How is a Cement company working with marketing within the construction industry?
- A case study on an ambitious cement company

Authors:
Jing Li
Petter Schultz

Supervisor:
Svante Andersson
Acknowledgement

This thesis would not have been possible without the support from many people. Firstly, we would like to thank Mr. Ronny Andersson, market development manager at Cementa and professor in Structural Engineering at Lund University, for the interview and to Mr. Jan Gånge for getting us in touch with Ronny.

Thanks to Mr. Svante Andersson, our supervisor, for your patience and the useful guidance.

At last, we would like to give our appreciation to our families and friends for going through the whole process together with us.
Abstract

The object of this thesis is to provide some ideas as to whether it is possible for a company to create value for every segment within the construction industry.

The motivation of the thesis is to shed some light on an area, which gets very little attention in marketing literature, which is the B2B commodity industry.

The company studied is Cementa, a Cement producer at core, but with the ambition to be a player in every segment throughout the construction industry. They have developed their own model to represent the different segments. The company is considered an interesting and rewarding object for a case study due to this remarkably ambitious goal as well as the company's high market share. The areas of literature which are considered are:

· Supply chains
· Value chain and competitive advantage
· Segmentation
· Networks
· Relationship marketing

It is concluded that a lot of the literature supports Cementa's strategy and theories correspond well with Cementa's actions. Hence it seems theoretically possible for a company to create value for every segment of the construction industry, granted the company builds up the right context over a long time including the right suppliers, network and, particularly, trust with other actors and customers and a good reputation.
# Table of Content

1. Introduction .................................................................................................................. 6
   1.1 Background ............................................................................................................. 6
       1.1.1 Some Swedish national history .................................................................. 6
       1.1.2 Motivation ...................................................................................................... 6
       1.1.3 The company ................................................................................................. 6
   1.2 Focus ....................................................................................................................... 7
   1.3 Research question .................................................................................................. 7

2. Literature review .......................................................................................................... 8
   2.1 Business to Business (B2B) in general ................................................................. 8
   2.2 Supply chains ......................................................................................................... 8
   2.3 The Value System and competitive advantage .................................................... 9
   2.4 Segmentation ......................................................................................................... 11
       2.4.1 Segmentation Variables ............................................................................... 11
       2.4.2 Approaches of segmentation ....................................................................... 12
   2.5 Networks ................................................................................................................. 14
       2.5.1 Network theories ......................................................................................... 14
       2.5.2 The ARA model ........................................................................................... 14
       2.5.3 Inter-organisational market orientation ...................................................... 15
   2.6 Relationship marketing ........................................................................................ 16

3. Method ........................................................................................................................ 18
   3.1 Choice of main approach .................................................................................... 18
   3.2 Interview ................................................................................................................. 18
   3.3 Use/role of literature ............................................................................................. 18
   3.4 Inductive or deductive? ....................................................................................... 19
   3.5 Limitations ............................................................................................................. 19

4. Empirical findings ....................................................................................................... 20
   4.1 The company .......................................................................................................... 20
   4.2 The interviews and Ronny Andersson ................................................................. 20
   4.3 The industry ........................................................................................................... 21
   4.4 The markets ........................................................................................................... 21
   4.5 The Competitive Advantage .............................................................................. 21
   4.6 The Model ............................................................................................................. 22
   4.7 Cementa's strategy and goal ................................................................................ 23

5. Analysis ....................................................................................................................... 25
   5.1 The Cement model ............................................................................................... 25
   5.2 Supply chains ........................................................................................................ 26
   5.3 Value chain ............................................................................................................ 26
5. 4 Segmentation ..........................................................................................................................27
5. 5 Networks................................................................................................................................28
5. 6 Relationship marketing .........................................................................................................29
5. 7 Challenges ................................................................................................................................29
  5. 7. 1 Foreign competition ........................................................................................................29
  5. 7. 2 Technical changes ...........................................................................................................30
  5. 7. 3 Saturations .......................................................................................................................30
  5. 7. 4 Economic environments .................................................................................................30
  5. 7. 5 Trade-off ..........................................................................................................................31

6. Conclusion ..................................................................................................................................32

7. Limitations ..................................................................................................................................32

8. Suggestions for further research ...............................................................................................33
1. Introduction

1. 1 Background

1. 1. 1 Some Swedish national history

The demand for cement surged in connection with the "million programme" (miljonprogrammet) in 1965-1975. Sweden decided that at least one million new residences should be built around that time. This meant that the number of Cement factories grew rapidly. The million programme was followed by an industry crisis around 15 years later, reducing the number of factories to a fraction of what it was, with only the 3 factories at Malmö, Öland and Gotland remaining. The crisis was the result of a housing market bubble-burst in the early 90's, among other things. In the early 90's economical crisis, the Swedish government set the interest rate at 500% in order to stave off massive capital flight as well as keep in line with the EU currency cooperation system at the time. Political crisis in Russia and war in Jugoslavia did not help the European economic situation either. The efforts to control the Swedish crown eventually had to be given up, after costing the country huge amounts of money. The situation created by this cost happening in combination with the facts that some people took their funds out of Sweden while others had increased their savings; meant that the last thing anyone was thinking of was spending any money in Sweden and much less taking any loans during the astronomical interest rate time. This meant that expensive projects such as construction industry projects were very rare. This is what hit the cement industry so hard that only the 3 factories would remain.

1. 1. 2 Motivation

The authors feel that the marketing, which gets the most attention, both academically and otherwise, is the marketing activities practiced by those big companies in big industries that everyone knows of and uses such as Audi or IKEA. We would like to shine a light on one of the areas, which are not visible to the public but are still a big part of marketing throughout the world.

We hence chose to do a case study on a cement producer. Cementa is a boring B2B commodity and not something one would think about when hearing the word "marketing". However cement producers, of course, do market themselves in the B2B scene and marketing is an important area for them. The industry of cement is complex as it is the most fundamental building material.

Very few studies of this type have been carried out, and there is clearly a gap in the literature when it comes to analyzing a B2B commodity company in the way done in this study.

1. 1. 3 The company

The company in question is HeidelbergCement Sweden AB a.k.a. Cementa; Henceforth referred to as Cementa. What make this type of company interesting are mainly two things:

- Cement producers in small countries, such as Scandinavian or Baltic countries, often have very large market shares. Market shares of 80-90% are not uncommon (Ronny Andersson).
- Cementa, in its dominant role, is attempting to spread its influence across the whole construction industry, servicing as many segments as possible. See focus below.
1. 2 Focus

The main focus of the essay is to look at how Cementa create value in this industry and how they work with marketing to stay the position they are at.

This will be viewed through the following theoretical approaches:

- Supply chains
- Value chain and competitive advantage
- Segmentation
- Networks
- Relationship marketing

Cementa is in a industry which seems far away from the researchers of marketing. The authors think it is important to look at the industry as a whole and how the value is created. Thus, the supply chain and value chain are chosen to discuss in this article.

Cementa works with a wide range of segments in the cement industry; network is usually tied with this type of B to B business. As a result, the authors choose to look the theories regarding segmentation, networks and relationship marketing.

1. 3 Research question

How is a Cement company working with marketing in construction industry?
2. Literature review

2.1 Business to Business (B2B) in general

Textbook theory suggests that in a B2B environment like that of Cementa, customers are few (and hence also individually important), large and demanding. Customers demand information and often also specifically customized products (Kotler & Keller, 2006, p. 211) cooperation often emerges in several areas including logistics, R&D and long-term deals. Often companies buy from the same companies as they are selling to (ibid). All of these things mean that relationships must be developed and maintained.

2.2 Supply chains

Supplier selection: The selection of suppliers is often done through careful comparison studies using weighted criteria over desired supplier characteristics (Kotler & Keller, 2007, p. 225). The choice of characteristics and relative weighting will vary greatly "with the type of buying situation" (ibid) so it is impossible to generalize. Examples of common criteria include (ibid):

- Price
- Supplier reputation
- Product/Service reliability
- Supplier flexibility

Periodical performance reviews of the supplier will take place and can be done in various ways, including (Kotler & Keller, 2007, p. 227):

- Contacting the end users for evaluations
- Rating the supplier statistically using a weighted score from a set of criteria.
- Calculating total costs of sub-par performance and using it as a basis to renegotiate prices.

Many companies use incentive systems within the supply chain, quite similar to salesmen's provisions (ibid). This is a method aimed at increasing performance and also loyalty and strengthening the relationship.

Research shows that trust building within the supply chain often is key for healthy long-run relationships and increased vertical coordination within the supply chain tends to increase value for both parties (Kotler & Keller, 2007, p. 228).

This takes us beyond the simple weighted criteria mentioned above and suggests that suppliers should also be chosen based on their ability and willingness to engage in a mutually beneficial cooperation and to what extent coordination and trust can be achieved to further the relationship. In this sense, supply chain management is really closely related to relationship marketing.
2.3 The Value System and competitive advantage

To understand competitive advantage, it is important to look at not only the firm, but the many discrete activities a firm performs in designing, producing, marketing, delivering, and supporting its products. An advantage may stem from the raw material, the logistics, or the distribution system. All the activities of a firm can lead to a relative competitive result (Porter, 1985, p. 33).

A value chain is a “systematic way of examining all the activities a firm performs and how they interact is necessary for analyzing the sources of competitive advantage” (Porter, 1985). It is introduced to analyze the source of competitive advantage by disaggregating a firm into its strategically relevant activities in order to understand the behavior of costs and differentiation. A firm performs these strategically important activities more cheaply or better than their competitors to gain competitive advantage (ibid). “Firms produce, sell and deliver products through value chains” (Porter, 1985, p. 233).

The firm value chain is one part of the whole value system. It differs according to the complexity of the industry in which the firm performs. Serving only one particular industry allows a firm to be more focused and gain advantage in cost or differentiation compared to competitors. Larger benefits can be exploit also through broader scope internally or the coalitions with other partners. Shown in figure 2.3, the value chains may be more complicated and eventually lead to competitive advantage through interrelationship (Porter, 1985, p. 34).

![Figure 2.3 The Value System](Porter, 1985, p. 35)

All activities in every firm can be represented using a value chain. The value chain of a firm gives information not only the strategy but also on its history, its culture and its approach of achieving the
goals. Even in the same industry, the value chains of two different companies may be distinct (Porter, 1985, p. 36).

Figure 2.4 The Value Chain (Porter, 1985, p.37)

The activities are identified into two big categories: primary activities and support activities. “Primary activities, listed along the bottom of Figure#, are the activities involved in the physical creation of the product and its sale and transfer to the buyer as well as after-sale assistance... Support activities support the primary activities and each other by providing purchased inputs, technology, human resources, and various firmwide functions. The dotted lines reflect the fact that procurement, technology development, and human resource management can be associated with specific primary activities as well as support the entire chain.” (ibid)

The primary activities are (Porter, 1985, p. 39):

- Inbound logistics: activities associated with receiving, storing, and disseminating inputs to the product.
- Operations: activities associated with transforming inputs into the final product form.
- Outbound logistics: activities associated with collecting, storing and physically distributing the product to buyers.
- Marketing and Sales: activities associated with providing a means by which buyers can purchase the product and inducing them to do so.
- Service: activities associated with providing service to enhance or maintain the value of the product.

The supportive activities are (Porter, 1985, p. 40):

- Procurement: purchasing inputs such as materials, supplies, and equipment.
- Technology Development: technologies to support creating value
- Human Resource Management: activities involved in the recruiting, hiring, training, development and compensation.
- Firm Infrastructure: activities including general management, planning, finance, accounting, legal, government affairs, and quality management.
By figuring out the activities involved in a firm in creating value, a firm may develop competitive advantage either by modifying individual chain activities or reconfiguring the value chain. A cost advantage can be achieved by reducing the cost of one or more chain activities or by reforming the value chain; a differentiation advantage can be achieved by increase the uniqueness of any part of the value chain or reconfiguration.

2.4 Segmentation

According to Bonoma and Shapiro (in Kotler & Keller 2007, p. 259) the B2B market can be segmented according to the following variables:

- **Demographic**: which industries, size of companies and geographic areas to serve?
- **Operating variables**: What technologies to focus on, what user/nonuser status and what amount of service-requirement type customers to serve?
- **Purchasing approaches**: what type of purchasing system, what power structure, which extent of existing relationships, which general purchasing policies and which purchasing criteria should companies have that we focus on?
- **Situational factors**: what urgency level, what product applications and what order sizes should we focus on?
- **Personal characteristics**: Do we seek companies with similar values, risk levels and loyalty levels?

Wind (1974) stated that market segmentation is on of the most fundamental concepts of marketing. “Market segmentation is defined as the process of dividing the total market into a number of smaller, more homogeneous submarkets, termed market segments” (Danneels, 1996).

While similar to consumer goods market segmentation, industrial segmentation is more challenging and difficult and critical of understanding due to the complexity of industrial markets, products, and usage systems (Bonoma & Shapiro, 1983, p. 1). However, the segmentation of consumer markets has received more attention in the literature than industrial market segmentation (Verhallen, Frambach, & Prabhu, 1998). Market segmentation tends to focus on the marketing activities, however, industrial segmentation combines buyer behavior with the behavior of costs (Porter, 1985, p. 232). Wind and Cardozo (1974) are one of the first to use term industrial segmentation. In their work, they pointed out the lack of academic support for industrial marketers to follow. Bonoma and Shapiro (1983, p.4) wrote “a careful search of the literature shows that only a few articles have had any direct important impact upon the development of industrial market segmentation”.

2.4.1 Segmentation Variables

The literature suggests many types of portfolios of variables that could be used to divide the market. In Bonoma and Shapiro’ book (1983, p. 7), where they suggest nest approach, marketer segment markets based on:

- Demographics
- Operational variables
- Purchasing approach
- Situational factors
- Personal characteristics
Porter suggests the variables in industrial segmentation from a value chain’s point of view: (1985, p. 238)

- Product variety
- Buyer type
- Channel
- Geographic buyer location

2.4.2 Approaches of segmentation

Wind and Cardozo (1974) -- Two stages approach
According to Wind and Cardozo (1974), the industrial markets may be segmented in two stages. The first stage is macrosegmentation, i.e. segmenting the market on the macro level. It is based on the characteristics of the buying organization and the buying situation. The second stage is dividing the macrosegments into microsegments, with the bases of characteristics of decision-making units.

The implementation starts with a given generic product/service, identifying on the characteristics such as:

- Size
- Usage Rate
- Application of product
- SIC category; end market served
- Organization Structure
- Location
- New vs. Repeat purchase

Considering the corporate objectives and resources, select a set of “acceptable” macro segments. Further, move to the second stage dividing the segments based on the DMU(decision-making unit) characteristics, i.e.

- Position in authority and communications networks of firm
- Personal characteristics
- Perceived importance of purchase
- Relative importance of specific determinants of buying decision
- Attitudes toward vendors
- Decision rules

Finally complete the selection based on costs and benefits associated with reaching the segment.

Bonoma and Shapiro (1983) -- Nest approach
Bonoma and Shapiro based the Nest approach on the two-stage segmentation. The model, figure 2.1, provides more explicit method of implement the strategy.
The strategy pursued by a firm is one of its most important operating variables, it is bound to directly influence their industrial buying behavior. Bonoma and Shapiro suggest such “a basis for segmentation would be favorable in terms of costs and complexity” (Verhallen et al 1998).

According to Bonoma and Shapiro (1983), “If segmentation is done well, marketers can make intelligent choices about the fit between their company and products and the needs of each segment. Those segments that fit the company’s capabilities are chosen for penetration. Those segments that do not suit the company’s capabilities are left for others to serve.” Focus is also crucial in segmentation (Wind & Cardozo, 1974; Bonoma & Shapiro, 1983; Porter, 1985).

The classic models of segmentation emphasize on the strategy. It assumes that the whole market exists out there; the purpose of segmentation is to find the right target consumers and provide the right products. Following Wind and Cardozo’s model, it is similar as following a route to find the destination; while in Bonoma and Shapiro’s model, it is like using a nest to catch the fish of the most suitable size. Based on the two studies, Simkin (2008) suggests a six-stage approach to achieve market segmentation.

In the recent decade, scholars have paid more and more attention to the opposite group in the business world, the consumers. Freytag and Clarke (2001) claim, “The essence of the marketing concept is that the best way to address the customer is by satisfying their needs and wants”. They argue that many author rather see segmentation “a tool for resource allocation” than “a statistical analysis technique”. However, they believe that “both points should be addressed at the same time”.

Verhallen et al (1998) suggests strategy-based segmentation of industrial markets by taking account of the unobservable characteristic such as organizational strategy. Freytag and Clarke (2001) add customers’ intention as a segmentation base, they believe it is very important to have interaction between suppliers and customers. Harrison and Kjellberg (2007) bring the phenomena into discussion that the groups of customers are not “out there” and “market segmentation becomes an
emergent and interactive process of shaping that which is to be described”. The close collaboration with early users has made the markets possible from networks.

2. 5 Networks

2. 5. 1 Network theories

According to Iacobuccik (1996, in Prenkert, 2003, p.15), marketing deals with relations, and networks theory excels at analysing relational phenomena. Hence, network theory can be applied to many parts of the marketing science. Strategic alliances bring a number of positive outcomes such as higher return on equity, better return on investment, and higher success rates (Booz-Allen & Hamilton, 1999).

Prenkert looks at an approach, which is referred to as the "markets-as-networks perspective" (Prenkert 17). This approach was developed from studies of industrial markets (Prenkert 17). Companies researched have typically been large players in the "forestry, wood, paper and paper-pulp" industries (Prenkert 18), which are relatively similar to cement firms.

Network theory can be related to relationship marketing through the concept of trust. In a single relationship, trust is a key element (Elg, 2008). A network can reduce or avoid paying several types of transaction cost, for instance, searching for information about potential partner (Gulati, 1995). Inter-organizational networks can generate corporate social capital in terms organizational reputation, status, and brand name recognition (Leenders & Gabbay, 1999, Todeva & Knoke 2005). Successful strategies require basic trust, mutual understand and sharing of decision-making (Todeva & Knoke, 2005). Networks facilitate interacts between actors, interaction involves exchanges. These exchanges include information and social exchanges as well as business exchanges. These exchanges create mutual knowledge and this creates trust (Håkansson & Johansson, 1993 in Prenkert, 21), which helps commitment and long-term relationships. According to Prenkert (22), interaction is seen as the process through which cooperation is achieved.

2. 5. 2 The ARA model

The different functions of the network can be organized into 3 main layers (Prenkert, 27):

![Figure 2.2 The ARA model](Image)

Activities: The links between the activities of the different actors in the network, making them
relevant to each other.

Resources: The dependencies on each other's resources among the actors in the network, making them interdependent.

Actors: The bonds between the actors that arise from information exchange, social exchange and a history of satisfactory business exchanges, creating trust and commitment.

Figure 2.3 Explanation to ARA Model

The ARA areas "work together well as both analytic processes and insight generation" and they "both enable and constrain freedom" in the supply chain relationships. The model is thus used to illustrate the 3 main areas in which both the relevance and relative power of network partners are determined. In complex industrial networks, "a constant watching and evaluation process will be required" (De Lurdes Veludo & Doulas K, 2004).

2. 5. 3 Inter-organisational market orientation

Elg looks at inter-organisational market orientation in food market supply channels. He recognizes that knowledge in the area is lacking, in spite of the fact that "interorganizational relationships represent a significant source of competitive advantages" for many firms (Hunt & Lambe 2000 in Elg, 2008). His findings include that an inter-firm focused market orientation "can become an important element in a channel's development of unique market values" (Elg, 2008).
Elg also stresses that this type of orientation is not a unique phenomenon, but must be supported by the right context, which is build on a network consisting on long-term committed relationships with a high degree of trust (Elg, 2008).

2.6 Relationship marketing

The focus of this thesis was chosen to be on relationship marketing over traditional marketing theory. This is because The relationship marketing theory has a focus on commitment to long term relationships, trust and satisfaction; which are all things that the interviewee Ronny Andersson has stressed as key factors in the business and for Cementa. Davis (2007) has also done an extensive study on the relevance of relationship marketing to the construction industry and the authors are drawing a lot upon his findings in supporting the arguments presented in this thesis since the ideas of Cementa's strategy and the reasoning of the authors are both supported by the findings in Davis’ study.

Relationship marketing theory is also superseding traditional theory in the business context (Gummesson, 1999 in Davis 2007, p. 1). According to Davis (2007, p. 1) the traditional marketing theory fails to take into account the complex interrelationships within the traditional marketing mix as well as not applying as well as relationship marketing does to the service side of industries.

Some main benefits of applied relationship marketing have proven to be increased client retention and value-adding product benefits (ibid). In order to successfully build a relationship, the firm is required to possess 4 attributes: A desire to continue a business relationship in the long run, a belief that the partner is trustworthy as well as an effective performer, an understanding of each other's problems and a belief that the committed relationship will add value to the end product (ibid).

It can be said that the essence of relationship marketing is to incorporate the creation of customer value with a sharing of that value with the key stakeholders (Davis 2007, p. 2). This requires the different actors in the supply chain to work together in the design and alignment of processes throughout the industry in order to maximize value (ibid). Even though applied relationship marketing inevitably creates a very complex web of relationships, both upstream and downstream, literature indicates that every firm can benefit from relationship marketing, even though it should be said that some sectors may benefit more than others (Davis 2007, p. 1). One such sector is the construction industry.

Davis (2007, p. 3) identifies the main focuses of relationship marketing from literature as: Focus on client retention, orientation on product benefits, Long-run time scale, high emphasis on customer service, high customer commitment, high customer contact and the fact that quality is everyone's concern. These focuses can be organized into three main variables:

Commitment: This is the desire to continue the relationship. Davis (2007, p. 3) identifies 3 dimensions of commitment: Duration, durability and ongoing consistency. According to Morgan and Hunt (1994, in Davis 2007, p. 3), the "long term orientation toward a relationship" is based on an emotional bond and the conviction that "remaining in the relationship will yield higher benefits than terminating it".

Trust: "The belief that a party's word or promise is reliable and a party will fulfill its obligations in an exchange relationship" (Dwyer et al, 1987, in Davis 2007, p. 3). Davis (2007, p. 3) identifies
from various literature, three main characteristics for trust: Willingness to customize, i.e. the willingness to supply specialized components, products or equipment; confidential information sharing and Relationship length.

Satisfaction: The various parties in a relationship are kept satisfied by continually analyzing and servicing each other's needs (Davis 2007, p. 4). Evidence from literature stresses the importance of keeping partners continually satisfied in order for relationships to remain intact (Davis 2007, p. 3).

Successful relationship marketing in the construction industry requires good supply chain management. Davis (2007, p. 11) identifies from literature that writers on supply chain management emphasize that strategically designed, committed relationships with continuous learning are requirements of success.

Davis (2007, p. 13) concludes from his study that relationship marketing indeed adds value to the whole supply chain and enables sharing of that value and benefiting both client retention, length of relationships and the product. This increases overall satisfaction in the supply chain. Davis (2007, p. 13) also notes that the application of relationship marketing functions best "in an environment that facilitates realignment of processes in support of value creation". Later on in this thesis it will be described how Cementa indeed engages in many cooperative efforts in order to develop the products and processes in order to create value throughout the whole industry as well as society, both by increasing efficiency and by reducing environmental impact. Davis (2007, p. 14) also finds that collaborative, ongoing innovation is often a positive outcome of relationship marketing.
3. Method

3.1 Choice of main approach

A case study approach was chosen for this study for these reasons:

Stake (1995, in Bryman & Bell, 2007, p. 62) says case study research is concerned with the complexity and particular nature of the case in question. It is generally agreed that in order to validate a single-case study, that case should be exceptional. The authors feel that Cementa is indeed an exceptional case, primarily due to its high market share, but also due to its unique wide focus. This “unique case” (Yin, 2003, in Bryman & Bell, 2007, p. 64) helps to make the study interesting and worthwhile.

One of the authors has worked with the company before and has personal connections high up in the company. This gives great advantages in studying the company in an insightful way. Getting in touch with the company and setting up interviews is not a problem. It is also easy to get the required information.

The interviewee, Ronny Andersson, is not only working with the marketing of the company, but is also a Professor who has supervised many dissertations of similar type to this one in the past. Hence, he knows exactly what we need for this case study. This meant that the authors got not only an interview, but also a lecture-type presentation of the company as well as guidelines and suggestions as to how it could be used in the thesis.

A single-case study is essentially a way to gain detail by sacrificing reliability, replicability and validity (Bryman & Bell, 2007, p. 58). In this case, the authors feel that the advantages of the case-study approach outweigh the disadvantages and this approach was thus chosen over others.

3.2 Interview

The qualitative interviewing is usually very different from interviewing in quantitative research (Bryman and Bell, 2007, p. 473). The two major types of interviewing in qualitative research are unstructured and semi-structured interviewing. “There may be just a single question that the interviewer asks and the interviewee is then allowed to respond freely, with the interviewer simply responding to points that seem worthy of followed up” (ibid, p. 474).

The interview with Mr. Ronny Andersson was a typical unstructured interview. As mentioned earlier, Mr. Andersson works as a professor in Lund University, he knows the information the authors need and what is possible to share with us.

3.3 Use/role of literature

Bryman and Bell (2007, p. 97) list the proper ways of reading the literature including taking good notes, developing critical reading skills, etc., which are very helpful for the authors when dealing with the large amount of literature.

The model suggested by the company is discussed in conjunction with generic theory and articles in order to attempt to answer the research question. This allows for comparing the model with
literature, as well as suggesting areas of improvement to the model or possibly making suggestions for changes to it.

3. 4 Inductive or deductive?

Deductive research is when a hypothesis is deduced and subsequently scrutinized using research (Bryman & Bell, 2007, p. 11). In inductive research, the hypothesis is the outcome of the research (Bryman & Bell, 2007, p. 14).

This study is built on a combination of deductive and inductive research. It is deductive in the sense that the authors use their business background and known theories in formulating hypotheses as to how Cementa work and achieve their goals; and then compare the interview results about how Cementa work to what is expected from theory.

It is inductive in the sense that, by analyzing Cementa's activities and model, the authors try to refine the existing theoretical explanations and come up with the best possible theoretical answer to whether and how a firm is able to create value for every segment.

3. 5 Limitations

The main limitations arise from three sources:

Lack of time, study scope limits and information restrictions. These are the main limitations of most studies.

Only one company is being studied: this means that there is no other example to compare with, comparisons must be done with what theory can be deduced and what scenarios can be expected from literature.

The company cannot give out any sensitive information: This is arguably the single greatest weakness. Companies never give up their secrets in order to provide more numbers in order to make the study more accurate.

The study is limited to thesis-size and there is limited time and resources to put in: This generally limits the comprehensiveness of the study in every sense.
4. Empirical findings

The empirical findings are collected and abstracted from the interview with Ronny Andersson and the material given by Cementa.

4.1 The company

The company in question is HeidelbergCement Sweden AB a.k.a. Cementa. What makes this type of company interesting is that cement producers in small countries, such as Scandinavian or baltic countries, often have very large market shares. Market shares of 80-90% are not uncommon (Ronny Andersson).

Cementa are not willing to give the exact market share in the Swedish market but it is somewhere between 80-90% (Ronny Andersson). Cement in the ready-mixed concrete, prefabricated concrete products and aggregates sectors have leading market positions in Sweden.

Cementa are also unable to name their biggest customers and most important partners or, in fact, any information about their business with different companies. This information is strictly confidential. No customer knows about what business Cementa is doing with another customer. This confidentiality, which has been kept over the many years Cementa has existed has granted them a well established trust and favourite reputation within the industry and this is one of their main sources of competitive advantage (Ronny Andersson).

Cementa is part of Heidelberg Cement Group. A large concern based in Germany.

4.2 The interviews and Ronny Andersson

Ronny Andersson is the market development manager at Cementa. He is also a professor in Structural engineering at Lund University.

The interview was also the first meeting between the authors and Ronny Andersson. It was therefore an informal discussion where the authors introduced the thesis idea, discussed what type of information would and would not be available and how the information exchange would proceed henceforth.

The intended outcome of this meeting was merely to get introduced to Ronny Andersson and come to an agreement regarding further interviews and what type of information would be available. However Ronny Andersson, being a professor, took upon him to present the company and its marketing situation from the angles interesting to us. He gave a lecture type presentation which included a lot of information on the company, industry and the different production process phases, market segments and positioning. This enabled the authors to do substantial amounts of writing and eliminated the need for a second interview, which was the original plan. The fact that Ronny Andersson is a professor, who has supervised many thesis students before, has helped immensely both in the sense that he knows exactly how to express the company information in a way suitable for thesis students and that he has acted, in some ways, as a second supervisor for the authors.
4. 3 The industry

Cement is a key infrastructure industry. The material is the most widely used in construction. People in the cement industry distinguish between two kinds of factories. Inland and coastal. This is because the main cost in the industry is truck transportation. Boat transportation is hugely favourable. This means that everyone is attempting to minimize their truck mileage. Thus the inland factories have local monopolies. Being coastal means reaching other markets but also means that the competition can reach you (Ronny Andersson). Sweden is unique in the sense that all major factories are coastal, at the areas: Öland, Gotland and Malmö. Setting up a new factory is of course a huge investment and moving one could cost as much as building a new one, so the location of a factory has a major impact.

4. 4 The markets

The home market is the target for around 90% of Cementa's sales. The export markets hence account for around 10% and the exporting is handled through concerted efforts with the mother company, as opposed to the home market. Up to 1990, the focus was almost exclusively on the home market but in later years, a significant export market has emerged (Ronny Andersson).

Customers always have multiple tenders; and the big customers - such as Skanska, who are building throughout Europe and the world, can easily set up their own silos and import cement from just about anywhere in the world if they wish (Ronny Andersson).

4. 5 The Competitive Advantage

“Many companies in the refractory industry may have the impression that cement manufacturers only look at price when deciding which refractories to use, and which refractory supplier to chose. While price is an important factor, there are many other important influences on who gets the job, and what gets installed in the cement factory at the end of the day.” (Peter F. Parkes, 2008)

The fact that big customers are able to set up silos and order large quantities of cement from wherever the cement is the cheapest means that there is risk of harmful price competition in the industry. However Cementa enjoy a competitive advantage, which is not based on price. Instead they are adding value to the product in any way they can.

But how do you add value to a product such as Cement? Cement is an old product, which has existed for close to 200 years, with few changes to the product (Ronny Andersson). The actual name of modern cement is Portland cement, patented in 1824. Cementa are able to add value in the following ways:

**Product:** Cement and concrete can be adapted according to specific criteria, which vary with different construction types, time plans, purposes and locations. Cementa have the skills and knowledge to develop a product with the right specs for the customer.

Examples include: Faster drying concrete, concrete, which does not freeze in the winter and non-vibration concrete.
**Delivery:** The coastal factories have self-service depots, which are open 24/7 where a customer can dock the boat and fill up on Cement. This grants 2 advantages:

1. One might suspect that construction projects are carefully planned and the material requirements can be calculated far in advance. In reality, according to Ronny Andersson, actors in the business often suddenly realize that they need huge amounts of concrete fast. This makes the 24/7 self-service delivery systems very valuable.

2. Cementa are able to promise a 100% delivery on time guarantee.

**Technical Customer Service:** This refers to a sort of consulting service. Cementa have knowledge relevant to many stages of a construction project, which they can sell. This includes not only product development and market knowledge but also construction knowledge such as energy efficiency in buildings, stability and so on.

**Market development:** Working together with customers to introduce new products and norms to the market.

**Trust:** Customers that work with Cementa enjoy complete confidentiality. I.e. no customer has access to information about another customer's dealings with Cementa.

**Reputation:** Cementa promise a lot, according to Ronny Andersson they promise so much that if they were a newer company customers would shake their heads and laugh, but customers trust that they will keep their promises due to Cementa being an old firm with a strong reputation. Cement also help build a sustainable cement industry by reducing the use of fossil fuels when producing clinker, and add supplementary materials in the cement.

4.6 The Model

The construction industry is a very broad one. It contains many different stages where different companies can specialize. This also means that there are many different approaches as to how this industry can be segmented. Ronny Andersson presents the approach used by Cementa, a model of the two main processes that a building goes through from planning to usage:

In construction projects there are two processes, each with their own value added chain.

- The product phase: Raw material → Cement production → Transports/Delivery → Additional raw materials and concrete manufacture → Logistics → Casting → Post-casting treatment → Recycling

- The Design phase: Program stage → Design → Construction → Usage

These two processes intersect as shown below:
Figure 4.1 The Cementa Model

The big customers, such as Skanska, are present on both axes. This means that Cementa has to be present on both axes as well. According to Ronny Andersson, these two intersecting processes hence roughly represent Cementa's value chain.

4.7 Cementa’s strategy and goal

The goal of Cementa is to serve every customer segment throughout the both axes. Ronny Andersson draws a circle around the entire model to underline his point.

These two intersecting axes with circles corresponding to the areas covered by Cementa is the basic market segmentation model used by the company. The challenge, according to Ronny Andersson, is to stay competitive at each specific segment while at the same time covering as many segments as possible. It is particularly difficult to compete with competitors who offer only the basic product at a low price when Cementa has to stay sharp in so many value-adding areas, areas whose importance is difficult convey to some customers who are tempted by competitors' low prices. For there are indeed many different customers with different demands, and Cementa's policy and fine reputation hinges upon the fact that they never turn down a customer. This is why the reputation is so crucial to keep, because with such high promises, a high credibility is needed to match.
Ronny Andersson presented the authors with a draft for an R&D and sustainability report, in order to show how these efforts relate to their marketing, positioning and cooperative efforts.

Bo-Erik Eriksson, R&D manager:

"Cement and concrete can definitely be developed further, there is unused potential".

Cementa is working to counter the emission of carbon dioxide, both in the production stage but also in the operational stage (where the most carbon dioxide comes into being), by improving building techniques.

Three main R&D paths:

1. Production and own product development: Mainly reduction of carbon dioxide emission.

2. Joint projects with others in order to develop new properties and functions of concrete. Cementa has already developed an additive for concrete which makes it able to decompose nitrogen oxides in the air among other things. There is research ongoing to find new functions of such additives as well as to increase the thermal inertia of the concrete (i.e. decreasing the heat loss from buildings).

3. Construction technique improvement: Concrete carbonises, i.e. the surface absorbs carbon dioxide over time. Cementa is researching how to develop building techniques to maximize the utility of this fact.

Partners: The concrete institute, the environmental institute, different departments of the technical universities of Sweden. Financing of doctoral projects. Many R&D projects of Cementa's are joint ones with many other institutions, including a current project to develop simple sensors for measuring heat development and maturity of newly-cast concrete.

Ronny Andersson, market development manager:

Cementa has the basic idea that in order to secure their role on the market in the long run they need to participate in as many projects as possible, improving the whole construction scene for benefit of themselves, the industry and society. Cementa are taking sides against sub-optimization in the industry and are actively transferring knowledge to entrepreneurs and consultants about energy efficiency in constructions.
5. Analysis

5.1 The Cement model

The different circles represent the areas of the industry that various types of companies encompass.

Red: The traditional Cement company. Focus on production and delivery on the core product only. As discussed in the literature, more and more firms in modern times move away from this strategy and expand their scope.

Blue: A Concrete firm, involved in every stage of the concrete life cycle, but not in the design/construction process. A common company type.

Yellow: A construction firm, involved in every stage of the building, from planning, programming, design, architecture and engineering to construction and even to service during the actual usage. However there is no involvement in the raw material process. Another common company type.

Green: Where Cementa attempts to be, encompassing every stage of both processes. They are not fully there yet, and to state exactly where they are now would be impossible without access to confidential data. However, they are well on their way and have a clear strategy for how to get this quite unique position.
5.2 Supply chains

According to Kotler P, Keller K L (see literature review), supplier selection is one of the most important supply chain-related decisions. It is clear that Cementa, with its focus on long-run committed relationships, is choosing suppliers very carefully and through comprehensive processes.

According to the literature, the methods used in supplier selection differ largely between companies, but there are a universal 4 main criteria that form the basis of supplier selection:

- Price
- Supplier reputation
- Product/Service reliability
- Supplier flexibility

Without going into detail, it can be said that Cementa emphasize criterion number 2 and 3, Reputation and reliability of the supplier over price and flexibility.

The literature also emphasizes loyalty and trust a lot, when it comes to building a successful supply chain, which corresponds perfectly to Cementa's strategy.

5.3 Value chain

Value chain theory suggests that competitive advantage can be appreciated and its sources identified by looking at all the discrete activities of a firm and also at how these interact. However, isolating all of Cementa's activities and obtaining information which is detailed enough to deduce the main sources of competitive advantage would be impossible since such information is confidential. This is the general problem with the value chain model. It requires such detailed information on a company's activities that it can only be fully applied by the company itself or a trusted consultant at best, not an independent researcher. The authors could not go depth in analyzing Cementa by using Porter’s (1985) value chain.

The generic Value chain has divided the primary activities, of which the goal is to offer the customer a level of value that exceeds the cost of activities, thereby resulting in a profit margin, into 5 parts:

Inbound logistics include receiving, storing, inventory control, transportation scheduling. To have higher margin in this section, factories are usually set up right next to the place where the raw material is found. The main raw materials used in the cement manufacturing process are limestone, sand, shale, clay, and iron ore (Essroc, 2010). The largest quarry of limestone in Europe is Stora Alvaret on the island of Öland and the second largest is found on the island of Gotland, both of which are located in Sweden (wikipedia, 2010). The two main plants of Cementa are in these two areas.

Operation includes packaging, assembly, equipment maintenance, testing and all other value creating activities that transform the inputs into the final product. Cementa as a part of the Heidelberg Cement Group, possess the best technology in Cement industry, which is a key competitive advantage to Cementa. New technology such as using fly ash in cement not only lowers the emission of CO2, but also help produce cement that has low heat during setting and low early
Formulating concrete cracking potential. The concrete they make is stable self-compacting, providing easy form filling and reinforcement imbedding. High density and chloride penetration/corrosion resistance are contributed with high cement qualities.

Outbound logistics activities required to get the finished product to the customers: warehousing, order fulfillment, transportation, distribution management. Cementa have a strong market position and distribute their cement to a large number of terminals and silo stations scattered along the coast in their region. Ship transport to the terminals ensures an efficient logistics. The silos also act as a logistic buffer – in total the silos has a storage capacity of 750,000 tons (Syversten, 2010).

Marketing and Sales activities associated with getting buyers to purchase the product including channel selection, advertising, promotion, selling, pricing, retail management, etc. As part of the third biggest Cement company in the world, Cementa have a strong reputation in cement and concrete making which helps them in getting customers. The technology Cementa have is also a guarantee in keep the market stable. Cementa work with the customers to introduce new products and norms to the markets. The involvement of the customers ensures the interaction between Cementa and the clients, which makes the clients a steady part of the value chain. The endeavour in finding solution in deducing emission of carbon dioxide help the environment and earn good reputation.

Service activities are maintaining and enhancing the product’s value, including customer support, repair services, installation, training, spare parts management, upgrading, etc. Cementa not only provide the product but also the knowledge in the construction area. The consulting services Cementa provide to their clients include product development, market knowledge, energy efficiency, stability and so on.

The theory emphasizes that generating cost or differentiation advantages as a result of highly focused activities is not the only way to go. Competitive advantages can also stem from the nature of complex interrelationships, which is of course the route Cementa has taken.

5.4 Segmentation

As Bonoma and Shapiro state (see literature review): Industrial market segmentation is much more complex that consumer market segmentation.

Consumer market segmentation is about choosing a set of criteria and then identifying consumer groups according to those. On an industrial market you must not only consider what business areas to target, but the nature of the companies that operate in those areas which you must thus target. Hence, industrial segmentation is a lot about issues relating to relationships and supplier selection and it is difficult to analyze industrial segmentation as a separate topic area.

The most common methods in segmentation are Wind and Cardozo’ (1974) two-stage approach or Bonoma and Shapiro’s (1983) nest approach. In the two-stage approach, first you apply macro segmentation: identifying the major segments and their characteristics. Then you divide those segments into micro segments by considering the details such as decision-making units and attitudes. The Bonoma and Shapiro (1983) claims the “subtle hard-to-assess” variables are located in an inner nest can pinpoint a segment precisely. By segmenting with the “nest”, marketers can
find the segments they are able to set foot on and make profit of. They all remind marketers of that organizations can choose to ignore markets if they wish. Whereas, in Cementa’s case, the company thrives to control all segments possible in the market in both production and value adding. As the biggest company in Sweden, they have the resources needed to deal with all segments.

Cementa do not exactly apply segmentation as an isolated concept. They have a model of the different stages in the different processes throughout the industry. In a sense these stages are segments, because they are functions. In order to choose partners they apply supplier selection and assess the opportunities for fruitful long-run relationships and they have a policy to never turn down a customer to the greatest possible extent. This leads to an interactional approach of segmentation.

This means that traditional segmentation theory applies poorly to Cementa, and the concepts related to segmentation are better examined using Cementa's own model, supply chain theory and relationship theory.

5. 5 Networks

According to the markets-as-networks perspective, cooperation is achieved through the processes of exchange and interaction (see literature review). Cementa's goal of being able to serve every segment of the construction industry thus means that they have to attain as much interaction and, whenever possible, exchange with as many actors as possible. Their network is thus crucial. According to the theory, interaction leads to cooperation which leads to commitment and trust and long run business relationships. The better the network, the more business you get, is the argument.

So, the literature shows that building relationships and networks as extensively as possible throughout the supply chain is beneficial for every body. But why does one single actor need to have a foot in every area? Well it is not necessary per se, but it helps Cementa become bigger, more reputable, more influential and ultimately more successful. In the end, of course, this is what all strategies are all about.

For a company like Cementa, which wants to be as competitive as possible on as many segments as possible, analysing the network opportunities and managing the networks is crucial. This is where a model like the ARA helps to organize the analysis.

The most difficult area for cementa is actor bonds, since this represents the trust and reputation (see model) that Cementa has build up into its main competitive strength

An important example of how they are working with resource ties is their highly flexible delivery, which is possible due to the coastal factories.

Cementa links many activities with both suppliers, customers, and even governmental agencies and universities. They emphasize joint R&D and continuous improvement projects.

The literature also states that in order to attain unique market values by utilizing a network, long-run committed relationships are necessary and must contain a high degree of trust. Interpersonal and inter-organizational trust, is indispensable to reducing the costs of negotiations between partners (Todeva & Knoke, 2005). This is in full accordance with cementa's strategic pursuits.
5. 6 Relationship marketing

A lot of the findings in literature, particularly from Davis (see literature review) support the paths according to which Cementa has developed.

From the literature it was found that strategically designed, committed relationships with continuous learning are requirements of success for firms such as Cementa. This fits Ronny Andersson's description of what is important to retain customers very well. With articcular emphasis on the aspects of trust, confidential information sharing and living up to the reputation.

It was argued in the literature that newer relationship marketing theory supersedes traditional marketing theory in that it better takes into account the complex relationships through which companies work together in an industry. It was also stated that relationship better appreciates how firms take into account stakeholder and partner satisfaction as well as end-customer satisfaction. With Cementa's ultimate goal of being omnipresent in the industry (see Cementa's model) as well as maintaining trust, reputation, never turning down a customer and so forth, all the findings support these claims very well.

Factors that were also emphasized in the theory are value adding product benefits and client retention. This corresponds well to Cementa's many long-term joint research projects and constant development of the core product as well as the markets and uses for the product, the relationships and efficiency throughout the supply chain.

According to the literature, the 3 main areas of relationship marketing are: commitment, trust and satisfaction. These are all at the core of Cementa's strategy.

5. 7 Challenges

5. 7. 1 Foreign competition
It is more surprising to come across some goods made in other countries rather than China. From fast moving consumer goods to high tech products, the Chinese has set it its role as the manufacturer of the global business in almost all industries. At the same time the developing Asian fellows are catching up. A large number of organizations are also seeking producers in countries such as India, Bengal, Indonesia.

Fortunately, China so far has not been a big exporter in cement partly due to the fact that the cost of transportation makes it hard to be profitable. However, the production has definitely reached the top in the recent years. From latest 2003, it has been producing the largest amount of cement each year. In 2008, it was approximately 1400Mt (Cemnet, Global Cement Report, 2008). In the year of 2009, it was 1637Mt according to Cemmbureau (2009), which makes up 54.2% of the world production in 2009. India ranks number two on the production list, together with Indonesia, Thailand and other developing Asian countries makes up 13.4% of the whole world production in cement.

Even though the price war is never Cementa’s concern, the other competitors may learn to add value to their products and be more competitive. Despite the whole model of Cementa is too
expensive to copy, the competitor can be more focus on fewer segments.

As Cement said, the big customers - such as Skanska, who are building throughout Europe and the world, can easily set up their own silos and import cement from just about anywhere in the world if they wish.

5. 7. 2 Technical changes
Cement is still an essential material in making concrete, but in some modern concretes it is no longer the most important material because these concretes are composite materials. Modern concrete which contain more and more often mineral components is more than simply a mixture of cement, water and aggregates (Aitcin, 2000).

As a company specialized in the construction material, they technical change will bring more challenges. More alternative material and technology development will make it possible to require less cement in the construction industry. Cementa is the leading company in this area, to always find a better solution is the obligation of the research and development apartment. Cementa is also active in the world cement forum and in partnership with many institutions to stay at the fron line.

5. 7. 3 Saturations
Aitcin (2000) illustrates the relationship between the consumption of cement and the gross national product per inhabitant. Following the increase of the income, the consumption of cement increases at the same time. Meanwhile, as the income decreases, the amount of cement consumption drops. However, the consumption no longer increases when the living standard reaches a certain level. According to Aitcin (2000), the urbanization process has reached saturation in industrialized countries and the major parts of the infrastructure have been built. From authors’ own experience, there are so little changes happening in industrialized countries compared with developing countries in infrastructure. Take Shanghai as an example, during the four years one of the authors has stayed in the city, construction have been found everywhere, the city has been changing all the time. Conversely, the cities in Europe remain the same for years.

Presently, in industrialized countries, each material is facing a saturated market, and the driving forces only lie in maintenance, replacement and the natural progression. Aitcin (2000) pointes out that the only spectacular expansion of cement market will be in the developing countries.

5. 7. 4 Economic environments
Compared to 2008, production in the CEMBUREAU countries declined by more than 15% in 2009. The effects of the worsening economic environment have stroked in nearly all European countries and negatively affected the cement industry in both mature and fast-growing markets (Cembureau, 2009).

During the year of 2009 in Sweden, estimated decrease of -6% in total construction confirms the significant drop in cement consumption. A sustained increase was registered in the civil engineering sector while the consumption suffered a significant drop in the other sectors. The increase was particularly pushed by investments in new roads, bridges and railways. The non-residential construction sector declined by -13% and the decrease of new residential construction was of -27% (from 22 000 to 16 000 units) (Cembureau, 2009).

Evidence shows that the production and sale in the cement industry is greatly dependent on
Economic environment. It is a challenge to always get prepared for the unpredictable changes in the economic world.

5. 7. 5 Trade-off
According to Ronny Andersson, the biggest challenge with implementing Cementa’s strategy is the inherent contradiction of being present on every segment, while still staying competitive in every segment. This appears to be an impossibility since firms who specialize in only cement production will be both faster and, in particular, cheaper. One of the main points with this thesis is to, using the theories that have been applied, explain how it is possible that customers still prefer Cementa over cheaper, specialised, competitors based on Relationships, reputation, trust etc. as discussed throughout the thesis.
6. Conclusion

The object of this thesis was to provide an overview of how companies in construction industry deal with marketing as it had not been paid so much academic attention.

The authors reviewed possible theories in areas of supply chains, value chains, segmentation, networks and relationship marketing. The company studied was the Cementa, a cement company with the ambition to be present on every segment of the construction industry. An interview was held in order to link the literature with Cementa’s performance.

Some areas of literature has been very applicable to Cementa's strategy. The literature from the Relationship marketing, supply chain and network areas have been found to correspond very well with Cementa's structure and strategy. The value chain and segmentation areas have been difficult to apply due to excessive need for confidential information and poor relevance respectively. However, the authors found to certain degree the linkage.

By looking analyzing with the help from the theories, the authors conclude that marketing in construction industry is indeed important for companies in order to create value in all arenas. But doing so would require large investments of resources including time, capital and knowledge/experience into building up the necessary supremely cooperative and efficient network and supply chain relationships.

Convincing customers to prefer the broadly scoped company over cheaper, specialized actors is an ambitious and difficult goal which would require long-run commitment, trust, information sharing, research and development and reputation building to achieve.

The authors also suggest the challenges Cementa faces by looking at the trend of the whole industry.

7. Limitations

The main limitation of the arguments built up in the thesis is the lack of access to the confidential information that would have been required to fully verify the claims about Cementa as well as fully apply the theories considered.

The main limitations of the conclusion are:

- Only one company has been studied
- No similar previous study has been found by the authors
- No case exists, known to the authors, where a firm has fully been able to attain Cementa's goal of creating value for every segment in the construction industry.
8. Suggestions for further research

The author would like to suggest any further research within this area to focus on mitigating the weaknesses experienced in this one. More companies could be studied to see if the results are consistent. Sensitive data will always be the main problem for the researcher, but the authors suggest getting as much data as possible, including sensitive areas. Possibly, a company could agree to submit sensitive information if they were guaranteed that the study is for academic use only and will not be viewable by the public or anyone with an affiliation to the industry until such time that the information is out of date.
References


De Lurdes Veludo, Maria; Macbeth, Doulas K, “Partnering and relationships within an international network context”, International Marketing Review; 21, 2; (2004) p. 142


Internal document from Cementa: "Draft for Sustainability Report".

Interview with Ronny Andersson, Market Development Manager at Cementa and professor in Structural Engineering at Lund University.


