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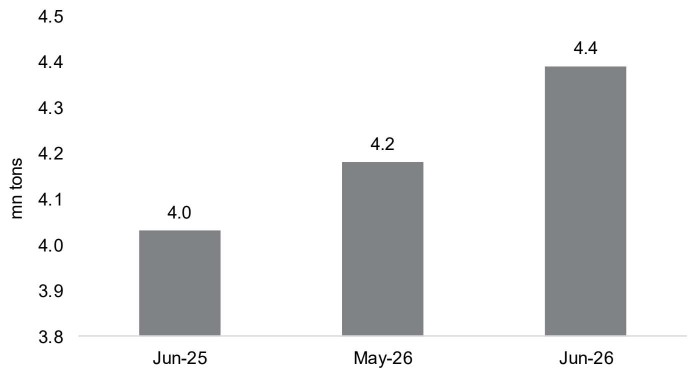
Saudi Cement Sector

Chart Book

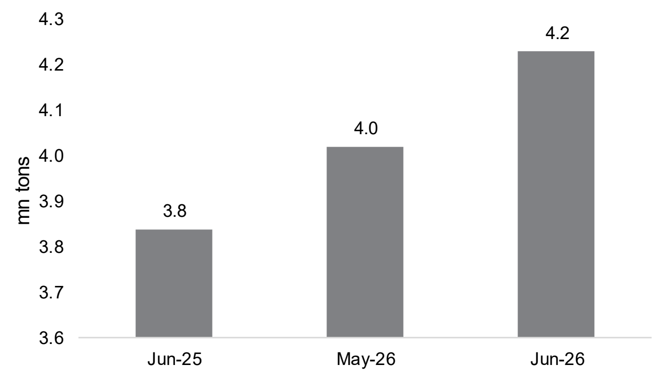
08 July 2026

Cement volume performance for the month of June 2026

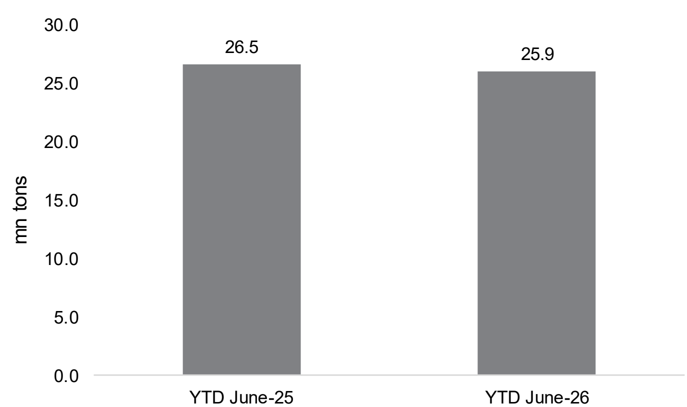
Total Cement Volume



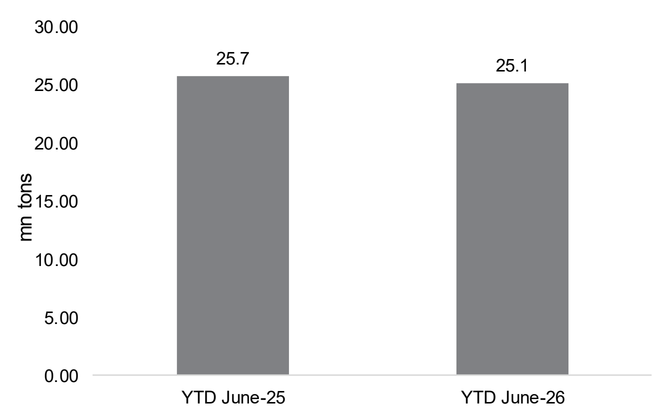
Domestic Cement Sales



Cement Sales (YTD)



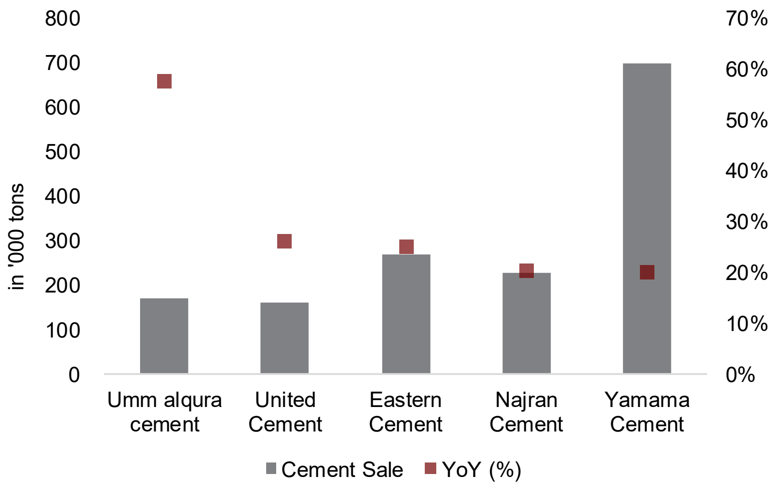
Domestic Cement Sales (YTD)



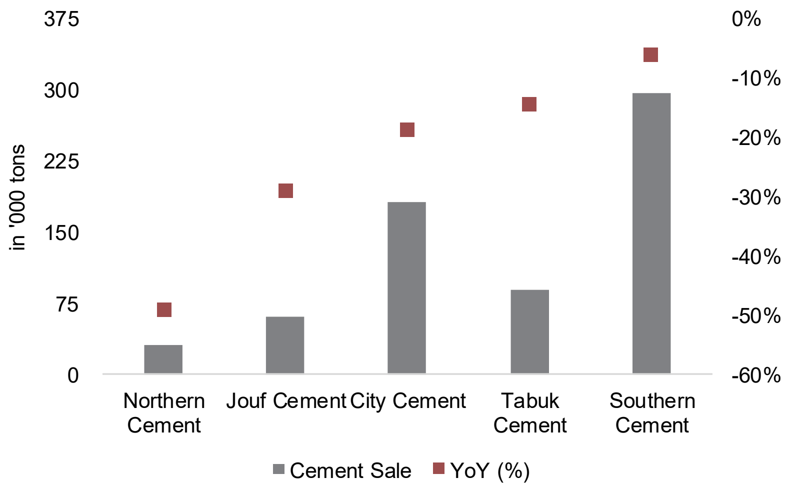
- Overall cement sales for the month of June – 26 increased by 8.9% YoY and 5.0% sequentially.
- Domestic sales for the month were up 10.2% YoY and 5.2% MoM.

Top performers for the month…

Top performers



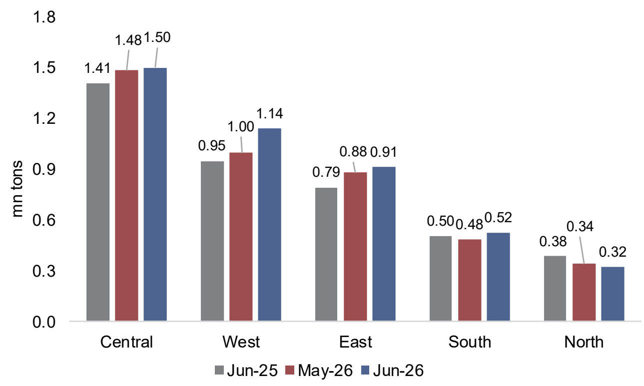
Underperformers



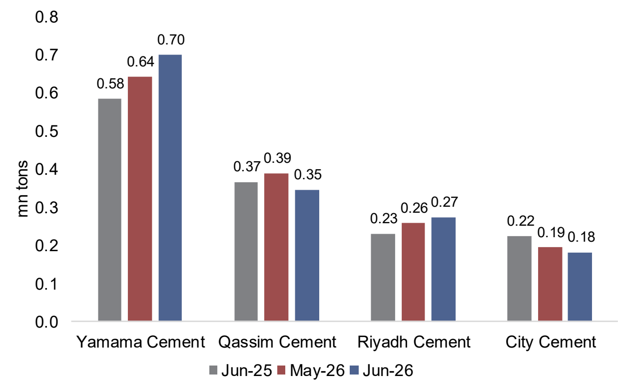
- Umm Alqura (+57%), United Cement (+26%), Eastern Cement (+25%) Najran Cement (+20%), and Yamama Cement (+20%) were the top-5 performers for the month of June-26.
- Northern Cement (-49% YoY), Jouf Cement (-29%), City Cement (-19%), Tabuk Cement (-14%), and Southern Cement (-6%) were the top-5 underperformers for the month of June-26.

Regional trend in cement volumes…

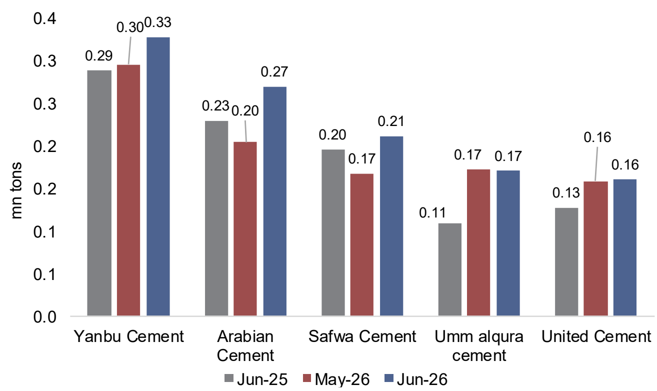
Regionwise cement sales



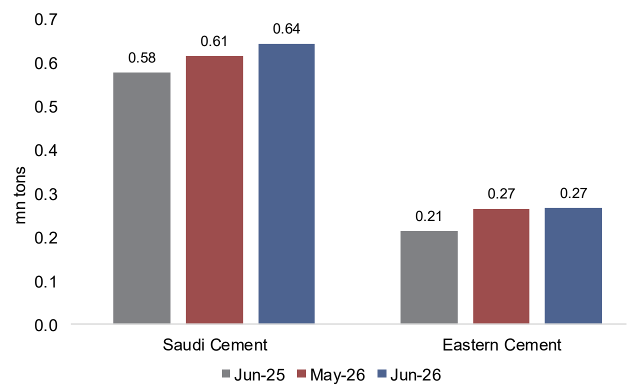
Central Region Cement Sales



Western cement sales



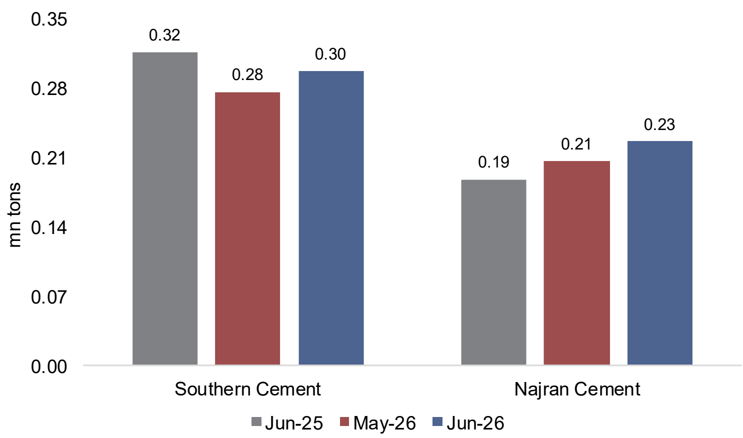
Eastern cement sales



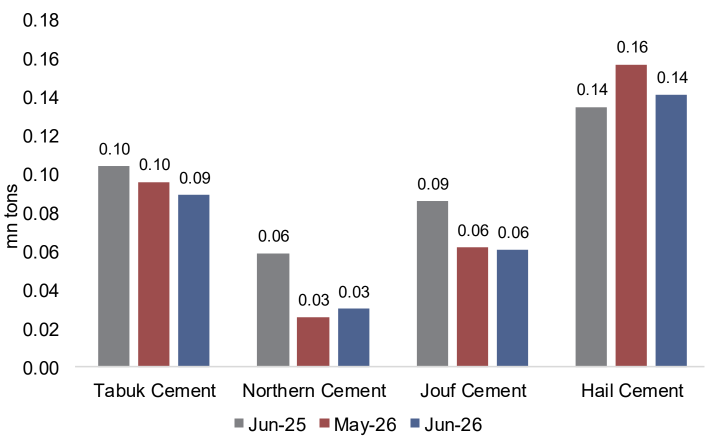
- Cement sales were up across most regions during the month.
- The Central region reported a 6.7% YoY increase in cement sales.
- The Western region reported a 20.1% YoY increase in volumes.
- The Eastern region reported an increase in volume of 15.0% YoY.

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

Southern cement sales

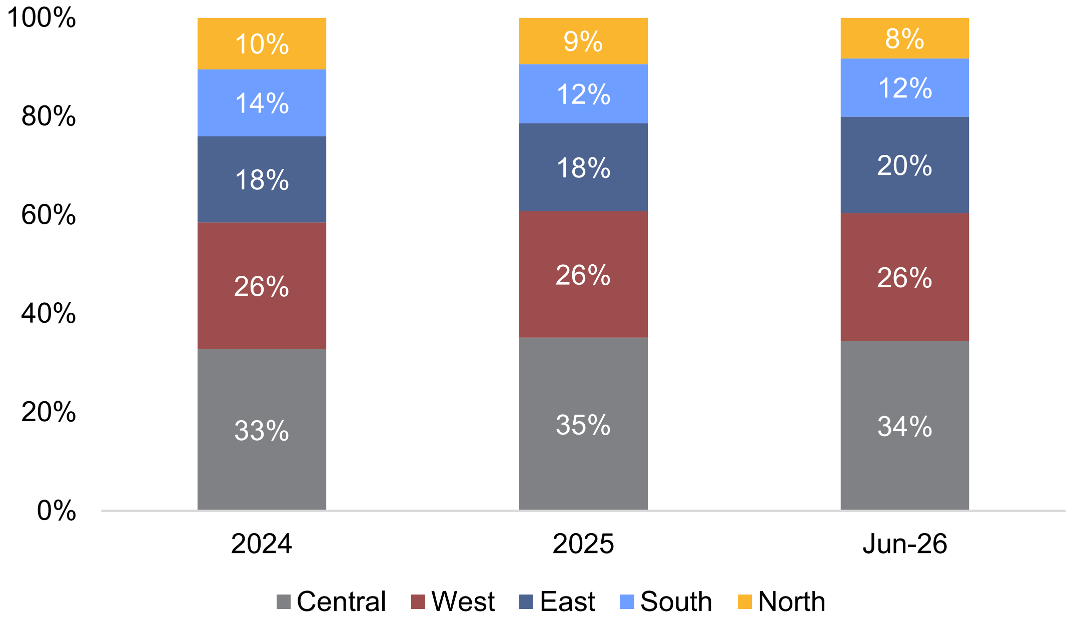


Northern cement sales



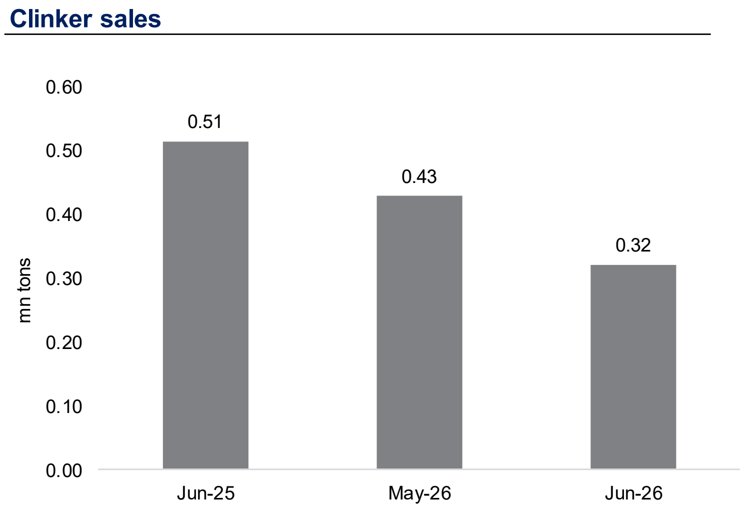
- Cement volumes in the Northern region reported a decrease of 16.4% YoY, while the South reported an increase of 3.8% YoY.

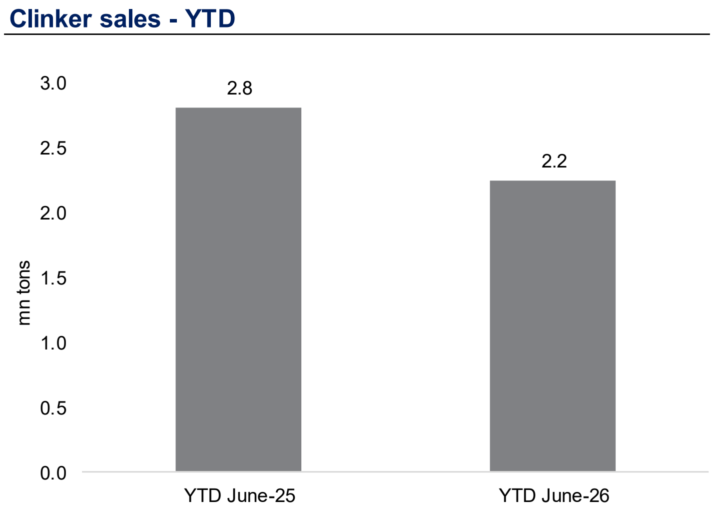
Cement market share – Region-wise...



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

Clinker sales performance

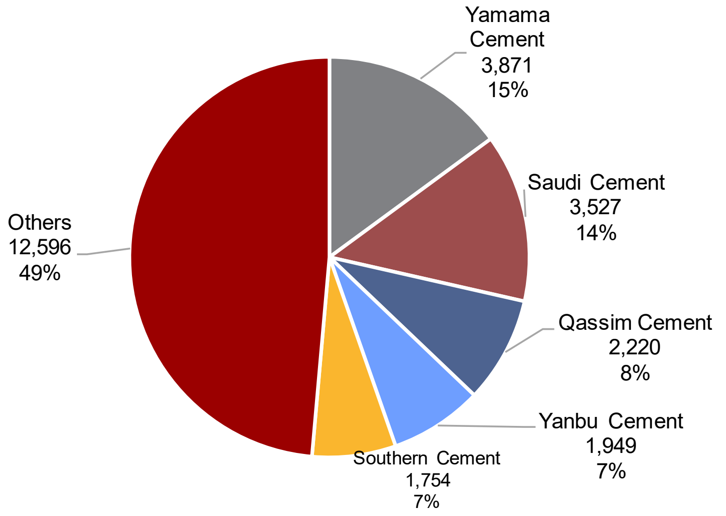




- Clinker sales reported a 37.5% YoY decrease in volumes, with the same being made entirely of exports.

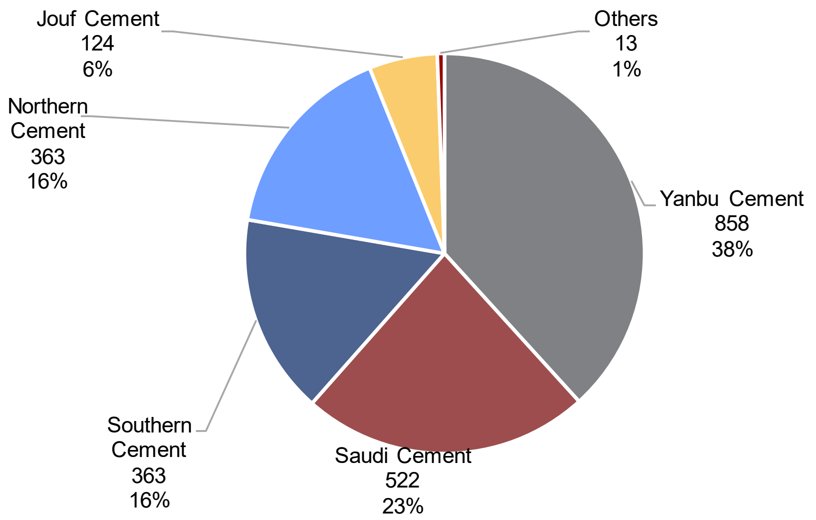
Cement and clinker market share

Cement market share: June - 26



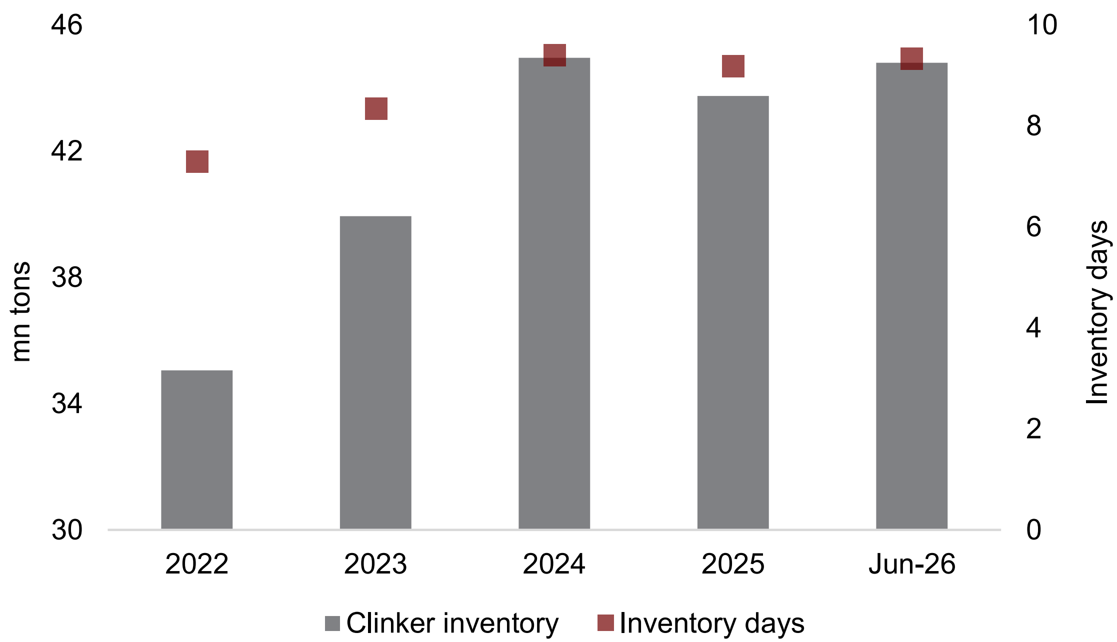
Volume in 000' tons

Clinker market share: June - 26



- The top-5 players contribute approximately 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 44.8mn tons in June-26.
- The industry had inventory of c.9 months of clinker production (based on TTM production).

Key contacts

Research Team

Joice Mathew
Sr. Manager - Research
E-Mail: joice@usoman.com
Tel: +968 2476 3311

Manna Thomas ACCA
Research Associate
Email: manna.t@usoman.com
Tel: +968 2476 3347

Contact Address
P. O Box: 2566; P C 112
Sultanate of Oman
Tel: +968 2476 3300