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World Cement

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

Study #2591 | January 2010 | \$6100 | 453 pages

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Toll Free US Tel: 800.927.5900 or +1 440.684.9600

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E-mail: info@freedoniagroup.com

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Gains in cement demand will be fueled by rising investments in infrastructure among the developing countries of the world, and an improvement in the market for cement in developed areas.

Global demand to rise 4.1% yearly through 2013

Global demand for hydraulic cement is forecast to rise 4.1 percent per year to 3.5 billion metric tons in 2013, valued at \$246 billion. Gains will be fueled by rising investments in infrastructure among the developing countries of the world, driven by economic growth and increasing per capita income levels. Additionally, an improvement in the market for cement in developed areas, particularly the United States but also Western Europe and Japan, will also benefit world cement demand.

Growth to lag pace of 2003-2008 period

However, gains in demand through 2013 will lag the robust advances seen from 2003 to 2008. Many of the fastest-growing markets for cement during this period, including China, Russia, Brazil and other large consumers, will experience a substantial deceleration in cement demand going forward. The global economic recession which began in 2008 led to a notable slowdown in construction activity, and increases in construction spending and cement sales will rise at a more moderate pace through 2013.

Developing Asia/Pacific countries to lead gains

Nonetheless, a number of countries will continue to see strong gains in demand

Asia/Pacific
69%

Africa/Mideast
12%

Western Europe 6%

North America 5%

Other Regions 8%

World Cement Demand by Region (3.5 billion metric tons, 2013)



for cement, particularly in the Asia/Pacific region. China, which accounts for nearly half of world cement demand, will see a slowing rate of growth through 2013 as construction spending decelerates, but gains will remain above the global average. India, the world's second largest cement market, will see some of the most rapid advances of any country in the world. Other fast-growing markets for cement in the region will include the Philippines, Taiwan and Vietnam, all with growth rates exceeding six percent per year. In the developing nations of Latin America, Eastern Europe and the Africa/Mideast region, however, advances in cement demand will slow considerably from the robust gains seen during the 2003-2008 period.

Increases in cement demand in the developed areas of the US, Western Europe and Japan will lag the average global pace of growth, although improving substantially from their 2003-2008 performance. In the US, cement demand plummeted in the wake of a residential building slump and economic recession from 2006 to 2008, but a solid rebound is expected through 2013. In Western Europe, improvement in construction activity will fuel a turnaround in the region's three largest cement markets, Spain, Italy and Germany. Similarly, a modest rise in construction spending in Japan will drive increases in cement consumption after a long period of decline.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Cement Supply & Demand

Demand for cement in India totaled 176 million metric tons in 2008, representing the second largest market in the world behind China. Sales gains in India have exceeded both regional and global averages over the past decade, rising steadily at an average of nearly 10% per year from 1998 to 2008. Cement demand in the country has been stimulated by healthy increases in both industrialization-related and infrastructure-related construction activity, attributable in large part to economic reforms that have attracted significant foreign investment. The widespread use of concrete-based construction technology also helped bolster overall Indian cement demand. The construction sector accounted for more than half of all product sales in 2008, although other outlets grew at a faster pace over the preceding decade. The ready-mix concrete and concrete products markets are the next largest segments of the Indian cement market.

India is also the second largest producer of cement in the world, behind China, with 2008 industry output of 177.1 million metric tons. Like China, India is a net exporter of cement, although exports were small relative to industry production in 2008. India's net exports rose over the period from 1998 to 2006, driven primarily by strong demand for cement in coastal Middle Eastern countries such as Kuwait, Yemen and the UAE. However, strong domestic demand, rising capacity in foreign markets and trade restrictions on cement exports caused India's trade balance to shift from a surplus in 2007 and 2008. In fact, 2008 saw India importing 1.5 million metric tons of cement in order to fill the gap between domestic supply and demand.

India's cement demand is projected to rise at a steady pace to 215 million metric tons, the fastest growing market in the world. Product demand will continue to be driven by strong economic growth and infrastructure development.

141

**SAMPLE
TEXT**

TABLE VI-5

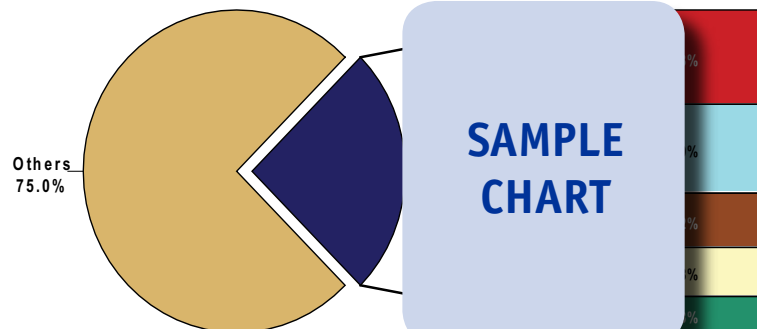
INDIA -- KEY INDICATORS FOR CEMENT DEMAND

Item	1998	2003	2008	2013	2018
Population (million persons)	100	105	110	115	120
per capita GDP	100	120	140	160	180
Gross Domestic Product (bil 2007\$)	100	150	200	250	300
% construction	8	9	10	11	12
Construction Expenditures (bil 2007\$):					
Nonbuilding	10	15	20	25	30
Nonresidential Building	5	8	12	15	18
Residential Building	5	7	8	10	12
kg cement/capita	6	7	8	9	10
kg cement/000\$ GDP	0	0	0	0	0
kg cement/000\$ construction	7	8	9	10	11
Cement Demand (mil metric ton)	100	120	140	160	180
% India	4	5	6	7	8
Asia/Pacific Cement (mil metric ton)	100	120	140	160	180

**SAMPLE
TABLE**

CHART VIII-1

WORLD CEMENT MARKET SHARE BY COMPANY, 2008 (\$218.5 billion)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

COMPANY PROFILES

Pretoria Portland Cement Company Limited

PPC Building, Barlow Park
 180 Katherine Street
 Sandton 2146
 South Africa
 27-11-386-0000
<http://www.ppc.co.za>

Revenues:
 Employment:

Key Products: portland cement, fly ash cement, cement-based building materials, aggregates

Pretoria Portland Cement (PPC) is a leading supplier of cement and construction materials in South Africa. PPC operates in three segments: Cement, Lime and Aggregates.

The Company is active in the world cement industry through the Cement segment, which operates as PPC Cement (South Africa), a wholly owned subsidiary. PPC Cement accounted for 88 percent, or approximately \$660 million, of the Company's total sales. Types of cement made by the firm include SUREBUILD and OPC general-purpose Type I portland, UNICEM general-purpose Type II portland, RAPO rapid-hardening portland and BOTCEM fly ash. PPC Cement is also engaged in the production of cementitious mortars and other cement-based building materials. The company markets cement via terminals and licensed independent distributors.

PPC Cement has cement plants in South Africa, Botswana and Zimbabwe. These facilities have the combined capacity to produce

418

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**SAMPLE
PROFILE**

TABLE VI-6

INDIA -- CEMENT SUPPLY & DEMAND (million metric tons)

Item	1998	2003	2008	2013	2018
Construction Expenditures (bil 2007\$) 2007					20.0
kg cement/000\$ construction					17.0
Cement Demand					10.0
By Type:					
Blended					10.0
Portland					5.0
Other					5.0
By Market:					
Ready-Mix Concrete					5.0
Construction Contractors					5.0
Consumer					10.0
Concrete Products					10.0
Other					10.0
net exports					10.0
Cement Production					20.0

**SAMPLE
TABLE**

"Cement production by plants in India is expected to increase 7.5 percent per year to 254.5 million metric tons in 2013, matching growth in local demand. Industry output will be driven by a rapid expansion in the nation's production capabilities to serve its growing cement market. Virtually all of the leading cement producers in India are planning to increase production capacity in the coming years. For example, ..."

--Section VI, pg. 143

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OTHER STUDIES

Precast Concrete Products

This study analyzes the US precast concrete products industry, excluding concrete pipe, brick and block. The study presents historical demand data (2000, 2005, 2010) and forecasts for 2015 and 2020 by precast concrete type (e.g., structural building components, architectural building components, transportation and marine, cemetery products, waste and waste handling, agricultural) and US regional market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2746 March 2011..... \$4800

Cement & Concrete Additives

US cement and concrete additive demand will rise 9.9% yearly through 2014. The residential building market will grow the fastest, followed by highway and street uses based on continued federal transportation funding. Chemical additives will remain the largest segment, while mineral and fiber additives lead gains. This study analyzes the \$1.9 billion US cement and concrete additive industry, with forecasts for 2014 and 2019 by product and market. It also evaluates company market share and profiles industry players.

#2657 July 2010..... \$4800

World Asphalt

Global asphalt demand is forecast to rise 2.1% annually through 2013. China and India will remain among the fastest growing markets. The rest of the Asia/Pacific region will outpace the mature West European and North American markets. Asphalt roofing will grow faster than the dominant paving sector. This study analyzes the 97 million metric ton world asphalt industry, with forecasts for 2013 and 2018 by product, region and for 54 countries. It also evaluates company market share and profiles industry participants.

#2602 April 2010 \$5900

World Construction Aggregates

Global construction aggregates demand will rise 2.9% yearly through 2013. The Asia/Pacific market will lead gains and claim most new demand. More stringent environmental laws will favor recycled and secondary products such as blast furnace slag and crushed hydraulic concrete. This study analyzes the 24.9 billion metric ton world construction aggregates industry, with forecasts for 2013 and 2018 by type, market, application, world region and for 18 countries. It also evaluates company market share and profiles industry players.

#2564 December 2009 \$5600

Asphalt

US consumption of asphalt products will reach 30.8 million tons in 2013. Demand gains will derive primarily from the recovery of new residential construction from its weak 2008 levels, benefiting both roofing and paving products. The dominant paving product segment will benefit from increased government spending on highway and road construction. This study analyzes the US asphalt product industry, with forecasts for 2013 and 2018 by type, market and region. It also evaluates market share and profiles industry players.

#2544 October 2009 \$4800

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