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Global Cement & Concrete Additives

July 2019



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About This Report

Scope

This report forecasts to 2023 global demand for cement and concrete additives by product, market, and major world region in nominal US dollars at the manufacturer level. Product segments include:

- chemicals (water reducers, set controllers, colorants, air entrainers, and other chemical additives)
- minerals (gypsum, fly ash, blast furnace slag, silica fume, and other mineral additives)
- fibers (steel fibers, synthetic fibers, and fibers made from other materials)

Reported markets encompass:

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

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, product, market, and regional demand (including product and market segments) are provided for 2008, 2013, and 2018.

Products excluded from the 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 at that prevailing in 2018.

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.

Sources

Global Cement & Concrete Additives (FW60050) is based on 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

About This Report

- 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 9 | NAICS & SIC Codes Related to Cement & Concrete Additives

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
212393	Other chemical and fertilizer mineral mining	1499	Miscellaneous nonmetallic minerals, except fuels
325211	Plastics material and resin manufacturing	2816	Inorganic pigments
325130	Synthetic dye and pigment manufacturing	2819	Industrial inorganic chemicals, not elsewhere classified
325180	Other basic inorganic chemical manufacturing	2821	Plastic materials and resins
327212	Other pressed and blown glass and glassware manufacturing	2899	Chemicals and chemical preparations, not elsewhere classified
327420	Gypsum product manufacturing	3089	Plastic products, not elsewhere classified
327992	Ground or treated mineral and earth manufacturing	3229	Pressed and blown glass and glassware, not elsewhere classified
331110	Iron and steel mills and ferroalloy manufacturing	3275	Gypsum products
		3295	Minerals and earths, ground or otherwise treated
		3399	Primary metal products, not elsewhere classified

Source: US Census Bureau

Table 10 | 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

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

Construction Chemicals in the US

Pipe: Products & Markets

Precast Concrete Products in the US

Global Construction Aggregates

Global Housing

Freedonia Focus Reports

Construction Aggregates: United States

Construction Chemicals: United States

Precast Architectural Building Components: United States

Precast Concrete Products: United States

Precast Structural Building Components: United States

Precast Transport Infrastructure Products: United States

Precast Water & Waste Handling Products: United States

World Construction Aggregates

Freedonia Custom Research

Trade Publications

Building Design + Construction

Concrete Construction

The Concrete Producer

Concrete Products

Engineering News-Record

Global Cement

Global Gypsum

IHS Chemical Week

World Cement

Agencies & Associations

American Concrete Institute

Cement Association of Canada

The European Cement Association (Cembureau)

Eurostat

Portland Cement Association

World Bank