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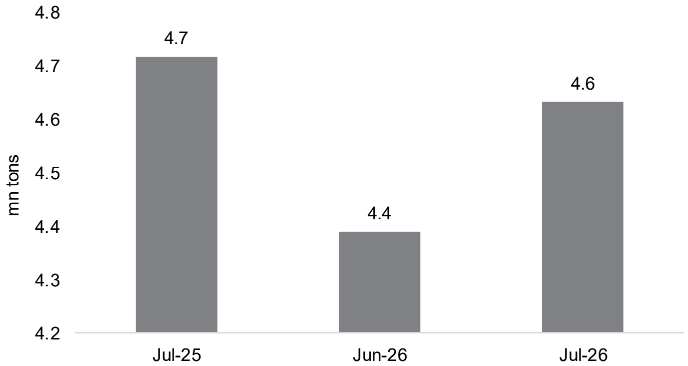
Saudi Cement Sector

Chart Book

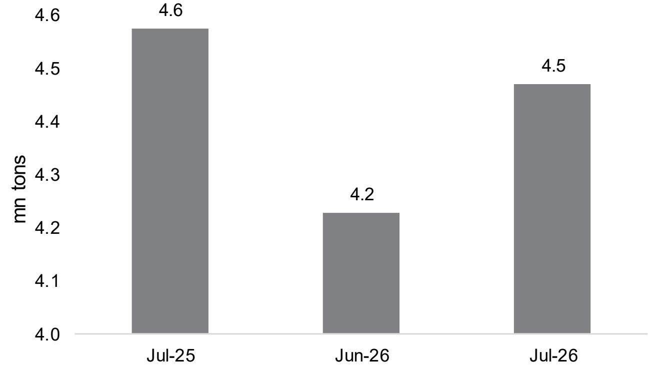
10 August 2026

Cement volume performance for the month of July 2026

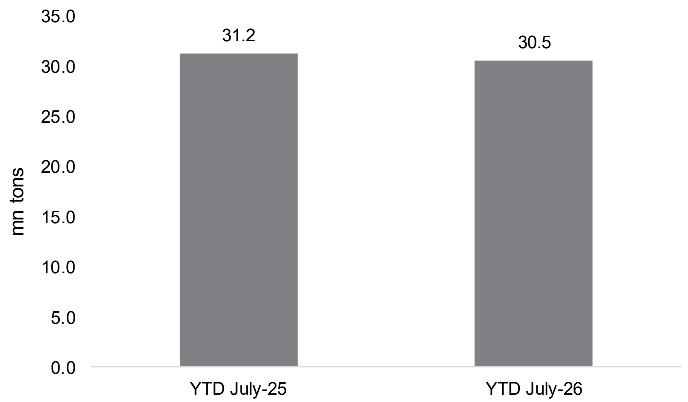
Total Cement Volume



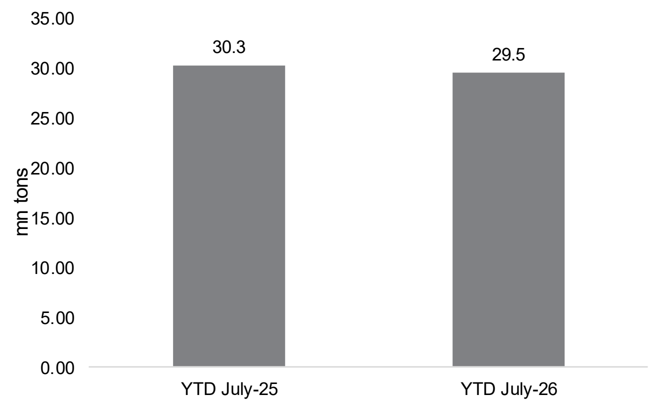
Domestic Cement Sales



Cement Sales (YTD)



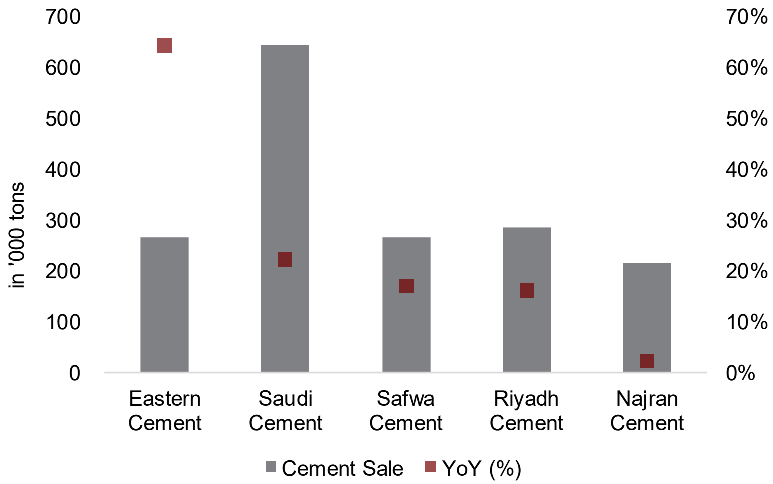
Domestic Cement Sales (YTD)



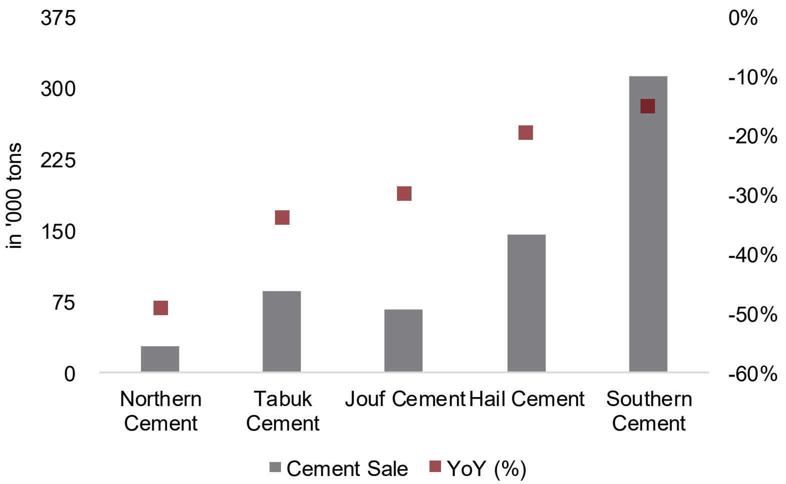
- Overall cement sales for the month of July - 26 decreased by 1.8% YoY, but increased 5.5% sequentially.
- Domestic sales for the month were down 2.3% YoY, but up 5.7% MoM.

Top performers for the month…

Top performers



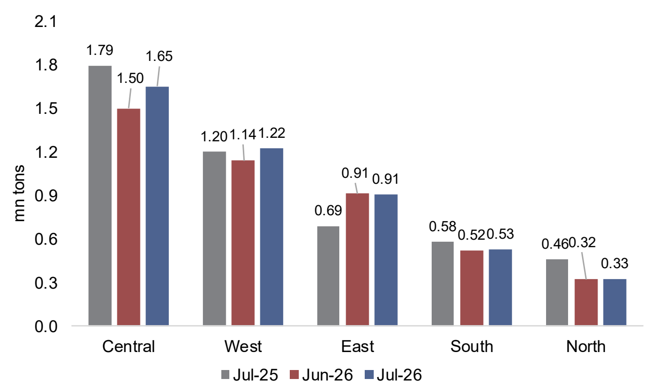
Underperformers



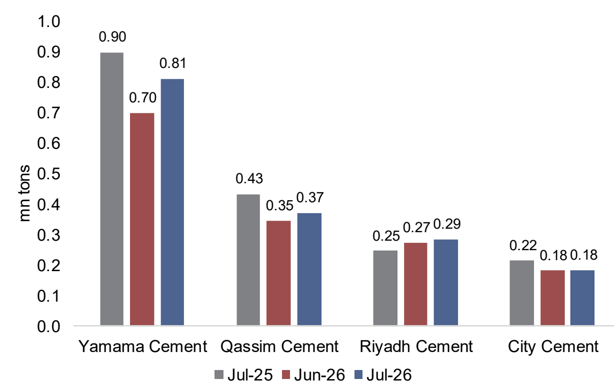
- Eastern Cement (+64%), Saudi Cement (+22%), Al Safwa (+17%), Riyadh Cement (+16%), and Najran Cement (+2%) were the top-5 performers for the month of July-26.
- Northern Cement (-49% YoY), Tabuk Cement (-34%), Jouf Cement (-30%), Hail Cement (-19%), and Southern Cement (-15%) were the top-5 underperformers for the month of July-26.

Regional trend in cement volumes…

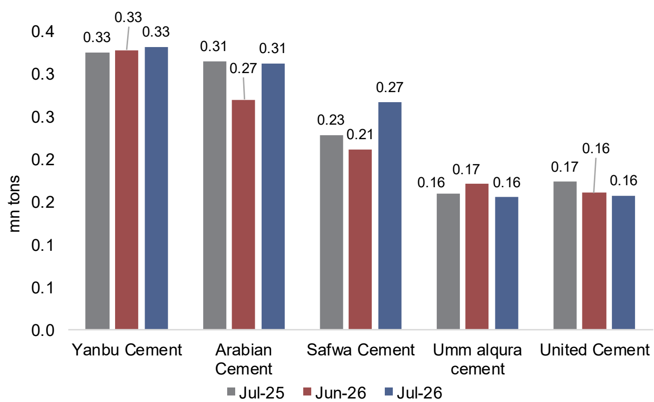
Regionwise cement sales



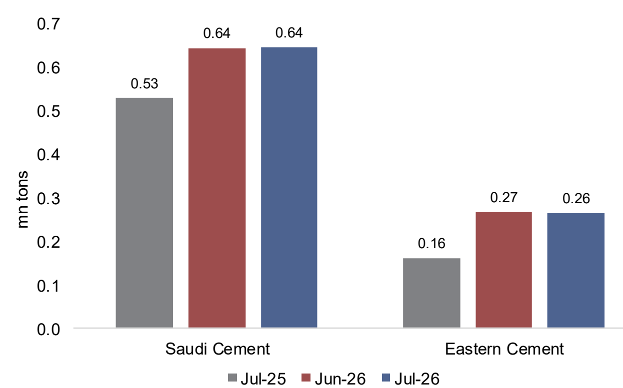
Central Region Cement Sales



Western cement sales



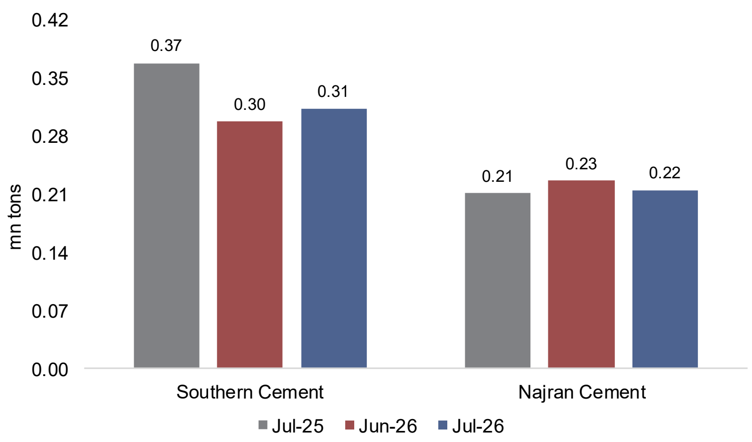
Eastern cement sales



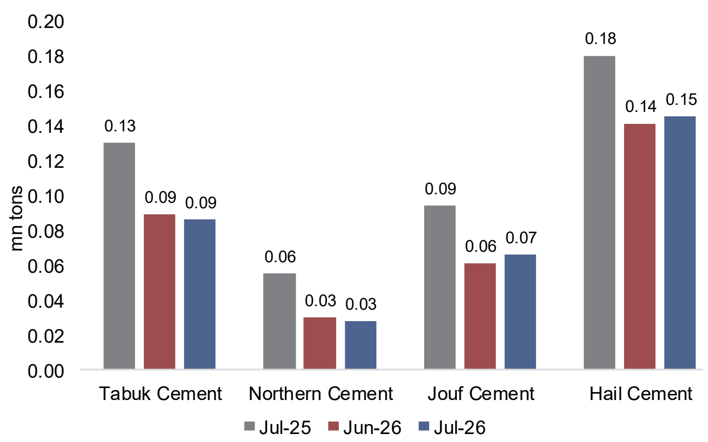
- Cement sales showed mixed performance across regions during the month.
- The Central region reported a 7.9% YoY decrease in cement sales.
- The Western region reported a 1.8% YoY increase in volumes.
- The Eastern region reported an increase in volume of 31.8% YoY.

Regional trend in cement volumes (contd.)...

Southern cement sales

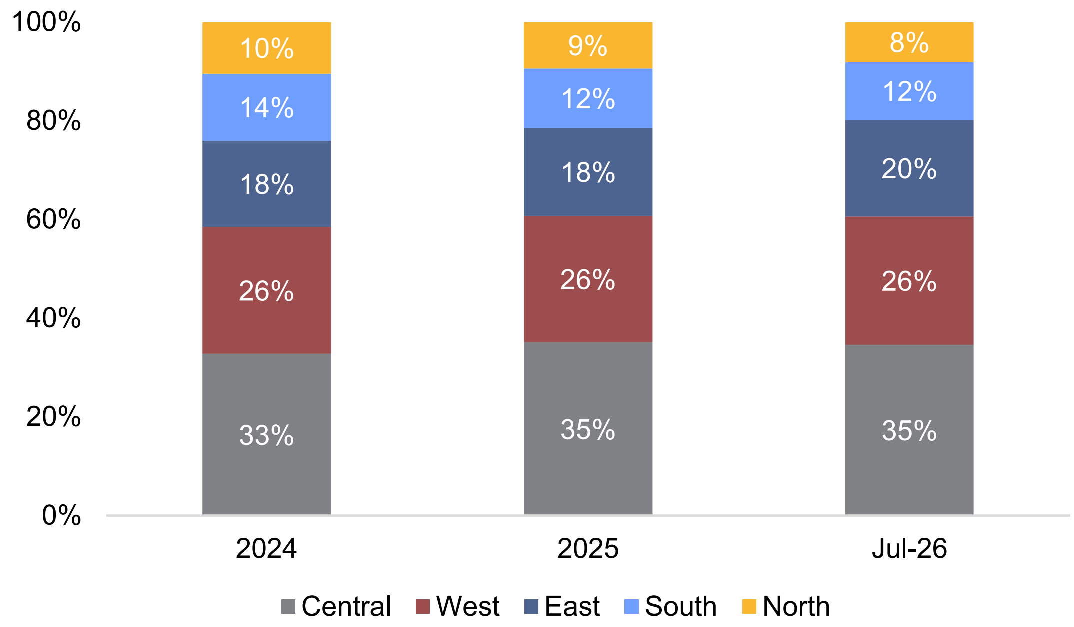


Northern cement sales



- Cement volumes in the Northern region reported a decrease of 29.2% YoY, while the South reported a decrease of 8.8% YoY.

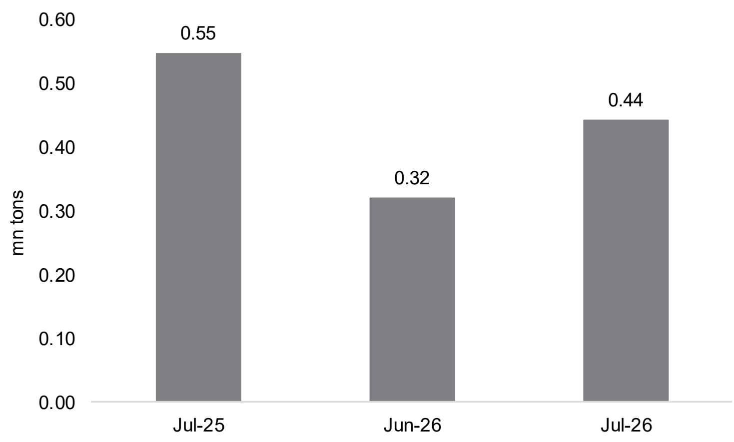
Cement market share – Region-wise…



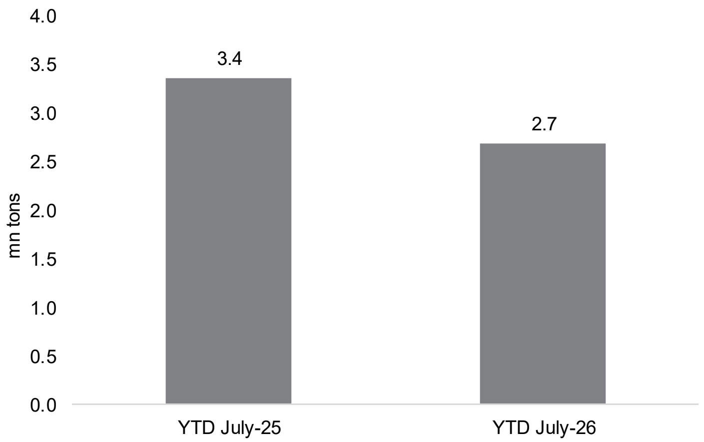
- The Central region and the Western regions accounted for c.60% of the cement volume.
- The market share of East has improved, while North reported a fall and South managed to maintain its position.

Clinker sales performance

Clinker sales



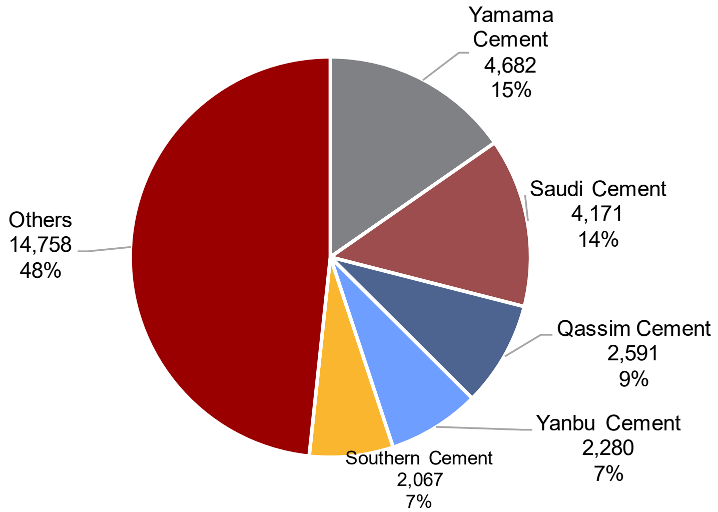
Clinker sales - YTD



- Clinker sales reported a 19.2% YoY decrease in volumes, with the same being made entirely of exports.

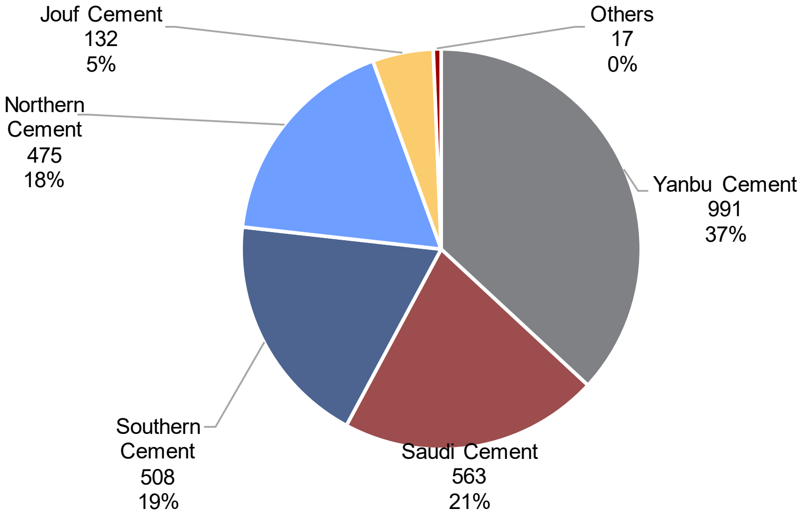
Cement and clinker market share

Cement market share: July - 26



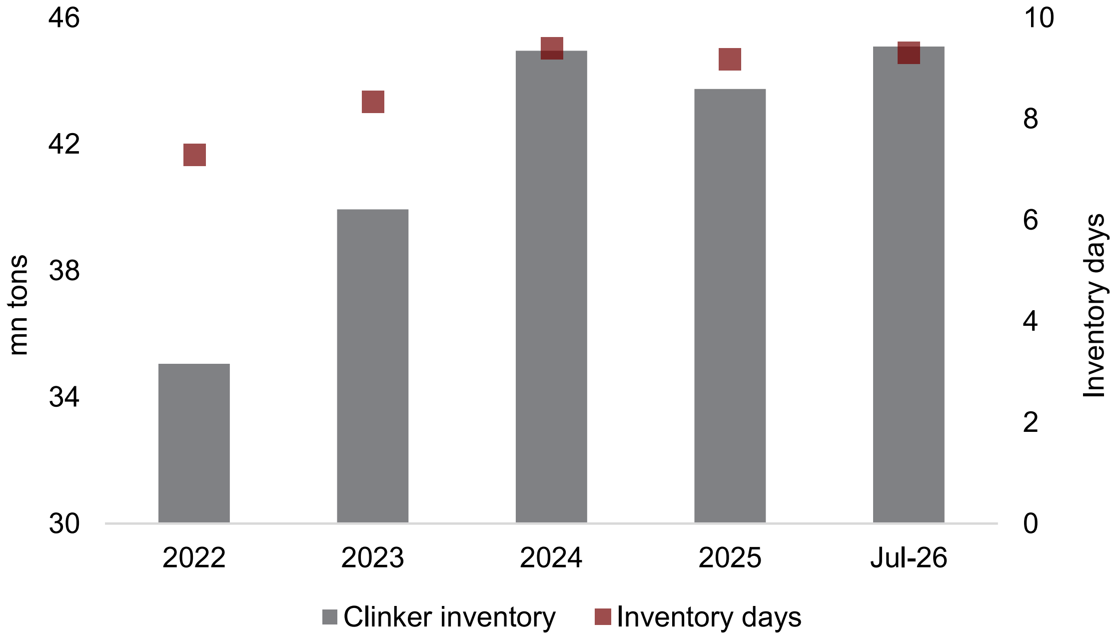
Volume in 000' tons

Clinker market share: July - 26



- The top-5 players contributed over 50% of cement sales, whereas clinker sales are largely concentrated with the top-5 players.

Clinker inventory levels



- Clinker inventory increased from 43.8mn tons in Dec-25 to 45.1mn tons in July-26.
- The industry had inventory of c.9 months of clinker production (based on TTM production).

Key contacts

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