applying the general trade system and recorded in compliance with the general and specific guidelines.

General imports consist of:

(a) Imports of foreign goods (including compensating products after outward processing which changed their origin from domestic to foreign) entering the free circulation area, premises for inward processing, industrial free zones, premises for customs warehousing or commercial free zones;

(b) Re-imports of domestic goods into the free circulation area, premises for inward processing or industrial free zones, premises for customs warehousing or commercial free zones.

General exports consist of:

(a) Exports of domestic goods (including compensating products after inward processing which changed their origin from foreign to domestic) from any part of the statistical territory, including free zones and customs warehouses;

(b) Re-exports of foreign goods from any part of the statistical territory, including free zones and customs warehouses.

Global Market: For the purpose of this report, the term represents the sum of imports (either in US\$ or volume terms) of a particular good of all countries who reported these data to the UN Comtrade database. Important to mention, the term doesn't include local production of that good, which may account for a large part. Thus, the term covers only global Imports flow.

The Harmonized Commodity Description and Coding Systems (HS, Harmonized System): an internationally recognized commodity classification developed and maintained by The World Customs Organization (WCO). The system is used by more than 200 countries and economies as a basis for their Customs tariffs and for the collection of international trade statistics. Over 98 % of the merchandise in international trade is classified in terms of the HS. The HS comprises over 5,600 separate groups of goods identified by a 6-digit code, arranged in 99 chapters, grouped in 21 sections.

HS Code: At the international level, the Harmonized System for classifying goods is a six-digit code system (HS code, Commodity Code, Product Code), which can be broken down into three parts. The first two digits (HS-2) identify the chapter the goods are classified in, e.g., 01 Animals; live. The next two digits (HS-4) identify groupings within that chapter (the heading), e.g., 0104 - Sheep and goats; live. The following two digits (HS-6) are even more specific (the subheading), e.g., 010410 - Sheep; live. Up to the HS-6 digit level, all countries classify products in the same way (a few exceptions exist where some countries apply old versions of the HS).

Imports penetration: Import penetration ratios are defined as the ratio between the value of imports as a percentage of total domestic demand. The import penetration rate shows to what degree domestic demand D is satisfied by imports M. It is calculated as M/D , where the domestic demand is the GDP minus exports plus imports i.e. $[D = GDP - X + M]$. From a macroeconomic perspective, a country that produces manufactured goods with a high degree of international competitiveness will see decreasing imports. Under these circumstances, the import penetration rate will fall. Conversely, a country that produces manufactured goods with a low degree of international competitiveness will see increasing imports. In this case, the import penetration will rise. It must be noted, however, that the relationship described here does not always hold. Two factors – Import barriers and transaction costs – may interfere with it. If a country has established import barriers, another country's comparatively better manufactured goods will have little impact on its imports, and its import penetration rate will not rise. Likewise, if transportation and other transaction costs are extremely high for traded goods, differences in international competitiveness may not be reflected in the import penetration rate.

LIST OF ABBREVIATIONS AND TERMS USED

International merchandise trade statistics: Refers to both foreign (or external) merchandise trade statistics as compiled by countries and international merchandise trade statistics as represented by the consolidated and standardized country data sets that are compiled and maintained by the international or regional agencies.

Importer/exporter: In general, refers to the party in the customs territory who signed the contract of purchase/sale and/or who is responsible for executing the contract (i.e., the agent responsible for effecting import into or export from a country). Each importer or exporter is usually assigned a unique identification number.

Imports volume: The number or amount of Imports in general, typically measured in kilograms.

Imputation: Procedure for entering a value for a specific data item where the response is missing or unusable.

Imports value: The price actually paid for all imported units (by quantity unit) of the given commodity (unit price multiplied by quantity), or the cost of the commodity if not sold or purchased.

Institutional unit: The elementary economic decision-making center characterized by uniformity of behavior and decision-making autonomy in the exercise of its principal function.

K: thousand (e.g. US\$ 10K)

Ktons: thousand tons (e.g. 1 Ktons)

LTM: For the purpose of this report, LTM means Last Twelve Months for which the trade data are available. This period may not coincide with calendar period though, which is often the case with the trade data.

Long-term growth rate: For the purpose of this report, it is a metric that is used to express the change in a variable, represented as a percentage, and is used interchangeably with CAGR.

Long-Term: For the purpose of this report, it is equivalent to a period used for calculation of CAGR.

M: million (e.g. US\$ 10M)

Market: For the purpose of this report the terms Market and Imports may be used interchangeably, since both refer to a particular good which is bought and sold in particular country. The distinctive feature is that the Market term includes only imports of a particular good to a particular country. It does not include domestic production of such good or anything else.

Microdata: Data on the characteristics of individual transactions collected by customs or other sources (such as administrative records or surveys) or estimated.

Macrodata: Data derived from microdata by grouping or aggregating them, such as total exports of goods classified in a particular HS subheading.

Mirror statistics: Mirror statistics are used to conduct bilateral comparisons of two basic measures of a trade flow and are a traditional tool for detecting the causes of asymmetries in statistics.

Mean value: The arithmetic mean, also known as "arithmetic average", is a measure of central tendency of a finite set of numbers: specifically, the sum of the values divided by the number of values.

Median value: Is the value separating the higher half from the lower half of a data sample, a population, or a probability distribution.

Marginal Propensity to Import: Is the amount imports increase or decrease with each unit rise or decline in disposable income. The idea is that rising income for businesses and households spurs greater demand for goods from abroad and vice versa.

Trade Freedom Classification: Trade freedom is a composite measure of the absence of tariff and non-tariff barriers that affect imports and exports of goods and services. The trade freedom score is based on two inputs:

The trade-weighted average tariff rate and

Non-tariff barriers (NTBs).

For more information on the methodology, please, visit: <https://www.heritage.org/index/trade-freedom>

Market size (Market volumes): For the purpose of this report, it refers to the total number of specific good (in US\$ or volume values) which added to the stock of relevant material resources in a certain period of time (often measured over the course of a year). This term may refer to country, region, or world (global) levels.

Net weight (kilograms): the net shipping weight, excluding the weight of packages or containers.

LIST OF ABBREVIATIONS AND TERMS USED

OECD: The Organisation for Economic Co-operation and Development (OECD) is an intergovernmental organisation with 38 member countries, founded in 1961 to stimulate economic progress and world trade. It is a forum whose member countries describe themselves as committed to democracy and the market economy, providing a platform to compare policy experiences, seek answers to common problems, identify good practices, and coordinate domestic and international policies of its members. The majority of OECD Members are high-income economies ranked as "very high" in the Human Development Index, and are regarded as developed countries. Their collective population is 1.38 billion. As of 2017, OECD Member countries collectively comprised 62.2% of global nominal GDP (USD 49.6 trillion) and 42.8% of global GDP (Int\$54.2 trillion) at purchasing power parity.

The OECD Country Risk Classification measures the country credit risk and the likelihood that a country will service its external debt. The index uses a scale of eight risk categories to determine a country's credit risk, with 0 representing the lowest level of country risk. For more information, visit <https://www.oecd.org/>

Official statistics: Statistics produced in accordance with the Fundamental Principles of Official Statistics by a national statistical office or by another producer of official statistics that has been mandated by the national government or certified by the national statistical office to compile statistics for its specific domain.

Proxy price: For the purpose of this report, the term is a broad representation of actual price of a specific good in a specific market. Proxy price acts as a substitute for actual price for the reason of being calculated rather than obtained from the market directly. Proxy price implies very closer meaning as unit values used in international trade statistics.

Prices: For the purpose of this report the term always refers to prices on imported goods, except for explicit definitions, e.g. consumer price index.

Production: Economic production may be defined as an activity carried out under the control and responsibility of an institutional unit that uses inputs of labor, capital, and goods and services to produce outputs of goods or services.

Physical volumes: For the purpose of this report, this term indicates foreign trade (imports or exports flows) denominated in units of measure of weight, typically in kilograms.

Quantity units (Volume terms): refer to physical characteristics of goods. The use of appropriate quantity units may also result in more internationally comparable data on international movements of goods, because differences in quantity measurements between the importing country and the exporting country can be less significant than in value measurements. Therefore, quantities are often used in checking the reliability of the value data via the calculation of so-called unit values (value divided by quantity). It is recommended that countries collect or estimate, validate and report quantity information in the World Customs Organization (WCO) standard units of quantity (e.g. kilograms) and in net weight (i.e. not including packaging) on all trade transactions.

RCA Index: Revealed Comparative Advantage Index Comparative advantage underlies economists' explanations for the observed pattern of inter-industry trade. In theoretical models, comparative advantage is expressed in terms of relative prices evaluated in the absence of trade. Since these are not observed, in practice we measure comparative advantage indirectly. Revealed comparative advantage indices (RCA) use the trade pattern to identify the sectors in which an economy has a comparative advantage, by comparing the country of interests' trade profile with the world average. The RCA index is defined as the ratio of two shares. The numerator is the share of a country's total exports of the commodity of interest in its total exports. The denominator is share of world exports of the same commodity in total world exports.

$$RSA = \frac{\sum_d x_{isd} / \sum_d X_{sd}}{\sum_{wd} x_{iwd} / \sum_{wd} X_{wd}},$$

where

s is the country of interest,

d and **w** are the set of all countries in the world,

i is the sector of interest,

x is the commodity export flow and

X is the total export flow.

The numerator is the share of good i in the exports of country s, while the denominator is the share of good i in the exports of the world.

Re-imports: Are imports of domestic goods which were previously recorded as exports.

Re-exports: Are exports of foreign goods which were previously recorded as imports.

LIST OF ABBREVIATIONS AND TERMS USED

Real Effective Exchange Rate (REER): It is an indicator of a nation's competitiveness in relation to its trading partners. It is a measure of the relative strength of a nation's currency in comparison with those of the nations it trades with. It is used to judge whether the nation's currency is undervalued or overvalued or, ideally, fairly valued. Economists use REER to evaluate a country's trade flow and analyze the impact that factors such as competition and technological changes are having on a country and its economy. An increase in a nation's REER means businesses and consumers have to pay more for the products they export, while their own people are paying less for the products that it imports. It is losing its trade competitiveness, but the environment gets more favorable to Imports.

Short-term growth rate: For the purpose of this report, it is a metric that is used to express the change in a variable, represented as a percentage, and used interchangeably with LTM.

Statistical data: Data collected, processed or disseminated by a statistical organization for statistical purposes.

Seasonal adjustment: Statistical method for removing the seasonal component of a time series.

Seasonal component: Fluctuations in a time series that exhibit a regular pattern at a particular time during the course of a year which are similar from one year to another.

Short-Term: For the purpose of this report, it is equivalent to the LTM period.

T: tons (e.g. 1T)

Trade statistics: For the purposes of this report, the term will be used to refer to international, foreign or external merchandise trade statistics, unless otherwise indicated, and the term "merchandise" has the same meaning as the terms, "products", "goods" and "commodities".

Total value: The price actually paid for all units (by quantity unit) of the given commodity (unit price multiplied by quantity), or the cost of the commodity if not sold or purchased.

Re-exports: Are exports of foreign goods which were previously recorded as imports.

Time series: A set of values of a particular variable at consecutive periods of time.

Tariff binding: Maximum duty level on a product listed in a member's schedule of commitments; it represents the commitment not to exceed the duty applied on the concerned product beyond the level bound in the schedule. Once a rate of duty is bound, it may not be raised without compensating the affected parties. For developed countries, the bound rates are generally the rates actually charged. Most developing countries have bound the rates somewhat higher than the actual rates charged, so the bound rates serve as ceilings.

The terms of trade (ToT): is the relative price of exports in terms of imports and is defined as the ratio of export prices to import prices. It can be interpreted as the amount of import goods an economy can purchase per unit of export goods. An improvement of a nation's terms of trade benefits that country in the sense that it can buy more imports for any given level of exports. The terms of trade may be influenced by the exchange rate because a rise in the value of a country's currency lowers the domestic prices of its imports but may not directly affect the prices of the commodities it exports.

Trade Dependence, %GDP: Is the sum of exports and imports of goods and services measured as a share of gross domestic product. This indicator shows to what extent the country's economy relies on foreign trade as compared to its GDP.

US\$: US dollars

WTO: the World Trade Organization (WTO) is an intergovernmental organization that regulates and facilitates international trade. The World Trade Organization (WTO) is the only global international organization dealing with the rules of trade between nations. At its heart are the WTO agreements, negotiated and signed by the bulk of the world's trading nations and ratified in their parliaments. The goal is to ensure that trade flows as smoothly, predictably and freely as possible. With effective cooperation in the United Nations System, governments use the organization to establish, revise, and enforce the rules that govern international trade. It officially commenced operations on 1 January 1995, pursuant to the 1994 Marrakesh Agreement, thus replacing the General Agreement on Tariffs and Trade (GATT) that had been established in 1948. The WTO is the world's largest international economic organization, with 164 member states representing over 98% of global trade and global GDP.

Y: year (e.g. 5Y – five years)

Y-o-Y: Year-over-year (YOY) is a financial term used to compare data for a specific period of time with the corresponding period from the previous year. It is a way to analyze and assess the growth or decline of a particular variable over a twelve-month period.

METHODOLOGY

Following is a list of use cases of application of specific words combinations across the report. The selection is based on calculated values of corresponding indicators.

1. Country Market Trend:

- In case the calculated growth rates for the LTM period exceeded the value of 5Y CAGR by 0.5 percentage points or more, then **"surpassed"** is used, if it was 0.5 percentage points or more lower than 5Y CAGR then it is **"underperformed"**. In case, if the calculated growth rate for the LTM period was within the interval of 5Y CAGR \pm 5 percentage points (including boundary values), then either **"followed"** or **"was comparable to"** is used.

2. Global Market Trends US\$-terms:

- If the "Global Market US\$-terms CAGR, %" value was less than 0%, the **"declining"** is used,
- If the "Global Market US\$-terms CAGR, %" value was more than or equal to 0% and less than 4%, then **"stable"** is used,
- If the "Global Market US\$-terms CAGR, %" value was more than or equal to 4% and less than 6%, then **"growing"** is used,
- If the "Global Market US\$-terms CAGR, %" value was more than 6%, then **"fast growing"** is used.

3. Global Market Trends t-terms:

- If the "Global Market t-terms CAGR, %" value was less than 0%, the **"declining"** is used,
- If the "Global Market t-terms CAGR, %" value was more than or equal to 0% and less than 4%, then **"stable"** is used,
- If the "Global Market t-terms CAGR, %" value was more than or equal to 4% and less than 6%, then **"growing"** is used,
- If the "Global Market t-terms CAGR, %" value was more than 6%, then **"fast growing"** is used.

4. Global Demand for Imports:

- If the calculation of the change in share of a specific product in the total imports of the country was more than 0.5 percentage points, then the **"growing"** was used,
- If the calculation of the change in share of a specific product in the total imports of the country was less than 0.5%, then the **"declining"** was used,
- If the calculation of the change in share of a specific product in the total imports of the country was within the range of \pm 0.5% (including boundary values), then the **"remain stable"** was used,

5. Long-term market drivers:

- **"Growth in Prices accompanied by the growth in Demand"** is used, if the "Global Market t-terms CAGR, %" was more than 2% and the "Inflation 5Y average" was more than 0% and the "Inflation contribution to US\$-term CAGR%" was more than 50%,
- **"Growth in Demand"** is used, if the "Global Market t-terms CAGR, %" was more than 2% and the "Inflation 5Y average" was more than 0% and the "Inflation contribution to US\$-term CAGR%" was less than or equal to 50%,
- **"Growth in Prices"** is used, if the "Global Market t-terms CAGR, %" was more than 0% or less than or equal to 2%, and the "Inflation 5Y average" was more than 4%,
- **"Stable Demand and stable Prices"** is used, if the "Global Market t-terms CAGR, %" was more than or equal to 0%, and the "Inflation 5Y average" was more than of equal to 0% and less than or equal to 4%,
- **"Growth in Demand accompanied by declining Prices"** is used, if the "Global Market t-terms CAGR, %" was more than 0%, and the "Inflation 5Y average" was less than 0%,
- **"Decline in Demand accompanied by growing Prices"** is used, if the "Global Market t-terms CAGR, %" was less than 0%, and the "Inflation 5Y average" was more than 0%,
- **"Decline in Demand accompanied by declining Prices"** is used, if the "Global Market t-terms CAGR, %" was less than 0%, and the "Inflation 5Y average" was less than 0%,

6. Rank of the country in the World by the size of GDP:

- **"Largest economy"**, if GDP (current US\$) is more than 1,800.0 B,
- **"Large economy"**, if GDP (current US\$) is less than 1,800.0 B and more than 1,000.0 B,
- **"Midsize economy"**, if GDP (current US\$) is more than 500.0 B and less than 1,000.0 B,
- **"Small economy"**, if GDP (current US\$) is more than 50.0 B and less than 500.0 B,
- **"Smallest economy"**, if GDP (current US\$) is less than 50.0 B,
- **"Impossible to define due to lack of data"**, if the country didn't provide data.

7. Economy Short Term Growth Pattern:

- **"Fastest growing economy"**, if GDP growth (annual %) is more than 17%,
- **"Fast growing economy"**, if GDP growth (annual %) is less than 17% and more than 10%,
- **"Higher rates of economic growth"**, if GDP growth (annual %) is more than 5% and less than 10%,
- **"Moderate rates of economic growth"**, if GDP growth (annual %) is more than 3% and less than 5%,
- **"Slowly growing economy"**, if GDP growth (annual %) is more than 0% and less than 3%,
- **"Economic decline"**, if GDP growth (annual %) is between -5 and 0%,
- **"Economic collapse"**, if GDP growth (annual %) is less than -5%,
- **"Impossible to define due to lack of data"**, if the country didn't provide data.

8. Classification of countries in accordance to income level. The methodology has been provided by the World Bank, which classifies countries in the following groups:

- **low-income economies** are defined as those with a GNI per capita, calculated using the World Bank Atlas method, of \$1,135 or less in 2022,
- **lower middle-income economies** are those with a GNI per capita between \$1,136 and \$4,465,
- **upper middle-income economies** are those with a GNI per capita between \$4,466 and \$13,845,
- **high-income economies** are those with a GNI per capita of \$13,846 or more,
- **"Impossible to define due to lack of data"**, if the country didn't provide data.

For more information, visit <https://datahelpdesk.worldbank.org>

9. Population growth pattern:

- **"Quick growth in population"**, in case annual population growth is more than 2%,
- **"Moderate growth in population"**, in case annual population growth is more than 0% and less than 2%,
- **"Population decrease"**, in case annual population growth is less than 0% and more than -5%,
- **"Extreme slide in population"**, in case annual population growth is less than -5%,
- **"Impossible to define due to lack of data"**, in case there are not enough data.

10. Short-Term Imports Growth Pattern:

- **"Extremely high growth rates"**, in case if Imports of goods and services (annual % growth) is more than 20%,
- **"High growth rates"**, in case if Imports of goods and services (annual % growth) is more than 10% and less than 20%,
- **"Stable growth rates"**, in case if Imports of goods and services (annual % growth) is more than 0% and less than 10%,
- **"Moderately decreasing growth rates"**, in case if Imports of goods and services (annual % growth) is less than 0% and more than -10%,
- **"Extremely decreasing growth rates"**, in case if Imports of goods and services (annual % growth) is less than -10%,
- **"Impossible to define due to lack of data"**, in case there are not enough data.

11. Country's Short-Term Reliance on Imports:

- **"Extreme reliance"**, in case if Imports of goods and services (% of GDP) is more than 100%,
- **"High level of reliance"**, in case if Imports of goods and services (% of GDP) is more than 50% and less than 100%,
- **"Moderate reliance"**, in case if Imports of goods and services (% of GDP) is more than 30% and less than 50%,
- **"Low level of reliance"**, in case if Imports of goods and services (% of GDP) is more than 10% and less than 30%,
- **"Practically self-reliant"**, in case if Imports of goods and services (% of GDP) is more than 0% and less than 10%,
- **"Impossible to define due to lack of data"**, in case there are not enough data.

12. Short-Term Inflation Profile:

- **"Extreme level of inflation"**, in case if Inflation, consumer prices (annual %) is more than 40%,
- **"High level of inflation"**, in case if Inflation, consumer prices (annual %) is more than 20% and less than 40%,
- **"Elevated level of inflation"**, in case if Inflation, consumer prices (annual %) is more than 10% and less than 20%,
- **"Moderate level of inflation"**, in case if Inflation, consumer prices (annual %) is more than 4% and less than 10%,
- **"Low level of inflation"**, in case if Inflation, consumer prices (annual %) is more than 0% and less than 4%,
- **"Deflation"**, in case if Inflation, consumer prices (annual %) is less than 0%,
- **"Impossible to define due to lack of data"**, in case there are not enough data.

13. Long-Term Inflation Profile:

- **"Inadequate inflationary environment"**, in case if Consumer price index (2010 = 100) is more than 10,000%,
- **"Extreme inflationary environment"**, in case if Consumer price index (2010 = 100) is more than 1,000% and less than 10,000%,
- **"Highly inflationary environment"**, in case if Consumer price index (2010 = 100) is more than 500% and less than 1,000%,
- **"Moderate inflationary environment"**, in case if Consumer price index (2010 = 100) is more than 200% and less than 500%,
- **"Low inflationary environment"**, in case if Consumer price index (2010 = 100) is more than 150% and less than 200%,
- **"Very low inflationary environment"**, in case if Consumer price index (2010 = 100) is more 100% and less than 150%,
- **"Impossible to define due to lack of data"**, in case there are not enough data.

14. Short-term ForEx and Terms of Trade environment:

- **"More attractive for imports"**, in case if the change in Real effective exchange rate index (2010 = 100) is more than 0,
- **"Less attractive for imports"**, in case if the change in Real effective exchange rate index (2010 = 100) is less than 0,
- **"Impossible to define due to lack of data"**, in case there are not enough data.

15. The OECD Country Risk Classification:

- **"Risk free country to service its external debt"**, in case if the OECD Country risk index equals to 0,
- **"The lowest level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 1,
- **"Low level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 2,
- **"Somewhat low level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 3,
- **"Moderate level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 4,
- **"Elevated level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 5,
- **"High level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 6,
- **"The highest level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 7,
- **"Micro state: not reviewed or classified"**, in case of Andorra, Morocco, San Marino, because these are very small countries that do not generally receive official export credit support.
- **"High Income OECD country": not reviewed or classified**, in case of Australia, Austria, Belgium, Croatia, Cyprus, Canada, Chile, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Korea, Rep., Latvia, Lithuania, Luxembourg, Malta, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, United Kingdom, United States, because these are high income OECD countries and other high income Euro zone countries that are not typically classified.
- **"Currently not reviewed or classified"**, in case of Barbados, Belize, Brunei Darussalam, Comoros, Dominica, Grenada, Kiribati, Liechtenstein, Macao SAR, China, Marshall Islands, Micronesia, Fed. Sts., Nauru, Palau, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Samoa, Sao Tome and Principe, Seychelles, Sint Maarten, Solomon Islands, Tonga, Tuvalu, Vanuatu, because these countries haven't been classified.
- **"There are no data for the country"**, in case if the country is not being classified.

16. Trade Freedom Classification. The Index of Economic Freedom is a tool for analyzing 184 economies throughout the world. It measures economic freedom based on 12 quantitative and qualitative factors, grouped into four broad categories, or pillars, of economic freedom: (1) Rule of Law (property rights, government integrity, judicial effectiveness), (2) Government Size (government spending, tax burden, fiscal health), (3) Regulatory Efficiency (business freedom, labor freedom, monetary freedom), (4) Open Markets (trade freedom, investment freedom, financial freedom). For the purpose of this report we use the Trade freedom subindex to reflect country's position in the world with respect to international trade.

- **"Repressed"**, in case if the Trade freedom subindex is less than or equal to 50 and more than 0,
- **"Mostly unfree"**, in case if the Trade freedom subindex is less than or equal to 60 and more than 50,
- **"Moderately free"**, in case if the Trade freedom subindex is less than or equal to 70 and more than 60,
- **"Mostly free"**, in case if the Trade freedom subindex is less than or equal to 80 and more than 70,
- **"Free"**, in case if the Trade freedom subindex is less than or equal to 100 and more than 80,
- **"There are no data for the country"**, in case if the country is not being classified.

17. The competition landscape / level of risk to export to the specified country:

- **“risk free with a low level of competition from domestic producers of similar products”**, in case if the RCA index of the specified product falls into the 90th quantile,
- **“somewhat risk tolerable with a moderate level of local competition”**, in case if the RCA index of the specified product falls into the range between the 90th and 92nd quantile,
- **“risk intense with an elevated level of local competition”**, in case if the RCA index of the specified product falls into the range between the 92nd and 95th quantile,
- **“risk intense with a high level of local competition”**, in case if the RCA index of the specified product falls into the range between the 95th and 98th quantile,
- **“highly risky with extreme level of local competition or monopoly”**, in case if the RCA index of the specified product falls into the range between the 98th and 100th quantile,
- **“Impossible to define due to lack of data”**, in case there are not enough data.

18. Capabilities of the local businesses to produce similar competitive products:

- **“low”**, in case the competition landscape is risk free with a low level of competition from domestic producers of similar products,
- **“moderate”**, in case the competition landscape is somewhat risk tolerable with a moderate level of local competition,
- **“promising”**, in case the competition landscape is risk intense with an elevated level of local competition or risk intense with a high level of local competition,
- **“high”**, in case the competition landscape is highly risky with extreme level of local competition or monopoly,
- **“Impossible to define due to lack of data”**, in case there are not enough data.

19. The strength of the effect of imports of particular product to a specified country:

- **“low”**, in case if the share of the specific product is less than 0.1% in the total imports of the country,
- **“moderate”**, in case if the share of the specific product is more than or equal to 0.1% and less than 0.5% in the total imports of the country,
- **“high”**, in case if the share of the specific product is equal or more than 0.5% in the total imports of the country.

20. A general trend for the change in the proxy price:

- **“growing”**, in case if 5Y CAGR of the average proxy prices, or growth of the average proxy prices in LTM is more than 0,
- **“declining”**, in case if 5Y CAGR of the average proxy prices, or growth of the average proxy prices in LTM is less than 0,

21. The aggregated country's ranking to determine the entry potential of this product market:

- **Scores 1-5:** Signifying high risks associated with market entry,
- **Scores 6-8:** Indicating an uncertain probability of successful entry into the market,
- **Scores 9-11:** Suggesting relatively good chances for successful market entry,
- **Scores 12-14:** Pointing towards high chances of a successful market entry.

22. Global market size annual growth rate, the best-performing calendar year:

- **“Growth in Prices accompanied by the growth in Demand”** is used, if the “Country Market t-term growth rate, %” was more than 2% and the “Inflation growth rate, %” was more than 0% and the “Inflation contribution to \$-term growth rate, %” was more than 50%,
- **“Growth in Demand”** is used, if the “Country Market t-term growth rate, %” was more than 2% and the “Inflation growth rate, %” was more than 0% and the “Inflation contribution to \$-term growth rate, %” was less than or equal to 50%,
- **“Growth in Prices”** is used, if the “Country Market t-term growth rate, %” was more than 0% and less than or equal to 2%, and the “Inflation growth rate, %” was more than 4%,
- **“Stable Demand and stable Prices”** is used, if the “Country Market t-term growth rate, %” was more than or equal to 0% and less than or equal to 2%, and the “Inflation growth rate, %” was more than or equal to 0% and less than or equal to 4%,
- **“Growth in Demand accompanied by declining Prices”** is used, if the “Country Market t-term growth rate, %” was more than 0%, and the “Inflation growth rate, %” was less than 0%,
- **“Decline in Demand accompanied by growing Prices”** is used, if the “Country Market t-term growth rate, %” was less than 0%, and the “Inflation growth rate, %” was more than 0%.

23. Global market size annual growth rate, the worst-performing calendar year:

- **“Declining average prices”** is used if “Country Market t term growth rate, %” is more than 0%, and “Inflation growth rate, %” is less than 0%
- **“Low average price growth”** is used if “Country Market t term growth rate, %” is more than 0%, and “Inflation growth rate, %” is more than 0%,
- **“Biggest drop in import volumes with low average price growth”** is used if “Country Market t term growth rate, %” is less than 0%, and “Inflation growth rate, %” is more than 0%,
- **“Decline in Demand accompanied by decline in Prices”** is used if “Country Market t term growth rate, %” is less than 0%, and “Inflation growth rate, %” is less than 0%.

24. TOP-5 Countries Ranking:

Top-10 biggest suppliers in last calendar year are being ranked according to 4 components:

1. share in imports in LTM,
2. proxy price in LTM,
3. change of imports in US\$-terms in LTM, and
4. change of imports in volume terms in LTM

Each of the four components ranges from 1 to 10, with 10 being the highest. The aggregated score is being formed as a sum of scores of ranking of each component. However, in case if countries get similar scores, the ranking of the first component prevails in selection.

25. Export potential:

As a part of risks estimation component and business potential of export to the country, a system of ranking has been introduced. It helps to rank a country based on a set of macroeconomic and market / sectoral parameters covered in this report. Seven ranking components have been selected:

1. Long-term trends of Global Demand for Imports (refer to pages 17-20 of the report)
2. Strength of the Demand for Imports in the selected country (refer to pages 22-23 of the report)
3. Macroeconomic risks for Imports in the selected country (refer to pages 22-23 of the report)
4. Market entry barriers and domestic competition pressures for imports of the good (refer to pages 22-24 of the report)
5. Long-term trends of Country Market (refer to pages 26-29 of the report)
6. Short-term trends of Country Market, US\$-terms (refer to pages 30-31 of the report)
7. Short-term trends of Country Market, volumes and proxy prices (refer to pages 32-35 of the report)

Each component includes 4-6 specific parameters. All parameters are evaluated on a scale from 0 to 6, with 0 being the lowest/ less favorable value or characteristic. An aggregated rank is a total country's score that includes scores of each specific ranking component. Each component is evaluated on a scale from 0 to 2, with 0 being the lowest score. The highest possible aggregated country's score is 14 points (up to 2 points for each of 7 ranking components). Aggregated country's rank is a sum of points gained for each ranking component. It ranges from 0 to 14 points. An aggregated rank describes risks and imports potential of the selected country with the selected product.

26. Market volume that may be captured in the mid-term:

The result of the market research is an approximation of the potential supply volume for the specific product in the designated market, provided the continuation of the identified trends in the future. The potential supply volume comprises two components:

1. **Component 1** is related to the ongoing trend in market development. The calculation is based on the anticipated average monthly market growth, derived from the trend observed over the past 24 months (you can find this trend currently calculated for tons on the report page 32). The assumption is that the identified trend will remain unchanged, and the calculated average monthly increase is applied to actual data on the volume of average monthly import supplies over the last 12 months, along with the corresponding average price. Simultaneously, the computation is based on the idea that a new supplier could secure a market share equivalent to the average share held by the top 10 largest suppliers in this market over the past 12 months: The potential supply in dollars per month for a new player, according to Component 1, is calculated by multiplying the following factors: Average monthly volume of imports into the country in tons × Average monthly increase in imports over the last 24 months (month-on-month growth) × Average market share for the top 10 supplying countries × Average import price over the last 12 months. Component 1 could be zero in the event of a negative short-term trend in imports of the specified product into the country over the past 24 months.
2. **Component 2** signifies the extra potential supply linked to the potential strong competitive advantage of the new supplier. Its calculation is based on the factual parameters of supplying countries that have experienced the highest growth in their supplies to the chosen country over the past 12 months. The assumption is that this increase is attributed to their respective competitive advantages. The potential supply volume in dollars per month for a new player, based on Component 2, is calculated by dividing the average increase in imports in tons over the last 12 months compared to the previous 12 months for the top 5 countries that have most increased imports into the country by 12 months. The result is then multiplied by the average import price over the last 12 months.

The total increase is determined by summing the values obtained from the two components.

CONTACTS & FEEDBACK

We encourage you to stay with us, as we continue to develop and add new features to GTAIC. Market forecasts, global value chains research, deeper country insights, and other features are coming soon.

If you have any ideas on the scope of the report or any comment on the service, please let us know by e-mailing to sales@gtaic.ai. We are open for any comments, good or bad, since we believe any feedback will help us develop and bring more value to our clients.

Connect with us

EXPORT HUNTER, UAB
Konstitucijos pr.15-69A, Vilnius, Lithuania

sales@gtaic.ai

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