

Daily Bulletin

October 7, 2026

Cement sales recorded at 4.4 mn tons in September 2026, fell 8.3% YoY

Saudi Arabia's cement sales were reported at 4.4 mn tons in Sep-26, compared to 4.8 mn tons in same period last year, down 8.3% YoY. Total sales fell 3.2% MoM from 4.6 mn tons in Aug-26. Domestic sales declined to 4,350k tons during the month from 4,705k tons last year, down 7.5% YoY, while export sales fell to 89k tons from 137k tons, down 35.0% YoY. The export share of total sales eased to 2.0% in Sep-26 from 2.8% a year earlier.

On domestic sales, 11 companies out of 17 posted an annual decline. Among the top decliners, Hail Cement's local sales fell to 110k tons from 181k tons, down 39.2% YoY, followed by Tabuk Cement, which decreased to 87k tons in Sep-26 from 137k tons, down 36.5% YoY. Northern Cement volumes dropped to 27k tons from 38k tons a year earlier (-28.9% YoY). Among the larger players, Qassim Cement fell to 300k tons from 397k tons, down 24.4% YoY. Meanwhile, six companies posted growth, led by Eastern Province Cement at 282k tons, up 12.8% YoY, followed by Najran Cement at 207k tons, up 8.4% YoY, and Umm Al-Qura Cement at 171k tons, up 6.2% YoY.

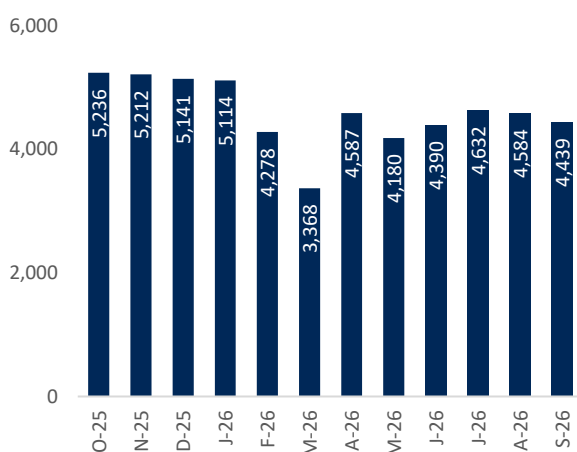
Yamama Cement remained the market leader with 19.1% of local sales, followed by Saudi Cement at 11.6% share and Southern Cement at 6.9%. Yamama Cement's share has risen steadily from 15.9% in May-26, while Qassim Cement's has slipped to 6.9% from 9.7% over the same period.

On the export side, four companies exported a combined 89k tons in Sep-26, down 3.3% from 92k tons in Aug-26 and well below the 162k tons recorded in July. Saudi Cement was the largest exporter at 34k tons, followed by Najran Cement (28k tons), Al-Jouf Cement (20k tons) and Eastern Province Cement (7k tons). Saudi Cement's exports have dropped sharply from 120k tons in May-26.

For 9M26, domestic sales reached 38.4 mn tons, down 2.7% YoY from 39.4 mn tons in 9M25. Eastern Province Cement (+22.4% YoY), Umm Al-Qura Cement (+21.6% YoY), and United Cement (+9.2%) were among the key gainers, while Al-Jouf Cement (-43.3% YoY) and Northern Cement (-41.0% YoY) recorded the largest declines. In 3Q26, total sales stood at 13.7 mn tons, down 3.5% YoY from 14.1 mn tons in 3Q25.

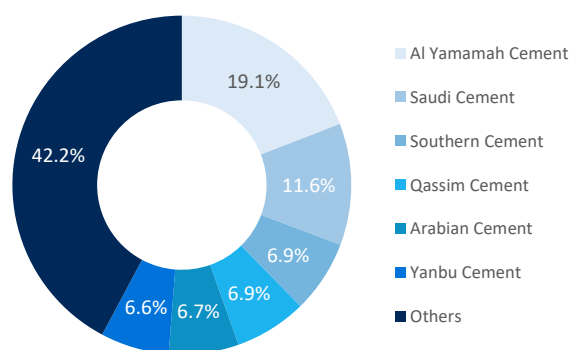
Clinker production fell to 4.4 mn tons in Sep-26 from 4.7 mn tons in Sep-25, down 4.6% YoY. Clinker inventories rose to 45.8 mn tons from 44.2 mn tons, up 3.6% YoY. Clinker exports increased to 549k tons during the month from 436k tons in Aug-26, up 25.9% MoM, led by Southern Cement (250k tons), Saudi Cement (174k tons) and Northern Cement (118k tons).

Total monthly cement sales ('000 tons)



Source: Yamama Cement, anbc research

Market share as of Sep-26



Source: Yamama Cement, anbc research

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