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World Cement & Concrete Additives

Industry Study with Forecasts for **2012 & 2017**

Study #2425 | December 2008 | \$5700 | 364 pages

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The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

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Gains in demand will be driven by increased penetration of chemical and fiber additives in concrete construction, in both emerging markets and more mature cement industries.

Global demand to rise 6% annually through 2012

World demand for cement and concrete additives will rise 6.0 percent per year to \$16.2 billion in 2012. Advances will be driven by increased penetration of chemical and fiber additives in concrete construction, in both emerging markets in Asia and Eastern Europe as well as the more mature cement industry in North America. Additionally, the use of mineral additives as cement supplements will be driven by environmental concerns, in addition to an increased supply of cementitious byproducts from growing coal consumption and iron production around the world.

Chemical, fiber additives to be fastest growing

Demand for chemical and fiber additives will grow at the fastest pace as acceptance of these products and the benefits they provide continues to rise. In particular, strong growth is expected for high-performance superplasticizing water reducers, which facilitate concrete pouring and enhance the strength of concrete structures. Sales of fiber additives will expand most rapidly in emerging construction markets, particularly in the Asia/Pacific region. Mineral additives will also see solid gains in demand, particularly in high-growth, high-volume cement markets such as China and India. The use of mineral additives allows cement producers to take advantage of low-cost fly ash and



blast furnace slag byproducts, reducing waste and limiting the CO2 emissions associated with cement production.

Asia/Pacific region offers best growth opportunities

Among the three major world regions, strongest advances are forecast for cement and concrete additives in the Asia/Pacific region, which is home to rapidly growing cement markets such as China and India. Gains in the region will also benefit from a rebound in construction activity in South Korea and Taiwan. Although the cement industry in North America is also quite mature, above-average gains in additive demand will be driven by an increased focus on produc-

tion of more durable concrete and utilization of mineral waste products. Demand for additives in Western Europe will post subpar gains through 2012. The use of both chemical and mineral additives is already widespread in the region, restricting prospects for growth. Additive demand in Eastern Europe, led by Russia, will outpace the global average, fueled by increased utilization of abundant slag and fly ash waste materials and incorporation of EU trends of additive use in concrete construction. Growth in Latin America and the Africa/Mideast region will be driven by increasing industrialization, infrastructure development and modernization of construction practices.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Cement & Concrete Additive Demand

Demand for cement and concrete additives in India total million in 2007, with sales having more than tripled in the ten years since 1997. Mineral additives dominate the market with 80% of total additive sales in 2007. India is the second largest coal producer in the world, making disposal of waste coal ash a significant environmental problem. In the last decade or so, the Indian government has implemented a wide range of regulations and incentives promoting the use of fly ash, especially in cement and concrete. For example, state electric utilities are required to give away the fly ash produced at power plants free of cost to any company which will put it to use. As a result, the use of fly ash in cement and concrete increased rapidly over the decade from 1997 to 2007, although the additive's market has declined due to the heavy intervention by Indian government.

Blast furnace slag is also widely used as a cement supplement in India, one of the world's top ten iron producers. Demand for slag in blended cement rose at a strong pace during much of the 1990s. In recent years, however, the market for slag has suffered from competition with fly ash, which costs significantly less in India. The use of chemical additives in India is much less widespread than mineral additives, with rates of addition per metric ton of cement trailing a number of other countries in the region, such as Japan, South Korea and Taiwan. However, chemical additive demand per ton of cement in India has made considerable gains over the period from 1997 to 2007.

Demand for cement and concrete additives in India is forecast to rise to 1.5 million metric tons by 2017, the fastest of any country in the region. This growth is fueled by strong growth in construction, particularly in the infrastructure environment that will be needed to support the projected increases in coal production and consumption. Freedonia Group, Inc. will provide a healthy supply of

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SAMPLE TEXT

TABLE VI-7

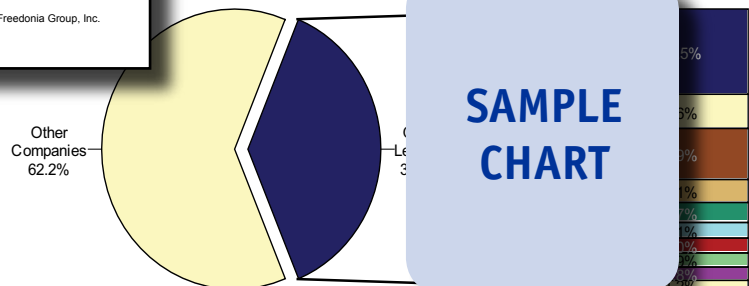
INDIA -- KEY INDICATORS FOR CEMENT & CONCRETE ADDITIVE DEMAND

Item	1997	2002	2007	2012	2017
Population (millions)	953	1043	1126	1205	1285
\$ GDP/capita	1570	1860	2600	3510	4540
Gross Domestic Product (bil 2006\$)	1,400	2,040	2,600	4,000	5,240
% construction	0.8	0.9	1.0	1.1	1.2
Construction Expenditures (bil 2006\$):					
Nonbuilding	0.9	1.1	1.3	1.5	1.7
Nonresidential Buildings	0.4	0.5	0.6	0.7	0.8
Residential Buildings	0.5	0.6	0.7	0.8	0.9
kg cement/capita	5	6	7	8	9
kg cement/000\$ GDP	2	2	2	2	2
kg cement/000\$ construction	4	4	4	4	4
Cement Demand (million metric tons)	0	0	0	0	0

SAMPLE TABLE

CHART VIII-2

CEMENT & CONCRETE ADDITIVES MARKET SHARE, 2007 (\$12.1 billion)

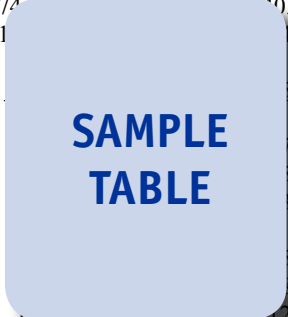


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-8
INDIA -- CEMENT & CONCRETE ADDITIVE DEMAND BY TYPE & MARKET (million dollars)

Item	1997	2002	2007	2012	2017
Cement Demand (million metric tons)	74	100	120	140	160
\$ additives/metric ton cement	1	1	1	1	1
Cement & Concrete Additive Demand					
By Type:					
Minerals					
Chemicals					
Fibers					
By Market:					
Buildings					
Highways & Streets					
Other					



COMPANY PROFILES

AfriSam South Africa Pty Limited
 Constantia Park
 AfriSam House
 Center 14th Avenue and Hendrik Potgieter Road
 Weltevredenpark, Roodepoort 1700
 South Africa
 27-11-670-550
 http://www.afr

SAMPLE PROFILE

Annual Sales: (0/08)
 Employment:
 Key Products: silica fume

AfriSam South Africa is a leading producer of silica fume, cement, aggregates, ready-mix concrete and other construction materials in South Africa. The privately held company is 15-percent owned by Holcim Limited (Switzerland). Prior to June 2007, AfriSam South Africa was 54-percent owned by Holcim and operated as Holcim South Africa Pty Limited. In June 2007, AfriSam Consortium Pty Limited (South Africa) acquired a 39-percent stake in Holcim South Africa from Holcim Limited. Following the sale, the Company's name was changed to AfriSam South Africa.

The Company is active in the the cement and concrete additives market mainly through the production of SLAGMENT ground granulated blast furnace slag (GGBS) and CSF-90 silica fume. SLAGMENT GGBS, a latent hydraulic binder, is used mainly as a partial cement replacement material in the production of concrete and certain other construction applications. SLAGMENT GGBS-modified concrete is typically used in the construction of buildings, dams, bridges, roads and

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“Sales of chemical and fiber additives, however, are expected to nearly double through 2012, bolstered by government-sponsored infrastructural improvement projects in the nonresidential building and nonbuilding sectors. For example, in 1998 the Indian government launched the ambitious National Highway Development Project, which has the goal of building or expanding more than 45,000 kilometers of four- or six-lane roads connecting India’s largest metropolitan areas by 2015. Chemical additives are used extensively in concrete for this project in order to facilitate construction and improve strength and durability. Additionally, ...”
 --Section VI, pg. 167

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OTHER STUDIES

Cement in China

China is the largest cement market in the world. This study presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by cement product (portland, blended), end use (residential, nonresidential, nonbuilding), market (construction contractors, concrete products, ready-mix concrete, consumer) and region (e.g., Central-North, Central-East, Southwest). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2408 01/2009..... \$5100

Cement & Concrete Additives

US cement and concrete additive demand will grow 6.4% annually through 2012, as construction activity rebounds from a low 2007 base. Chemical additives will stay the top segment, led by water reducers such as superplasticizers. Mineral additives will grow faster, paced by waste materials such as fly ash and blast furnace slag. This study analyzes the \$2.3 billion US cement and concrete additive industry, with forecasts for 2012 and 2017 by product and market. It also evaluates market share and profiles industry competitors.

#2382 08/2008..... \$4600

Construction Outlook in China

Construction expenditures in China will grow 9.2% annually through 2012. Nonbuilding construction will be the fastest growing sector based on the expansion and upgrading of the country's physical infrastructure, and on utilities construction. Nonresidential building will remain the largest market. This study analyzes the ¥4.8 trillion construction sector in China, with forecasts for 2012 and 2017 by type, market and geographic region. It also evaluates company market share and profiles industry participants.

#2356 07/2008..... \$5100

World Cement

Global demand for cement will grow 5.3% annually through 2012, driven by strong increases in construction activity in developing countries. The rate of growth in China, the largest market, will moderate considerably but remain above the world average. The second largest market, India, will grow the fastest. This study analyzes the 2.8 billion metric ton world cement industry, with forecasts for 2012 and 2017 by type, market, world region and for 46 countries. It also evaluates company market share and profiles 44 major players.

#2325 04/2008..... \$5800

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

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