World Cement

Industry Study with Forecasts for 2015 & 2020

Study #2805 | November 2011 | $6300 | 439 pages
# Table of Contents

## EXECUTIVE SUMMARY

## MARKET ENVIRONMENT
- General ..................................................  4
- World Economic Overview .............................  5
- Recent Historical Trends ...............................  5
- World Economic Outlook ...............................  7
- World Demographic Overview ........................  11
- Population ..............................................  12
- Urban Population ......................................  13
- World Construction Outlook ...........................  15
- Nonbuilding Construction .............................  17
- Nonresidential Building ...............................  19
- Residential Building ..................................  21
- Pricing Patterns ........................................  24
- Technology Trends .....................................  26
- Legal & Regulatory Environment .....................  28

## WORLD SUPPLY & DEMAND
- General .................................................  32
- Regional Overview ....................................  33
- Demand .................................................  34
- World Cement Production .............................  37
- International Trade ....................................  40
- Demand by Type ........................................  42
- Blended .................................................  45
- Portland .................................................  47
- Other ...................................................  50
- Demand by Market .....................................  51
- Ready-Mix Concrete ....................................  53
- Construction Contractors .............................  55
- Concrete Products .....................................  57
- Consumer ..............................................  59
- Other ...................................................  61

## NORTH AMERICA
- Overview .................................................  64
- Cement Supply & Demand .............................  66
- United States ...........................................  69
- Canada .................................................  75
- Mexico ...................................................  80

## WESTERN EUROPE
- Overview .................................................  86
- Cement Supply & Demand .............................  88
- Italy ......................................................  92
- Germany .................................................  97
- Spain ..................................................... 102
- France ................................................... 107
- Other Western Europe ................................. 112
- United Kingdom ....................................... 118
- Greece ................................................... 118

## ASIA/PACIFIC
- Overview ................................................. 125
- Cement Supply & Demand ............................. 127
- China ..................................................... 131
- India ...................................................... 140
- Vietnam .................................................. 145
- Japan ...................................................... 151
- South Korea ............................................ 156
- Indonesia .............................................. 161
- Thailand ................................................. 166
- Other Asia/Pacific ...................................... 170
- Pakistan .................................................. 175
- Malaysia .................................................. 177
- Philippines ............................................. 178
- Taiwan .................................................... 179
- Australia ................................................. 180
- Other ..................................................... 181

## OTHER REGIONS
- Central & South America ............................. 183
- Overview ................................................. 183
- Cement Supply & Demand ............................. 185
- Brazil ..................................................... 188
- Other Central & South America ...................... 193
- Argentina ................................................. 199
- Colombia .................................................. 199
- Peru ....................................................... 200
- Venezuela ............................................... 201
- Chile ...................................................... 202
- Other ..................................................... 202
- Eastern Europe ......................................... 203
- Overview ................................................. 203
- Cement Supply & Demand ............................. 205
- Russia ..................................................... 208
- Other Eastern Europe .................................. 213
- Poland ..................................................... 218
- Ukraine ................................................... 218
- Romania ................................................... 219
- Czech Republic ......................................... 220
- All Other ................................................ 221
- Africa/Mideast .......................................... 222
- Overview ................................................. 222
- Cement Supply & Demand ............................. 224
- Egypt ...................................................... 228
- Iran ....................................................... 233
- Turkey ..................................................... 238
- Saudi Arabia ............................................ 243
- Other Africa/Mideast ................................... 248
- Algeria .................................................... 254
- Morocco .................................................. 255
- Nigeria .................................................... 256
- South Africa ............................................. 257
- United Arab Emirates ................................ 258
- All Other ................................................ 259

## INDUSTRY STRUCTURE
- General ..................................................... 261
- Industry Composition ................................. 262
- Market Share ............................................. 265
- Product Development & Manufacturing ........... 269
- Marketing & Distribution .............................. 271
- Cooperative Agreements .............................. 272
- Financial Requirements ............................... 279
- Acquisitions & Divestitures ........................... 280

## COMPANY PROFILES
- ACC Limited ............................................ 287
- Ambuja Cements ....................................... 289
- Anhui Conch Cement .................................. 291
- Ash Grove Cement ..................................... 293
- Asia Cement ............................................ 295
- Boral Limited ........................................... 298
- Buzzi Unicem .......................................... 300
- Camargo Corrêa ....................................... 305
- Cementir Holdings .................................... 308
- Cementos Argos ....................................... 312
- CEMEX SAB ............................................. 314
- China National Building Material ................... 322
- China Shanshui Cement ............................... 325
- Cimentos de Portugal ................................ 328
- CRH plc .................................................. 333
- Eagle Materials ......................................... 338
- EUROCEMENT Holding ............................... 340
- Fomentos de Construcciones y Contratas ........ 341
- Grasim Industries ...................................... 345
- HeidelbergCement AG ................................ 347
- Holcim Limited ......................................... 361
- Hyundai Cement ........................................ 377
- Italcementi SpA ......................................... 378
- Lucky Cement Limited ................................ 402
- Mitsubishi Materials ................................... 403
- Nesher Israel Cement ................................. 405
- OYAK Cement Group .................................. 406
- Pretoria Portland Cement ............................. 408
- PT Semen Gresik Persero ............................ 409
- Saudi Cement .......................................... 411
- Siam Cement ............................................ 412
- Ssangyong Cement ..................................... 415
- Sumitomo Osaka Cement .............................. 417
- Taheiyo Cement ........................................ 419
- Tangshan Jidong Cement ............................. 422
- Texas Industries ........................................ 424
- Titan Cement ............................................ 426
- Tongyang Cement & Energy ........................ 429
- Ube Industries .......................................... 430
- Vicat Group ............................................. 432
- Votorantim Participações .............................. 436
List of Tables/Charts

EXECUTIVE SUMMARY
1 Summary Table........................................3

MARKET ENVIRONMENT
1 World Gross Domestic Product by Region......11
2 World Population by Region.....................13
3 World Urban Population by Region.............15
4 World Construction Expenditures by Type & Region......17
5 World Nonbuilding Construction Expenditures by Region........19
6 World Nonresidential Construction Expenditures by Region........21
7 World Residential Building Construction Expenditures by Region........23
8 World Cement Pricing................................26

WORLD SUPPLY & DEMAND
1 World Cement Demand by Region...............36
2 World Cement Demand by Country, 2010..........37
3 World Cement Production by Region.............39
4 World Cement Production by Region, 2010......40
5 World Cement Net Exports by Region..........42
6 World Cement Demand by Type ..................44
7 World Cement Demand by Type, 2010............45
8 World Blended Cement Demand by Region 47
9 World Portland Cement Demand by Region 49
10 World Demand for Other Cement by Region.....51
11 World Demand for Cement by Market..........52
12 World Demand for Cement by Country.........53
13 World Demand for Cement by Region.........54

NORTH AMERICA
1 North America -- Cement Supply & Demand.....65
2 North America -- Cement Supply & Demand by Type & Market........68
3 United States -- Cement Supply & Demand......69
4 United States -- Cement Supply & Demand by Type & Market........71
5 Canada -- Cement Supply & Demand .........77
6 Canada -- Cement Supply & Demand by Type & Market........80
7 Mexico -- Cement Supply & Demand ...........82

ASIA/PACIFIC
1 Asia/Pacific -- Cement Supply & Demand 127
2 Asia/Pacific -- Cement Demand by Type & Market........130
3 Chnt Asia/Pacific Cement Demand by Country, 2010..........131
4 China -- Cement Supply & Demand ..........134
5 China -- Cement Demand by Type & Market........139
6 China -- Cement Demand by Type & Market........141
7 Vietnam -- Cement Supply & Demand .........145
8 Vietnam -- Cement Demand by Type & Market........151
9 Japan -- Cement Supply & Demand ..........153
10 Japan -- Cement Demand by Type & Market........156
11 South Korea -- Cement Supply & Demand ....158
12 South Korea -- Cement Demand by Type & Market........161
13 Indonesia -- Cement Supply & Demand ....163
14 Indonesia -- Cement Demand by Type & Market........166
15 Thailand -- Cement Supply & Demand ..........168
16 Thailand -- Cement Demand by Type & Market........170
7 Other Asia/Pacific -- Cement Supply & Demand by Type & Market........174
8 Other Asia/Pacific -- Cement Demand by Type & Market........175
9 Other Asia/Pacific -- Cement Supply & Demand by Country........175

WESTERN EUROPE
1 Western Europe -- Cement Supply & Demand ....88
2 Western Europe -- Cement Demand by Type & Market........91
3 Italy -- Cement Supply & Demand ...............94
4 Italy -- Cement Demand by Type & Market ....97
5 Germany -- Cement Supply & Demand ..........99
6 Germany -- Cement Demand by Type & Market ....102
7 Spain -- Cement Supply & Demand ..........104
8 Spain -- Cement Demand by Type & Market ....107
9 France -- Cement Supply & Demand ..........109
10 France -- Cement Demand by Type & Market ....113
11 Other Western Europe -- Cement Supply & Demand ..........117
12 Other Western Europe -- Cement Demand by Type & Market ..........117
13 Other Western Europe -- Cement Supply & Demand by Country ..........117

OTHER REGIONS
1 Central & South America -- Cement Supply & Demand ..........185
2 Central & South America -- Cement Demand by Type & Market ..........187
3 Brazil -- Cement Supply & Demand ..........190
4 Brazil -- Cement Demand by Type & Market ..........193
5 Other Central & South America -- Cement Supply & Demand ..........196
6 Other Central & South America -- Cement Demand by Type & Market ..........197
7 Other Central & South America -- Cement Supply & Demand by Country ..........198
8 Eastern Europe -- Cement Supply & Demand ..........205
9 Eastern Europe -- Cement Demand by Type & Market ..........207
10 Other Eastern Europe -- Cement Supply & Demand ..........216
11 Other Eastern Europe -- Cement Demand by Type & Market ..........216
12 Other Eastern Europe -- Cement Supply & Demand ..........216
13 Other Eastern Europe -- Cement Demand by Type & Market ..........216
14 Africa/Mideast -- Cement Supply & Demand by Country ..........217
15 Africa/Mideast -- Cement Demand by Type & Market ..........224
16 Africa/Mideast -- Cement Supply & Demand ..........227
17 Africa/Mideast -- Cement Demand by Type & Market ..........227
18 Egypt -- Cement Supply & Demand ..........230
19 Egypt -- Cement Demand by Type & Market ..........233
20 Iran -- Cement Supply & Demand ..........235
21 Iran -- Cement Demand by Type & Market, 2010 ..........236
22 Turkey -- Cement Supply & Demand ..........240
23 Turkey -- Cement Demand by Type & Market ..........243
24 Saudi Arabia -- Cement Supply & Demand ..........245
25 Saudi Arabia -- Cement Demand by Type & Market ..........248
26 Other Africa/Mideast -- Cement Supply & Demand ..........250
27 Other Africa/Mideast -- Cement Demand by Type & Market ..........253
28 Other Africa/Mideast -- Cement Supply & Demand by Country ..........254

INDUSTRY STRUCTURE
1 World Cement Sales by Company, 2010........264
2 Chnt World Cement Market Share, 2010 ..........266
3 Selected Cooperative Agreements ..........274
4 Selected Acquisitions & Divestitures ..........281
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.

**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.
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. Over the past decade, India’s strong pace of annual cement sales growth -- at 8.3 percent per year from 2000 to 2010 -- has exceeded the global average. Significant and continued expansions in both infrastructure and industrial construction activity have spurred associated cement demand. Blended cement was both the fastest growing and most widely utilized cement type, with a 62 percent market share in 2010. Although ready-mix concrete was the fastest growing market, the consumer market continued 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, as well as a net exporter like China. However, net exports were only equivalent to one percent of production in 2010. Government restrictions on exports and healthy domestic demand led to India importing 2.4 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 5.5 percent per year to 285 million metric tons, well below the near double-digit annual increases experienced from 2005 to 2010. Sales will be driven by increases in nonbuilding and residential construction expenditures. Most notably, in January 2011, the Indian government announced that it will allocate $1 trillion for infrastructure investments as part of the Eleventh Five-Year Plan that begins in 2012. Additional demand will be fueled by Phase IV D -- which is comprised of 5,000 kilometers of new roadways.

Demand for cement in India is forecast to climb through 2015 by a healthy 5.5 percent per year to 285 million metric tons, well below the near double-digit annual increases experienced from 2005 to 2010. Sales will be driven by increases in nonbuilding and residential construction expenditures. Most notably, in January 2011, the Indian government announced that it will allocate $1 trillion for infrastructure investments as part of the Eleventh Five-Year Plan that begins in 2012. Additional demand will be fueled by Phase IV D -- which is comprised of 5,000 kilometers of new roadways.

**TABLE VI-5**

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<td>1105</td>
<td>1186</td>
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<td>per capita GDP</td>
<td>1980</td>
<td>2500</td>
<td>3520</td>
<td>4830</td>
<td>6390</td>
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<td>Gross Domestic Product (bil 2009$)</td>
<td>2020</td>
<td>2767</td>
<td>4171</td>
<td>6110</td>
<td>8575</td>
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<td>% construction</td>
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<td>17.3</td>
<td>18.0</td>
<td>18.9</td>
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<td>Construction Expenditures (bil 2009$)</td>
<td>296.3</td>
<td>486.3</td>
<td>722.0</td>
<td>1100.0</td>
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<td>221.7</td>
<td>355.0</td>
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<td>Nonresidential Building</td>
<td>104.1</td>
<td>180.8</td>
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<td>402.0</td>
<td>586.0</td>
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<td>Residential Building</td>
<td>107.0</td>
<td>157.0</td>
<td>230.1</td>
<td>343.0</td>
<td>505.0</td>
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<td>kg cement/capita</td>
<td>96</td>
<td>124</td>
<td>184</td>
<td>225</td>
<td>272</td>
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<td>kg cement/000$ GDP</td>
<td>48.6</td>
<td>49.5</td>
<td>52.3</td>
<td>46.6</td>
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<td>kg cement/000$ construction</td>
<td>331</td>
<td>282</td>
<td>302</td>
<td>259</td>
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<td>Cement Demand</td>
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<td>net exports</td>
<td>1.3</td>
<td>5.7</td>
<td>2.0</td>
<td>5.0</td>
<td>8.0</td>
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<td>Cement Production</td>
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<td>% India</td>
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<td>Asia/Pacific Cement Production</td>
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Sample Profile, Table & Forecast

China Shanshui Cement Group Limited
Sunnsy Industrial Park, Gushan Town, Changqing District, Jinan, Shandong China
86-531-8836-0218
http://www.shanshuigroup.com

Sales: $1.8 billion (2010)
Key Products: ordinary silicate cement, slag cement and clinker

China Shanshui Cement Group Limited is a leading producer of cement in China. The Company has major operations in Shandong, Hehei, Tianjin and Liaoning, China.

The Company’s principal products are ordinary silicate cement, slag cement and clinker. In addition, China Shanshui Cement makes low- and high-grade cement types, all of which are marketed under the SHANSHUI DONGYUE tradename. SHANSHUI DONGYUE cement is used in construction works for roads, bridges, housing and other types of construction projects. In 2009, China Shanshui Cement sold 29.4 million metric tons of cement and 8.4 million metric tons of clinker. In 2009, the Company had the capacity to produce 48.3 million metric tons of cement and 25.2 million metric tons of clinker.

According to China Shanshui Cement, the Company was the largest cement producer in the Shandong and Liaoning provinces of China in 2009, where China Shanshui Cement operates numerous clinker production lines and cement grinding lines. In Shandong, the Company’s cement-producing subsidiaries include the following firms, all of which operate plants at their respective headquarters sites: Anqiu Shanshui

**TABLE VI-6**

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<td>Asia/Pacific Cement Demand</td>
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<td>% India</td>
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<td>Portland</td>
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<td>Other</td>
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<td>By Market:</td>
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<td>Ready-Mix Concrete</td>
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<td>Other</td>
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“Cement output by facilities in India is forecast to climb 5.7 percent annually to 290 million metric tons in 2015, approximating domestic demand growth, but decelerating from the robust pace of growth exhibited from 2005 to 2010. Production will be spurred by strong increases in nonbuilding, nonresidential building and residential building spending and associated cement demand. In addition, many of the large cement producers have undertaken projects that will increase manufacturing capacity within India’s borders.” --Section VI, pg. 143
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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, asphalts, 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 ................. October 2011 ................... $5100

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 ................. March 2011 ...................... $4800

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 ................. July 2010 ......................... $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

About The Freedonia Group
The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

• Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

Freedonia Custom Research
Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company’s specific needs, companies harness Freedonia’s research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia’s team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.