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World Construction Aggregates

Industry Study with Forecasts for **2011 & 2016**

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Industry Study with Forecasts for *2011 & 2016*

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Some of the strongest sales increases in construction aggregates will be registered in India, which is already one of the largest national markets, as well as in the huge Chinese market.

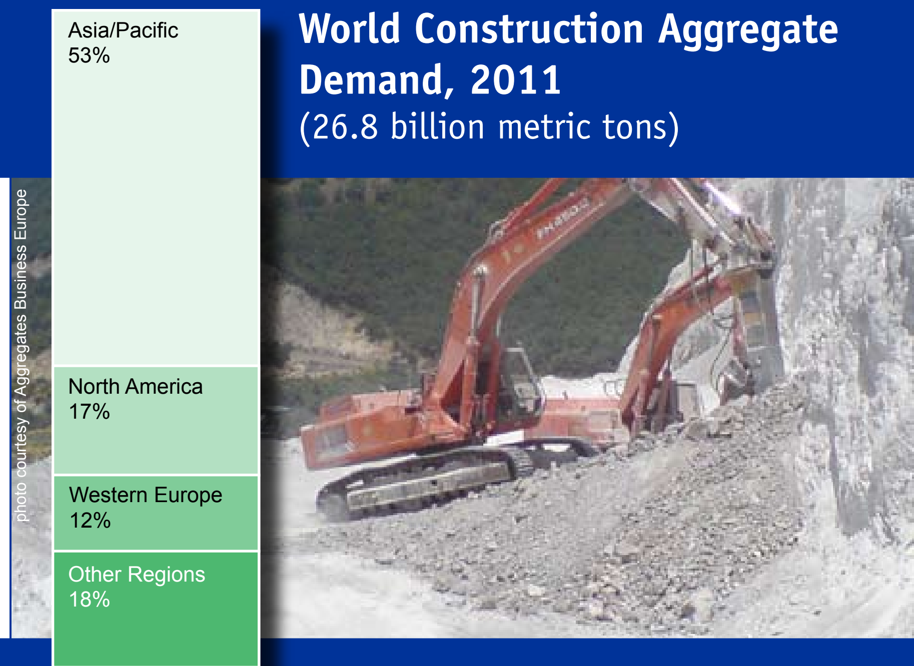
World demand to rise 4.7% annually through 2011

Global demand for construction aggregates is expected to grow 4.7 percent annually through 2011 to 26.8 billion metric tons, valued at $201 billion. Some of the strongest sales increases will be registered in India, which is already one of the largest national markets, as well as in the huge Chinese market. Smaller markets such as Indonesia, Thailand, a number of developing countries in Asia, and Iran will also record strong gains, spurred by industrialization activity and continued growth in infrastructure construction. Infrastructure repair and maintenance construction will drive aggregates demand in developed areas, including the US, Japan and Western Europe. An increase in nonbuilding construction in the US will also support aggregates market growth, despite a slowdown in residential building activity.

Recycled, specialty aggregates to lead gains

Growing environmental and land use concerns will spur above-average sales gains for aggregates composed of recycled materials like crushed hydraulic and asphaltic concrete and waste materials such as fly ash and blast-furnace slag. Market advances will also be bolstered by growing sales of specialty aggregate products like expanded clay and shale, which are used in applications such as bridge decks, where light weight is crucial.

World Construction Aggregate Demand, 2011
(26.8 billion metric tons)



Nonbuilding construction to remain dominant use

The nonbuilding construction market, which accounted for over 70 percent of worldwide aggregates demand in 2006, is forecast to be the fastest growing. Gains in nonbuilding construction will predominantly be fueled by an increase in road and highway development in developing nations.

Asphalt applications to offer best opportunities

Demand for construction aggregates used in the production of asphaltic concrete will climb the fastest of all major application categories, spurred by growth in road building and maintenance construction around the world. Aggregates used in hydraulic concrete applications, which accounted for approximately 40 percent of total 2006 product demand, are expected to rise at a slightly more moderate pace. Foreign trade accounts for a very small portion of global aggregates supply and demand but is expected to increase moderately through 2011, spurred by continuing improvements in mining, processing and material handling efficiencies, more stringent environmental and land use regulations, further expansion of offshore sources of supply and the development of spot shortages in construction markets with high growth rates.

Sample Text, Table & Chart

TABLE VI-4

CHINA - CONSTRUCTION AGGREGATES DEMAND
(million metric tons)

Item	1996	2001	2006	2011	2016
Construction Expenditures (bil 2005$)	4				.0
m tons aggregates/000$ construction					8
Construction Aggregates Demand					0
By Type:					
Sand					5
Crushed Stone					5
Gravel					5
Other					5
By Market:					
Nonbuilding Construction					0
Nonresidential Building					0
Residential Building					650

SAMPLE TABLE

ASIA/PACIFIC

China: Construction Aggregates Demand

The construction aggregates market in China in 2006 wa lion metric tons, over one-fourth of global consumption. Thr past decade, increases in Chinese aggregates demand have ri than all other major markets, climbing at a 9.7 percent annua 1996 to 2006. Advances have been spurred by the country's industrialization efforts, resulting in significant increases in b nonbuilding construction for buildings, and supporting infras The largest share of aggregates demand is accounted for by c sand, followed by gravel, crushed stone and other material ty

The Chinese construction aggregates industry is mostly of small or medium-sized, locally based producers, even thou have been increases in foreign investment. Among domestic suppliers are companies such as Beijing Hengkun Toufeng Quarry, Huzhou Xinkaiyuan Crushed Stone, and Hangzhou Jin Gang Building Material. Foreign multinationals in China that operate aggregate mining and processing facilities include CSR and HeidelbergCement.

Demand for construction aggregates in China is projected to rise at a … billion metric tons. Although … m the 2001-2006 growth rate … verage, driven by further incr… structure construction activity. … highway network -- known as the "7918 Network" -- which will extend the total length of highways in China to 85,000 kilometers (scheduled to be completed in 2035). Competition for foreign investment funding will increase as economic conditions improve for other developing Asian countries, limiting Chinese aggregates demand from rising at an even greater rate.

SAMPLE TEXT

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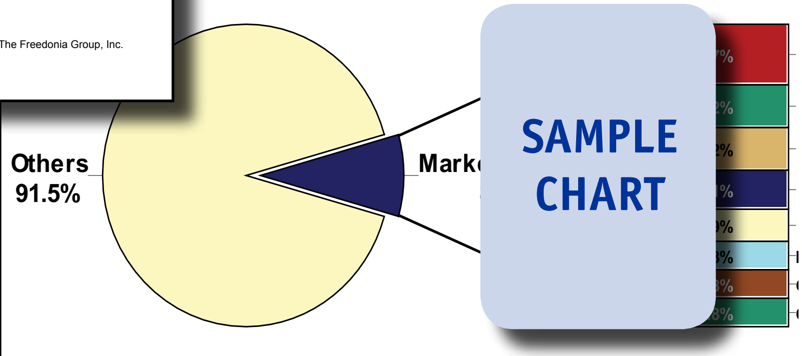
CHART VIII-1

WORLD CONSTRUCTION AGGREGATES MARKET SHARE BY COMPANY, 2006
(21.4 billion metric tons)



SAMPLE CHART

Sample Profile, Table & Analysis

TABLE VI-3

CHINA - ECONOMIC INDICATORS

Item	1996	2001	2006	2011	2016
Population (millions)	12				1392
per capita GDP	3				20
Gross Domestic Product (bil 2005$)	4				10
% construction					.6
Construction Expenditures (bil 2005$)	44				.0
Nonbuilding	12				.0
Nonresidential Building	19				.0
Residential Building	12				.0
m tons aggregates/capita					.9
m tons aggregates/mil $ GDP					11
m tons aggregates/000$ construction	5				48
Construct Agg Demand (mil m tons)	24				50

SAMPLE TABLE

COMPANY PROFILES

Granite Construction Incorporated
585 West Beach Street
Watsonville, CA 95076
831-724-
http://ww

Sales: $3
Employ
Key Pro ... and sandstone,
decompo ... base, fill materials
and rock

SAMPLE PROFILE

Gran ... construction contractor serving both the public and private sectors. The Company operates through three segments: Branch, Heavy Construction and Other. In February 2007, Granite Construction announced plans to realign its operations into two new divisions, Granite West and Granite East, by February 2008.

Granite Construction was tied in 2006 with Martin Marietta Materials and CEMEX as the sixth largest producer of construction aggregates, with a 0.8 percent share of the global market, and is active in the world construction aggregates industry through both segments. The Branch segment, which had 2006 sales of $1.8 billion, is involved in such small- to medium-sized construction projects as the building and maintenance of roads, streets, highways and bridges. The Company's Heavy Construction segment, which recorded sales of $1.1 billion in 2006, is involved in large-sized construction projects throughout the US, including dams, tunnels, mass transit systems, highways, airport runways, pipelines and canals. Both segments also include excavation, site clearing and other maintenance operations. Furthermore, Granite Construction mines construction aggregates and operates plants that

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"As one might expect, the largest consumer of aggregates in the Asia/Pacific region is China, making up 56 percent of all regional aggregates demand in 2006. China's aggressive industrialization efforts have caused aggregates demand in the country to grow at a faster rate than any other major aggregates market in the world over the past decade, climbing 9.7 percent annually from 1996 to 2006."

--Section VI, pg. 107

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Other Studies

World Asphalt

Global demand for asphalt will reach 123 million metric tons in 2011. Most developed areas will register relatively slow gains while developing countries post much more robust advances. Gains in China and India, however, are decelerating. Paving products will remain dominant and outpace roofing and other asphalt products. This study analyzes the 661 million barrel world asphalt industry, with forecasts for 2011 and 2016 by product, world region and 20 countries. It also details market share and profiles major firms.

#2274 .... 01/2008..................... $5500

Asphalt

US demand for asphalt will reach 38 million tons in 2011. Paving products will remain the dominant segment and benefit from increased government spending on highway and road construction. Roofing products will grow slightly faster, driven by good prospects for low-slope roofing products in nonresidential markets. This study analyzes the $15 billion US asphalt industry, with forecasts for 2011 and 2016 by product, market and region. It also evaluates company market share and profiles major players.

#2242 .... 11/2007..................... $4500

Gypsum Products in North America

Demand for gypsum products in the US, Canada and Mexico will reach 54.6 metric tons in 2011. Nonresidential buildings will offer the best opportunities and help offset weakness in the key residential construction market. Synthetic gypsum will continue to supplant mined gypsum for use in calcined gypsum products. This study analyzes the North American gypsum industry, with forecasts for 2011 and 2016 by product, market and country. It also evaluates company market share and profiles major producers.

#2225 .... 08/2007..................... $4500

Asphalt in China

Demand for asphalt in China will rise 6% annually through 2010, driven by strong gains in road and building construction. Paving applications will outpace roofing and remain dominant. Asphalt shingles and modified bitumen membranes will gain market share in roofing while asphalt built-up and roll types will lose ground. This study analyzes the ¥23.3 billion Chinese asphalt market for 2010 and 2015 by product, market and region. It also evaluates company market share and profiles leading competitors.

#2167 .... 03/2007..................... $4900

World Cement & Concrete Additives

Global demand for cement and concrete additives will grow 5.1% annually through 2010. Gains will be fueled by the increased acceptance of additives in high-volume developing markets for cement, and by higher additive loadings and costlier product (e.g., superplasticizers) use in mature markets. This study analyzes the $8.7 billion world cement and concrete additive industry for 2010 and 2015 by type, market, world region and for 24 countries. It also evaluates company market share and profiles major producers.

#2135 .... 12/2006..................... $5400

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