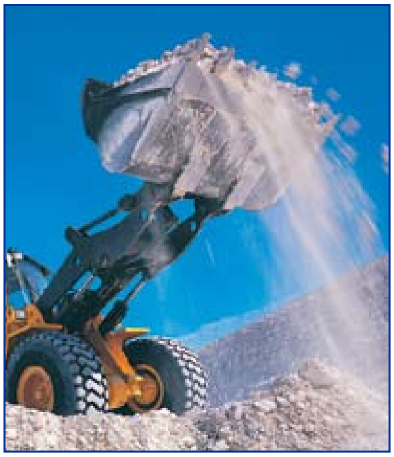

World Construction Aggregates

Industry Study with Forecasts for **2013 & 2018**

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The Asia/Pacific region will see the fastest growth, as construction spending in the area increases rapidly. Asian countries expected to post large gains include China, India and Indonesia.

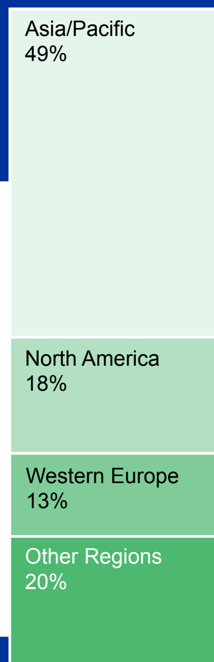
Global demand to expand 2.9% yearly through 2013

World demand for construction aggregates is forecast to expand 2.9 percent annually through 2013 to 28.7 billion metric tons. This represents a significant moderation from the pace of the 2003-2008 period, reflecting a slowdown in worldwide economic and construction expenditure growth. Nonetheless, advances in the construction aggregates market through 2013 will still be healthy. The Asia/Pacific region will experience the fastest growth, as nonbuilding, residential building and nonresidential building construction spending in the area increases rapidly. A number of countries in the area are expected to post large gains, including China, India and Indonesia. More than 80 percent of all global growth generated between 2008 and 2013 will occur in the region; China alone will account for almost three-fifths of all new aggregates demand.

The Africa/Mideast region and Eastern Europe are also projected to see solid growth in construction aggregates demand, spurred by industrialization activity and infrastructure construction. Turkey and Poland are expected to outperform their regional counterparts through 2013. Product demand in Latin America, on the other hand, is forecast to remain relatively flat from 2008 and 2013 because of stagnant nonbuilding and nonresidential building construction expenditures.

World Construction Aggregates Demand, 2008

(24.9 billion metric tons)



Growth in the developed parts of the world -- the US, Canada, Japan, Western Europe and Australia -- will not be as strong as in most industrializing areas. A slowdown in economic activity will cause construction spending in many of these nations to grow at a much slower pace than during the 2003-2008 period (the US is an exception), limiting demand for construction aggregates. Nonetheless, several countries will still experience a substantial increase in product sales through 2013, including Taiwan, South Korea, the Netherlands and the US, because of gains in residential construction spending.

Recycled/secondary aggregates to see fastest gains

Annual growth in the crushed stone, sand and gravel product segments during the 2008-2013 period will range from 2.4 to 3.1 percent. More stringent environmental and land use regulations will spur demand for recycled and secondary construction aggregates such as blast-furnace slag and crushed hydraulic concrete. The depletion of natural aggregates reserves in a number of nations will also contribute to this trend. As a result, sales of these other aggregate types are expected to grow 3.9 percent per year through 2013.

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Sample Text, Table & Chart

TABLE VI-6

INDIA - CONSTRUCTION AGGREGATES DEMAND
(million metric tons)

Item	1998	2003	2008	2013	2018
Construction Expenditures (bil 2007$)					
m tons aggregates/000$ construction					
Construction Aggregates Demand					
By Type:					
Crushed Stone					
Sand					
Gravel					
Other					
By Market:					
Nonbuilding Construction					
Nonresidential Building					
Residential Building					

SAMPLE TABLE

ASIA/PACIFIC

India: Construction Aggregates Demand

Construction aggregates demand in India was 1.4 billion in 2008, making it the Asia/Pacific region's second biggest m the world's third biggest behind China and the US. Strong e growth and large inflows of foreign investment stimulated m in industrialization and infrastructure-related construction. R construction expenditures, spurred by rising living standards, intensely. As a result, sales of construction aggregates in Ind percent per annum during the 2003-2008 period. However, t still has levels of product use -- gauged against GDP, populat construction expenditures -- that are far below regional norm

Crushed stone aggregates are the most popular product type in India, accounting for 40 percent of 2008 sales. There are also substantial levels of demand for gravel and sand aggregates, which account for equally large shares of the market. The utilization of aggregates from other materials has grown considerably in recent years, and is expected to continue to grow. Small and mid-sized companies, such as Aiswarya Granites, Blue Aggregates and SRK Infrastructures, are responsible for the majority of aggregates production in India. Participation by major foreign multinationals in the country's aggregates industry is limited, but it is expected to increase in the future.

The Indian market for construction aggregates is forecast to expand billion metric tons in 2008, slowing from the ceeding expected regionwide gains. Sales will be spurred by significant advances in idential building and nonbuilding construc- xample, the Indian government pledged to n the country ten-fold (from 2 kilometers per y) by 2012. India, possessing only limited financial resources, immediately began to look abroad for potential

SAMPLE TEXT

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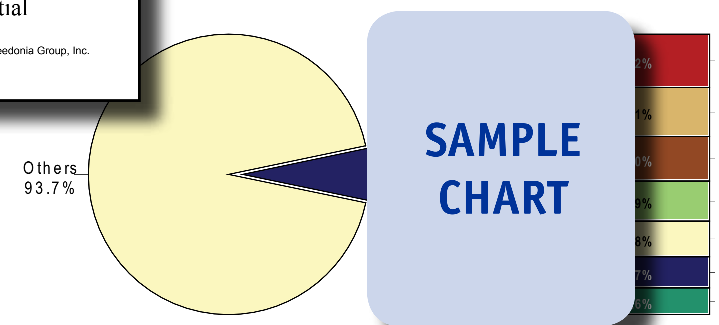
CHART VIII-1

CONSTRUCTION AGGREGATES MARKET SHARE BY COMPANY, 2008
(24.9 billion metric tons)



SAMPLE CHART

World Construction Aggregates

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Sample Profile, Table & Forecast

TABLE VI-5

INDIA - CONSTRUCTION AGGREGATES MARKET ENVIRONMENT

Item	1998	2003	2008	2013	2018
Population (millions)					
per capita GDP					
Gross Domestic Product (bil 2007$)					
% construction					
Construction Expenditures (bil 2007$)					
Nonbuilding					
Nonresidential Building					
Residential Building					
m tons aggregates/capita					
m tons aggregates/mil $ GDP					
m tons aggregates/000$ construction					
Aggregates Demand (mil metric tons)					
% India					
AP Aggregates Demand (mil m tons)					

SAMPLE TABLE

COMPANY PROFILES

Nordkalk Corporation
Skrabbolevagen 18
Pargas 21600
Finland
358-20-753-7000
http://w

Sales: $
Geogra ... and 56
20%, P ... er Eur
Countri ... er Reg
Employ

Key Pro ... icklime & slaked lime

SAMPLE PROFILE

Nordkalk is a leading producer of limestone-based construction products in northern Europe. The Company has operations at more than 30 locations in eight countries, including mines and quarries in five countries. Nordkalk extracts limestone and processes it into crushed and ground limestone, enriched calcite, and quick and slaked lime. The Company also makes mineral products, including wollastonite. Markets served include the building materials, steel, pulp and paper, agriculture, environmental care and other sectors.

The Company is active in the world construction aggregates industry principally through the production and sale of NORDKALK limestone used as a building material. In 2008, the building materials market represented 27 percent, or approximately $135 million, of Nordkalk's total sales. Nordkalk manufactures limestone in crushed and powdered forms. The Company's crushed limestone can be used use as a raw material in the production of cement and hydraulic concrete. Applications for Nordkalk's powdered limestone include the production of

294

"China and India are the Asia/Pacific region's two biggest markets for construction aggregates, making up almost 70 percent of regional demand in 2008. Massive increases in infrastructure and industrialization-related construction activity in China and India caused sales of construction aggregates in each country to grow about twelve percent annually between 2003 and 2008."

--Section VI, pg. 118

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Other Studies

World Cement

This study analyzes the world cement industry. It presents historical demand data for 1998, 2003 and 2008, and forecasts for 2013 and 2018 by type (e.g., portland, blended), market (e.g., ready-mix concrete, construction contractors, consumer, concrete products), world region (e.g., Asia/Pacific, Western Europe, North America) and for major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2591 .... 01/2010.................... $6100

Construction Outlook in China

Construction spending in China is forecast to grow 8.1% yearly through 2013. Nonbuilding construction will rise at the fastest pace based on government efforts to modernize the transportation and utility infrastructure. Nonresidential building will remain the largest segment based on ongoing industrialization and institutional modernization. This study analyzes the 5.6 trillion yuan construction industry in China, with forecasts for 2013 and 2018 by type and region. It also evaluates market share and profiles industry participants.

#2507 .... 05/2009.................... $5200

Asphalt in China

Demand for asphalt in China is expected to rise 5% annually through 2012. Asphalt consumed in the manufacture of paving products will outpace roofing uses, driven by extensive infrastructure projects in paved surface construction. The ongoing Flat to Slope roof conversion project will benefit asphalt shingles. This study analyzes the 13.2 million metric ton asphalt industry in China, with forecasts for 2012 and 2017 by product, market and region. It also evaluates market share and profiles industry participants.

#2465 .... 04/2009.................... $5200

Cement in China

Demand for cement in China will rise 6% annually through 2012, driven by rising construction spending. Nonresidential building construction will stay the largest end use, while nonbuilding construction grows the fastest. Contractors will remain the largest market while ready-mix concrete grows most rapidly. This study analyzes the 317 billion yuan Chinese cement industry, with forecasts for 2012 and 2017 by product, end use, market and region. It also evaluates market share and profiles industry participants.

#2430 .... 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

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