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# World Cement

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Industry Study with Forecasts for **2015 & 2020**

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*Gains will be fueled by rising investments in infrastructure among developing countries, and by a rebound in cement demand in industrialized markets such as the US and Western Europe.*

## World demand to rise 5.3% yearly through 2015

Global demand for hydraulic cement is forecast to rise 5.3 percent per year to 4.3 billion metric tons in 2015, valued at \$335 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, a rebound in cement demand in industrialized markets such as the US and Western Europe will further spur cement sales. However, gains in demand through 2015 will lag the robust advances seen from 2005 to 2010, due in large part to a deceleration in China's cement consumption.

China accounted for 56 percent of world cement demand in 2010. The nation's demand for cement is forecast to climb 4.9 percent per year through 2015 to 2.35 billion metric tons, in line with the regional average. The maturing of the Chinese cement market, combined with a slowdown in the pace of construction spending in the country, will serve to moderate the double-digit yearly demand growth exhibited from 2000 to 2010. The US will post the strongest demand gains of any major cement market. Increases will be stimulated by a robust recovery in residential construction spending. Nonresidential building construction activity in the US will also rise after a period of decline, and nonbuilding construction growth will accelerate, further bolstering overall cement sales.

## World Cement Demand, 2015 (4.3 billion metric tons)



Asia/Pacific  
72%

Africa/Mideast  
12%

Western Europe 5%

Central/S. America 4%

Other Regions 7%

photo: 80 Bregg Hill

## Blended cement to remain dominant product type

Blended cement is expected to continue to account for over 70 percent of all product consumption in 2015, benefiting from its typically lower costs and better environmental profile than straight portland cement. Cement firms are increasing the use of cementitious materials such as fly ash and blast furnace slag in their products, which reduces carbon dioxide emissions from the production of portland cement clinker. The type of cement used varies dramatically. In China, for example, more than 90 percent of demand is attributable to blended cement, while in the US it is less than five percent of demand.

## Ready-mix concrete to be fastest growing market

Ready-mix concrete will be the fastest-growing outlet for cement through 2015 and the largest market, holding a 27 percent share. Construction contractors will be the second largest market, followed by consumer, concrete products and other markets. While ready-mix dominates cement demand in developed world markets such as the US and Japan, in many industrializing countries sales to consumers or construction contractors are more common. This is changing rapidly, particularly in the urban areas of China and India, where the efficiency benefits of ready-mix concrete are allowing it to gain market share.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### India: Cement Supply & Demand

In 2010, cement demand in India reached 218 million metric tons, making it the second largest market in the world behind China. In the past decade, India's strong pace of annual cement sales growth of 10 percent per year from 2000 to 2010 -- has exceeded the global average. Significant and continued expansions in both infrastructure and residential construction activity have spurred associated cement demand. India's cement was both the fastest growing and most widely utilized type, with a 62 percent market share in 2010. Although ready-mix concrete was the fastest growing market, the consumer market for cement to account for the majority of product sales in 2010. The next largest market was construction contractors, followed by concrete products, ready-mix concrete and other applications.

With 2010 industry output of 220 million metric tons, India is the second largest producer of cement in the world behind China. India is also a net exporter like China. However, net exports were only 1 percent of production in 2010. Government restrictions on cement exports and healthy domestic demand led to India importing 2 million metric tons of cement in 2010, mainly from China, Japan and Pakistan. In addition, taxes and government levies on cement are higher in India than other countries in the region.

Demand for cement in India is forecast to climb through 2015 by a healthy 10 percent per year to 300 million metric tons, well below the 400 million metric tons experienced from 2005 to 2010. Sales will be driven by increases in nonbuilding construction and residential building expenditures. Most of the growth will be in January through March. The government announced that it will allocate \$1 trillion for infrastructure projects as part of the Eleventh Five-Year Plan that will be implemented in 2011. Total demand will be fueled by the government's plan to build 5,000 kilometers of new roadway and 100,000 kilometers of new roads -- which is comprised of 5,000 kilometers of new roadway

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**SAMPLE  
TEXT**

TABLE VI-5

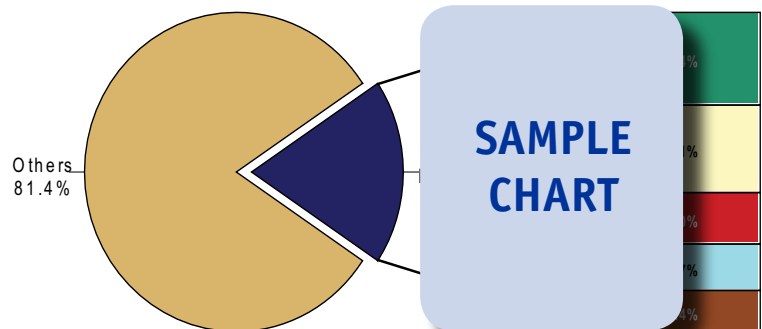
INDIA -- CEMENT SUPPLY & DEMAND  
(million metric tons)

Item	2000	2005	2010	2015	2020
Population (million persons)	1,000	1,100	1,200	1,300	1,400
per capita GDP	1,000	1,500	2,000	2,500	3,000
Gross Domestic Product (bil 2009\$)	1,000	2,000	3,000	4,000	5,000
% construction	10	12	14	16	18
Construction Expenditures (bil 2009\$)	100	200	300	400	500
Nonbuilding	80	160	240	320	400
Nonresidential Building	60	120	180	240	300
Residential Building	20	40	60	80	100
kg cement/capita	20	30	40	50	60
kg cement/000\$ GDP	10	15	20	25	30
kg cement/000\$ construction	100	150	200	250	300
Cement Demand	20	30	40	50	60
net exports	0	0	0	0	0
Cement Production	20	30	40	50	60
% India	10	12	14	16	18
Asia/Pacific Cement Production	100	120	140	160	180

**SAMPLE  
TABLE**

CHART VIII-1

WORLD CEMENT MARKET SHARE, 2010  
(\$235.7 billion)



**SAMPLE  
CHART**



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**OTHER STUDIES**

**World Cement & Concrete Additives**

This study analyzes the world cement and concrete additive industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by type (e.g., minerals, chemicals and fibers), market (e.g., buildings, highways and streets), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2841 .....January 2012 ..... \$5900

**World Construction Aggregates**

This study analyzes the world construction aggregates industry. It presents historical demand data for the years 2000, 2005 and 2010, with forecasts for 2015 and 2020 by product (e.g., crushed stone, sand, gravel), market (nonbuilding, nonresidential, residential), application (e.g., hydraulic concrete, road base and coverings, asphaltic concrete), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2838 .....January 2012 ..... \$5900

**Asphalt**

US demand for asphalt is forecast to rise 7.4 percent annually through 2015, driven primarily by a recovery in new residential construction. Paving products will remain the dominant type and grow the fastest, led by the key asphalt cement segment, as well as by smaller volume products such as emulsified asphalt and polymer-modified asphalts. This study analyzes the 24.4 million metric ton US asphalt industry, with forecasts for 2015 and 2020 by product, market and US region. The study also evaluates company market share and profiles industry players.

#2793 .....October 2011 ..... \$5100

**Precast Concrete Products**

US demand for precast concrete products is forecast to rise 6.1 percent annually through 2015. Residential building will be the fastest growing market, led by foundations, basement walls and floors. Architectural components will be the fastest growing products, spurred by decorative facades, door and window surrounds, and siding. This study analyzes the \$8.4 billion US precast concrete products industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles 34 industry competitors.

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

**Cement & Concrete Additives**

US cement and concrete additive demand will rise 9.9 percent 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

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