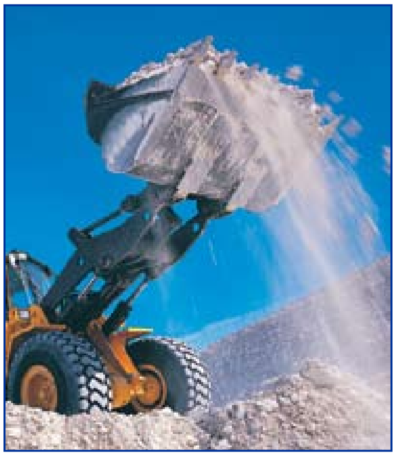

World Construction Aggregates

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

Study #2838 | January 2012 | $5900 | 334 pages

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World Construction Aggregates

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Demand through 2015 will rise at a slower rate of growth than during the 2005-2010 period, reflecting a moderation in aggregates-intensive nonbuilding construction activity.

World demand to rise 5.2% annually through 2015

The global market for construction aggregates is expected to increase 5.2 percent per year through 2015 to 48.3 billion metric tons. This represents a slower rate of growth than during the 2005-2010 period, reflecting a moderation in aggregates-intensive nonbuilding construction activity. Nevertheless, demand for construction aggregates will still post solid gains from 2010 to 2015.

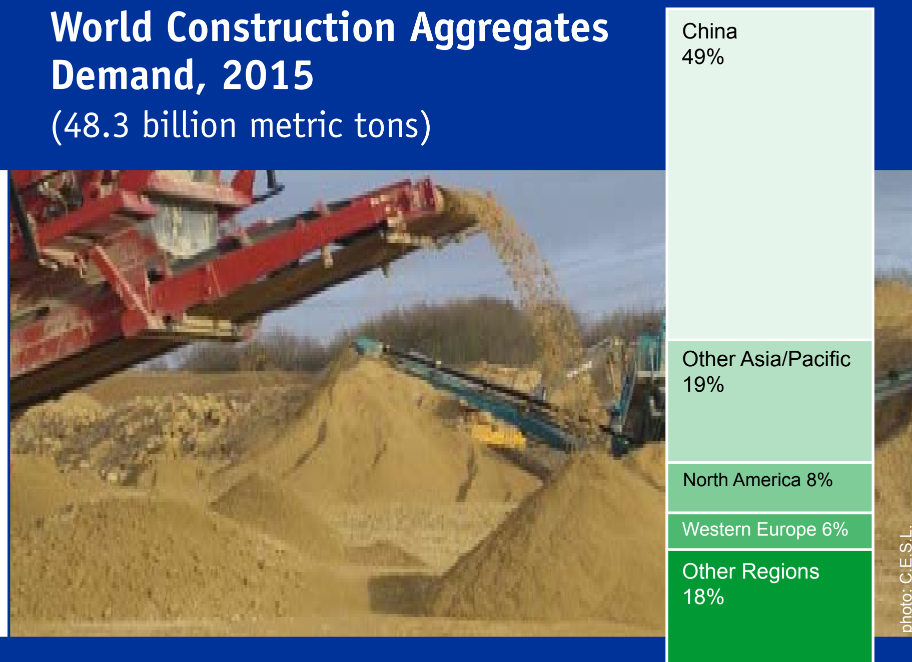
Asia/Pacific region to register largest increases

The Asia/Pacific region will register the largest increases in product sales, as construction activity will rise rapidly, particularly in China and India. China alone will account for half of all new aggregates demand worldwide during the 2010-2015 period.

Eastern Europe and the Africa/Mideast region are also expected to undergo significant growth in consumption of construction aggregates, stimulated by infrastructure development projects and strong growth in general economic activity. While the Central and South America market will climb at a somewhat slower pace, aggregates suppliers will benefit from gains in regional construction spending.

Expansions in demand in developed parts of the world -- the US, Canada, Japan, Western Europe, South Korea and Australia -- will not be as strong as in most industrializing areas. This is primarily due to the already well-developed infrastructures found in these countries and the construction methods utilized, which tend to feature less concrete. However, most developed world markets, driven by an acceleration in GDP growth and sharp rebounds in construction spending in North America and Western Europe, will post solid gains after contracting in many nations from 2005 to 2010.

World Construction Aggregates Demand, 2015
(48.3 billion metric tons)



Recycled, secondary aggregates to grow fastest

Demand for crushed stone, sand and gravel products will post similar growth rates of just over five percent per year through 2015. As in 2010, sand will continue to make up the largest portion of global sales, followed closely by crushed stone and then gravel. Due to more restrictive land use and environmental regulations, as well as the depletion of natural aggregates reserves, sales of recycled, secondary and other aggregates will climb at an above-average pace during the 2010-2015 period. However, despite projected growth of 7.1 percent per year over this span, these products will continue to play a small role in world markets due to quality concerns and limitations in the availability of feed material.

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Sample Text, Table & Chart

TABLE VI-5

**INDIA:
CONSTRUCTION AGGREGATES MARKET ENVIRONMENT**

Item	2000	2005	2010	2015	2020
Population (millions)					
per capita GDP					
Gross Domestic Product (bil 2009$)					
% construction					
Construction Expenditures (bil 2009$)					
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					
Region Aggregates Demand (mil m tons)					

SAMPLE TABLE

ASIA/PACIFIC

India: Construction Aggregates Demand

In 2010, the Indian market for construction aggregates w billion metric tons, representing the second largest national m the world behind China. Between 2005 and 2010, sales of co aggregates products in India grew 9.3 percent, spurred by hig construction activity. Especially strong was nonbuilding and tial building spending, due to rapid infrastructure expansion a capital investment. Nevertheless, intensity of aggregates use to India's population is low -- well below regional and world -- reflecting its severe infrastructural needs.

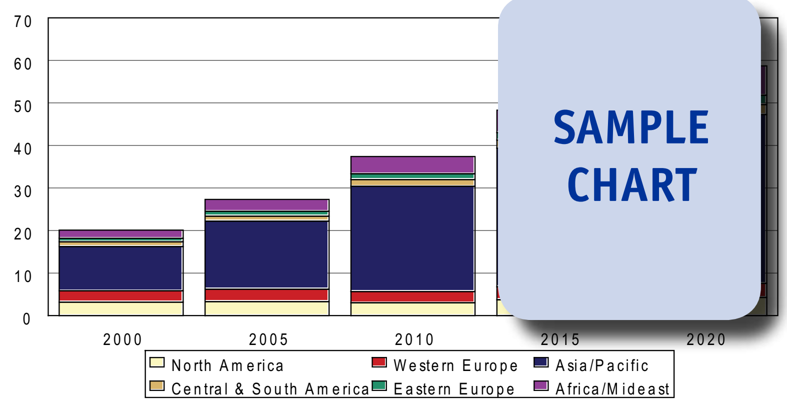
Representing two-fifths of all aggregates sales in India, stone is the most commonly utilized type of construction agg followed by sand and gravel, each of which accounted for 29 demand in 2010. Recycled, secondary and other aggregates only three percent of all aggregates sales in the same year, bu ment is growing at a rapid pace, increasing 7.0 percent per ye 2005 to 2010. The majority of aggregates production in India is in the hands of small and medium-sized companies, which include such firms as Blue Aggregates and SRS Group. Lafarge is the only major foreign multinational with significant quarrying operations in India.

Demand for construction aggregates in India is expected to increase 3 billion metric tons, worldwide. This gro in nonbuilding acti and by volume. Thi a sizable increase in aggregate use from 2010 to 2015, as spending on both new s and maintenance of existing structures will expand. Buildin tion will post solid gains as well, further boosting aggregates India.

SAMPLE TEXT

CHART III-1

**WORLD CONSTRUCTION AGGREGATES DEMAND BY REGION
(billion metric tons)**



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

Sample Profile, Table & Forecast

TABLE VI-6

INDIA: CONSTRUCTION AGGREGATES DEMAND
(million metric tons)

Item	2000	2005	2010	2015	2020
Construction Expenditures (bil 2009$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
m tons aggregates/000$ construction	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Construction Aggregates Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Type:					
Sand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Crushed Stone	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Gravel	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Market:					
Nonbuilding Construction	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nonresidential Bldg Construction	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Residential Building Construction	[illegible]	[illegible]	[illegible]	[illegible]	585

SAMPLE TABLE

COMPANY PROFILES

NCC AB
Vallgatan 3
170 80 Solna
Sweden
46-8-58[illegible]
http://w[illegible]

Sales: $[illegible]
Employ[illegible]

Key Pro[illegible] [illegible]nd, clay and gravel; and wash[illegible]

SAMPLE PROFILE

NCC develops and builds residential and commercial properties, industrial facilities and public buildings, roads, civil engineering structures and other types of infrastructure. The Company also produces materials used in construction, including aggregates and asphalt, and conducts paving and road services. NCC does business through five segments: NCC Construction, NCC Roads, NCC Housing, NCC Property Development and Other.

The Company is active in the world construction aggregates industry through the NCC Roads segment, which had 2010 sales of $1.4 billion. Of the segment's 2010 sales, Sweden accounted for 49 percent, Denmark represented 19 percent, Finland accounted for twelve percent, Norway represented 18 percent and Russia accounted for two percent. The NCC Roads segment produces and sells aggregates and asphalt, and provides paving and road services. Of the segment's 2010 sales, aggregates accounted for 19 percent, or approximately $265 million.

Through the NCC Roads segment, NCC AB produces aggregates under the BALLAST brand name. Among the Company's aggregates

295

"Sales of construction aggregates in the Asia/Pacific region are forecast to climb 5.7 percent per annum to 32.6 billion metric tons in 2015, slowing from the torrid 2005-2010 pace but maintaining the regional market's position as the fastest growing worldwide. This expansion will again be driven by solid advances in economic activity and construction spending. Many major construction projects are planned for the period between 2010 and 2015 and beyond, including ..."
--Section VI, pg. 125-6

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Other Studies

Geosynthetics

US geosynthetics demand is forecast to increase 6.6 percent per year to 1.3 billion square yards in 2017, spurred by improved spending on the construction of structures and roads. Geotextiles will remain the largest segment, while more application-specific products (e.g., geogrids, geonets, geosynthetic clay liners, geofoams) will grow the fastest. This study analyzes the 912 million square yard US geosynthetics industry, with forecasts for 2017 and 2022 by product, market and region. The study also evaluates company market share and profiles industry players.

#3003 .... March 2013................... $5100

Green Building Materials

US green building materials demand is forecast to increase 11 percent annually to $86.6 billion in 2017. Permeable pavement and structural products (e.g., recycled concrete, FSC-certified lumber) will grow the fastest. Exterior products such as energy-efficient windows and green roofing will remain the largest segment. This study analyzes the $51.8 billion US green building material industry, with forecasts for 2017 and 2022 by product, market and US region. The study also considers market environment factors and profiles industry participants.

#2995 .... February 2013................. $5100

World Cement & Concrete Additives

World demand for cement and concrete additives is projected to increase 8.3 percent annually to $15.8 billion in 2015. Gains will be bolstered by cement markets in developed regions, which consume much higher volumes of additives per ton of cement than many of the largest cement markets in developing regions. This study analyzes the $10.6 billion world cement and concrete additive industry, with forecasts for 2015 and 2020 by type, market, world region and for 21 countries. The study also evaluates company market share and profiles industry players.

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

World Cement

Global demand for hydraulic cement will rise 5.3 percent annually through 2015. Growth in the dominant Chinese market will slow while the US posts the strongest gains of any major market. Blended cement will remain the dominant product type, while ready-mix concrete will be the fastest-growing outlet and largest market. This study analyzes the 3.3 billion metric ton world cement industry, with forecasts for 2015 and 2020 by product, market, world region and for 46 major countries. The study also evaluates company market share and profiles industry participants.

#2805 .... November 2011 .... $6300

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

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