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World Asphalt

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

Study #2602 | April 2010 | \$5900 | 429 pages

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North America will remain the largest market based on the size of the US and Canadian road networks and the dominant position of asphalt materials in the region's roofing market.

Global demand to expand 2.1% yearly through 2013

World demand for asphalt is forecast to expand 2.1 percent annually from a weak 2008 base to 108 million metric tons in 2013, equivalent to 655 million barrels of primary asphalt. The world's most developed asphalt markets (North America, Western Europe and Japan) will post moderate gains in demand. In China and India, growth in demand will remain well above the world average, although gains will decelerate. For the rest of the Asia/Pacific region, gains will be about average but will outpace the mature West European and North American markets. In Latin America and the Africa/Mideast region, decelerating growth in road building activity and construction spending will lead to reduced opportunities for asphalt.

Asphalt to remain dominant in paving segment

Paving products accounted for more than 80 percent of total asphalt demand in 2008. Generally, asphalt faces little competition in the paving segment, particularly in Western Europe and North America, since asphalt is widely favored over concrete in most road paving applications. In roofing markets, on the other hand, asphalt roofing faces stiff competition from a variety of materials, including concrete and clay tile, metal roofing, elastomeric membranes and fiber cement. While asphalt roofing holds a dominant position in key markets such

World Asphalt Demand, 2013 (108 million metric tons)



as the US and Canada, demand in many other markets is somewhat limited. Growth in demand will derive from increasing acceptance of modified bitumen membranes in low-slope roofing and, in a few markets, asphalt shingles in steep-slope roofing.

Asia/Pacific region to stay fastest growing market

In North America, the largest regional market for asphalt, demand will rebound from a weak 2008 base in both paving and roofing markets. The Asia/Pacific region will remain the fastest growing geographic market for asphalt, largely because of huge road and highway construction and modernization pro-

grams underway in China and India. In both countries, gains will decelerate from the levels posted in the 2003-2008 period, but will still be well above the global average. China will be especially important, accounting for 28 percent of all new global asphalt demand through 2013. Demand in the region will increase 3.3 percent annually through 2013.

Demand for asphalt in Western Europe is projected to increase less than one percent annually through 2013. Gains will derive from continued demand in road repair and maintenance applications, and from increasing market share for asphalt roofing, particularly for modified bitumen membranes used in low-slope roofing.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Asphalt Demand

Demand for asphalt in China is projected to increase annually to 15 million tons in 2013. Gains will derive primarily from increasing demand for asphalt in road and highway paving, reflecting China's ongoing commitment to large-scale expansion and modernization of its road infrastructure. Although asphalt holds a relatively small position in China, demand will expand, particularly in flat roof applications, reflecting growth in construction activity.

China's network of paved roads, which totaled nearly 4 million kilometers in 2008, will continue to expand, increasing annually through 2013. Because of its size, China has a huge network of roads and highways, essential for moving people and goods and to facilitate the nation's enormous export economy. Increasingly, older unpaved roads are being replaced with more modern paved surfaces, and many new extensions and highways are being built to improve transportation in China's interior. Finally, major cities such as Beijing and Shanghai are also recording growth in new road construction.

The Chinese government has laid out an ambitious road construction plan to build seven lines connecting Beijing and seven border cities across China, as well as nine lines running north to south and 18 east-west lines. The network, known as the "7918 Network," will extend the total length of paved roads in China to 85,000 kilometers by 2035.

The Chinese government's strategy, emphasizing further investment in the road network, will also contribute to the growth of the asphalt market.

Asphalt markets in China is projected to expand to 15 million metric tons in 2013, accounting for three-quarters of total demand in 2008, paving applications.

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SAMPLE TEXT

TABLE VI-3

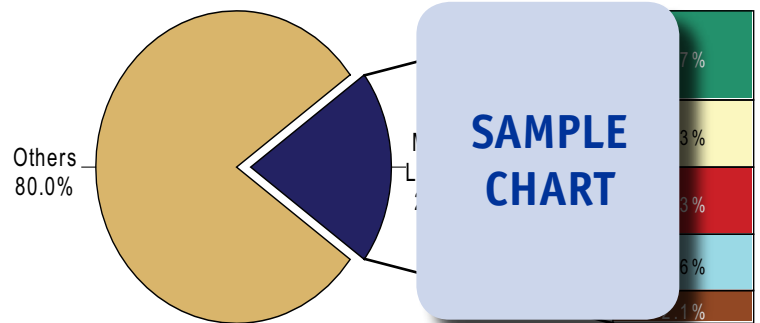
CHINA: ASPHALT SUPPLY & DEMAND

Item	1998	2003	2008	2013	2018
Population (mil persons)	1,212	1,328	1,392	1,457	1,522
GDP/capita	1,000	1,800	2,800	4,200	5,600
Gross Domestic Product (bil 2007\$)	1,212	2,394	3,898	6,133	8,327
kg asphalt/capita	0.000	0.000	0.000	0.000	0.000
kg asphalt/000\$ GDP	0.000	0.000	0.000	0.000	0.000
Primary Asphalt Demand (mil metric tons)	0.000	0.000	0.000	0.000	0.000
Primary Asphalt Demand (mil bbls)	0.000	0.000	0.000	0.000	0.000
+ net exports & stock increases	0.000	0.000	0.000	0.000	0.000
Primary Asphalt Production (mil bbls)	0.000	0.000	0.000	0.000	0.000

SAMPLE TABLE

CHART VIII-2

PAVING ASPHALT MARKET SHARE BY COMPANY, 2008
 (1.4 billion metric tons)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-4
CHINA: ASPHALT DEMAND BY PRODUCT
(million metric tons)

Item	1998	2003	2008	2013	2018
Construction Expenditures (bil 2007\$)	30	35	40	45	50
Paved Roads (000 kilometers)	10	15	20	25	30
kg asphalt/000\$ construction	1.6	1.5	1.4	1.3	1.2
m tons paving asphalt/km road	1.5	1.4	1.3	1.2	1.1
Asphalt Demand	1.5	1.4	1.3	1.2	1.1
Paving Products:	0.75	0.7	0.65	0.6	0.55
Asphalt Cement	0.95	0.9	0.85	0.8	0.75
Asphalt Emulsions/Other Paving	0.80	0.75	0.7	0.65	0.6
Roofing Products	0.59	0.55	0.5	0.45	0.4
Other Asphalt Products	0.16	0.15	0.14	0.13	0.12
% China	0.3	0.3	0.3	0.3	0.3
Asia/Pacific Asphalt Demand	1.0	1.0	1.0	1.0	1.0



COMPANY PROFILES

Kukdong Oil & Chemicals Company Limited
 334-36 Yusan-dong
 Yangsan-City
 Kyungnam 626
 South Korea
 82-55-3800000
 http://www.koc.com

SAMPLE PROFILE

Sales: \$100 million
 Employed: 1000

Key Products: SBS-modified bitumen membranes, asphalt primers, paving-g

bitumen membranes, asphalt primers, paving-g

Kukdong Oil & Chemicals is a leading South Korean producer of petroleum-based chemicals and related products. It operates through three segments: Waterproofing Membrane, Lubricant and LPG.

The Company competes in the world asphalt industry through the Waterproofing Membrane segment, which encompasses the manufacture and sale of styrene-butadiene-styrene (SBS)-modified bitumen membranes, asphalt primers and related products. Kukdong produces SBS-modified bitumen membranes through the RUBYDECK, RUBYSHEET, RUBYPOL-S and RUBYCAP product lines.

RUBYDECK membranes, which comprise two layers of SBS-modified bitumen that surround a nonwoven polyester base, are used in the construction of roads, bridges, parking lots and other paved areas, and can also be applied to roofs. The Company's RUBYSHEET waterproofing membranes consist of nonwoven polypropylene fabrics coated layers of SBS-modified bitumen. These membranes, which provide

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“Consumption of asphalt in roofing markets in China is projected to increase 2.2 percent annually to 3.2 million metric tons in 2013. Demand will benefit from growth in construction spending, especially for flat roof materials such as roll roofing, modified bitumen roofing and other built-up roofing materials. These products dominate asphalt roofing demand in China, with asphalt shingles accounting for only about ten percent of the total, a much lower level of penetration than is common in developed markets. Nevertheless, ...”
 --Section VI, pg. 166

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OTHER STUDIES

Construction Outlook in China

Construction expenditures in China are expected to grow 9.1% annually through 2014. Nonbuilding construction will be the fastest growing sector, based on state spending on China's transportation infrastructure. Nonresidential building demand growth will slightly outpace the residential sector. This study analyzes the 7.8 trillion yuan construction industry in China, with forecasts for 2014 and 2019 by type, market and region. It also evaluates company market share and profiles industry participants.

#2647 May 2010 \$5300

Roofing

Demand for roofing in the US is forecast to reverse previous declines and grow 2.4% per year through 2014. The residential market will remain dominant and grow the fastest, led by new construction applications. Roofing tile will be the fastest growing product segment, while asphalt shingles remain dominant. This study analyzes the 244 million square US roofing industry, with forecasts for 2014 and 2019 by product, market and region. It also evaluates company market share and profiles industry players.

#2603 February 2010 \$4900

World Cement

Global cement demand will rise 4.1% yearly through 2013. Gains will be fueled by rising infrastructure investment in developing countries and improved markets in developed areas. Blended cement will increase its dominant position over portland. Ready-mix concrete will remain the fastest-growing outlet. This study analyzes the 2.8 billion metric ton world cement industry, with forecasts for 2013 and 2018 by type, market, world region and for 46 countries. It also evaluates company market share and profiles industry participants.

#2591 January 2010 \$6100

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

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 April 2009 \$5200

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