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# Cement & Concrete Additives: Europe

August 2022



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# About This Report

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## Scope

This report forecasts to 2026 cement and concrete additive demand in nominal US dollars at the manufacturer level in Europe. Total demand is segmented by product in terms of:

- chemicals
- minerals
- fibers

Total demand is also segmented by market as follows:

- building construction
- roads and bridges
- other markets such as airports, ports, and railways

To illustrate historical trends, total demand is provided in annual series from 2011 to 2021; the various segments are reported at five-year intervals for 2011, 2016, and 2021.

Products excluded from this report include minerals used as substitute cementitious materials in clinker and blended cement production.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2021.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

Table 5 | Countries in Western Europe

Andorra	Germany*	Italy*	Portugal
Austria	Gibraltar	Jersey	Saint Pierre and Miquelon
Belgium*	Greece	Liechtenstein	San Marino
Channel Islands	Greenland	Luxembourg	Spain*
Denmark	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands*	United Kingdom*
France*	Isle of Man	Norway	Vatican City

\*Major cement and concrete additive markets.

Source: The Freedonia Group

Table 6 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland*	

\*Major cement and concrete additive markets.

Source: The Freedonia Group

## Sources

*Cement & Concrete Additives: Europe* (FE60050) is based on *Global Cement & Concrete Additives*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

**Table 7 | HS Codes Related to Cement & Concrete Additives**

HS Code	Definition
2520.10	Gypsum; anhydrite
2618.00	Granulated slag (slag sand) from the manufacture of iron or steel
2620	Slag, ash and residues (other than from the manufacture of iron or steel), containing arsenic, metals or their compounds, other.
3204.17	Pigments and preparations based thereon
3906.90	Acrylic polymers in primary forms, other
7004.90	Other glass

Source: United Nations Statistics Division

**Table 8 | NACE Codes Related to Cement & Concrete Additives**

NACE Code	Definition
08.11	Quarrying of ornamental and building stone, limestone, gypsum, chalk and slate
08.12	Operation of gravel and sand pits; mining of clays and kaolin
20.12	Manufacture of dyes and pigments
20.13	Manufacture of other inorganic basic chemicals
20.16	Manufacture of plastics in primary forms
24.10	Manufacture of basic iron and steel and of ferro-alloys

Source: European Commission

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Global Cement & Concrete Additives*

### Freedonia Industry Studies

*Bricks, Blocks, & Pavers*

*Countertops*

*Flooring*

*Global Countertops*

*Global Decorative Tile*

*Global Flooring*

*Global Hard Surface Flooring*

*Global Housing*

*Global Prefabricated Housing*

*Global Siding (Cladding)*

*Hard Surface Flooring*

*Pipe Products & Markets*

*Precast Concrete Products*

### Freedonia Focus Reports

*Cement: Europe*

*Commercial Building Construction: United States*

*Construction Chemicals: United States*

*Construction Machinery: Europe*

*Construction: United States*

*COVID-19 Market Impact Analysis*

*Global Demographics*

*Global Macroeconomy*

*Gypsum: United States*

*Housing: Europe*

*Insulation: Europe*

*Manufacturing: United States*

*Mining & Quarrying: United States*

*Paint & Coatings: Europe*

*Precast Architectural Building Components: United States*

*Precast Structural Building Components: United States*

### Freedonia Custom Research



## Trade Publications

*Global Cement Magazine*

*Global Gypsum Magazine*

*International Construction*

## Agencies & Associations

British Geological Survey

CAA (Cement Admixtures Association)

Cembureau

ECOBA (European Coal Combustion Products Association)

EFCA (European Federation of Concrete Admixtures Associations)

ERMCO (European Ready Mixed Concrete Organization)

Euroslag

Eurostat

International Monetary Fund

Organisation for Economic Co-operation and Development

Portland Cement Association

United Nations Comtrade

World Bank