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World Construction Aggregates

Industry Study with Forecasts for **2017 & 2022**

Study #3078 | December 2013 | $6100 | 418 pages

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NORTH AMERICA

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OTHER REGIONS

INDUSTRY STRUCTURE

Demand will rebound in North America and Western Europe, but the global market will continue to be driven by above average growth in the large Asia/Pacific and Africa/Mideast regions.

World sales to rise 5.8% annually through 2012

Through 2017, worldwide sales of construction aggregates are forecast to expand 5.8 percent per year to 53.2 billion metric tons. Following recent declines from 2007 to 2012, aggregates demand is expected to rebound in North America and Western Europe. Eastern Europe is also expected to register faster growth. However, the global market will continue to be driven by above average growth in the large Asia/Pacific and Africa/Mideast regions. The nonbuilding market for construction aggregates is expected to outperform the building segment through 2017, as many countries will invest heavily in their public infrastructures.

World Construction Aggregates Demand, 2017
(53.2 billion metric tons)

Demand growth in India to outpace growth in China

Between 2012 and 2017, more than 50 percent of all additional construction aggregates demand generated will be attributable to China, where massive gains in building and nonbuilding construction activity will stimulate demand. However, as the Chinese market matures, growth is expected to decelerate noticeably from the breakneck pace of the last decade. Aggregates consumption in India, the Asia/Pacific region's second largest market, will expand at a somewhat faster pace than China through 2017.

Following several years of losses during the recession-plagued 2007-2012 period, the construction aggregates markets of Eastern Europe, North America, and Western Europe are projected to expand between three and five percent per annum through 2017. As these regions recover from financial and fiscal crises, residential, commercial, and public works construction activity will rebound, generating additional demand for aggregates. Eastern Europe and North America will record somewhat faster growth than Western Europe during the 2012-2017 period. In terms of major countries, Spain, Russia, the United States, and Italy are expected to perform particularly well, as there is a considerable amount of pent-up aggregates demand in each of these markets.

Crushed stone to remain dominant aggregate type

The crushed stone segment is expected to account for over one-half of all new product demand generated between 2012 and 2017. Crushed stone will continue to benefit from its numerous performance features, such as durability and strength. Crushed stone is also projected to gain a larger share of the aggregates market due to the depletion of sand and gravel reserves in many countries around the world, including China, India, Japan, and Norway. However, this trend toward crushed stone will be moderated by the increasing availability of manufactured sand and alternative and recycled aggregates.

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Sample Text, Table & Chart

TABLE VI-3

CHINA: CONSTRUCTION AGGREGATES MARKET ENVIRONMENT

Item	2002	2007	2012	2017	2022
Population (millions)	1				39
per capita GDP					0
Gross Domestic Product (bil 2011$)					0
$ construction/000$ GDP					4
Construction Expenditures (bil 2011$)					5
Residential					0
Nonresidential					8
Nonbuilding					7
m tons aggregates/capita					3
m tons aggregates/mil $ GDP					4
m tons aggregates/000$ construction					2
Aggregates Demand (mil metric tons)					0
% China					4
Asia/Pacific Aggregates (mil m tons)	10				30

SAMPLE TABLE

ASIA/PACIFIC

China: Construction Aggregates Demand

With 20 ... billion metric to had world's ... market. That yea counted for ... gates demand an of global ag ... world's leading c these produ ... my and construct and large de ... e intensiveness c use in the co ... opulation size, an tion expenditures -- is very high compared to other Asia/Paci tries because China has invested heavily in aggregates-intens infrastructure projects and its building stock during the last d Aggregates sales in China in 2012 were nearly six times grea India (the world's second largest market), a country that is co terms of population.

SAMPLE TEXT

Both sand and crushed stone are widely used in China. these two product types accounted for more than three-fourths of all aggregates sales in 2012. Because the country possesses large reserves of crushed stone and sand, the market share of gravel is slightly lower than in the Asia/Pacific region as a whole. China is the world's biggest consumer of alternative, secondary, and recycled aggregates because of the sheer size of its market. However, these products account for a lower share of overall aggregates sales than in most other Asia/Pacific countries.

From 2007 to 2012, demand for construction aggregates in China rose more than 11 percent annually, the fastest rate of increas wide. Aggregates consumption expanded rapidly, as nonbui dential building, and nonresidential building construction ac country each grew between 15 and 17 percent per year durin A large number of important construction projects were initi 2007 and 2012, including the Kashgar-Hotan Railway, Harb

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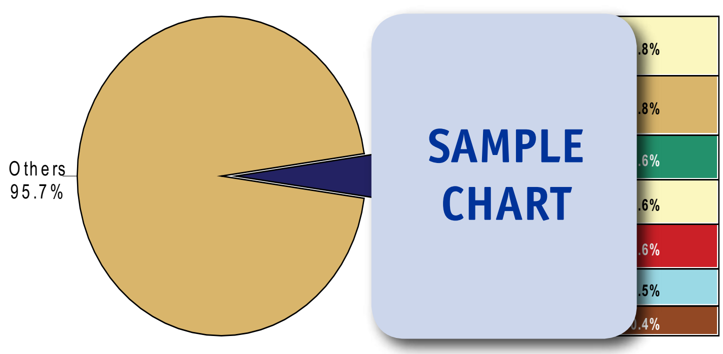
CHART VIII-1

WORLD CONSTRUCTION AGGREGATES MARKET SHARE ($308.0 billion, 2012)



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Sample Profile, Table & Forecast

TABLE VI-4

CHINA: CONSTRUCTION AGGREGATES DEMAND
(million metric tons)

Item	2002	2007	2012	2017	2022
Construction Expenditures (bil 2011$)					
m tons aggregates/000$ construction					
Construction Aggregates Demand					
By Type:					
Crushed Stone					
Sand					
Gravel					
Other Types					
By Market:					
Residential Construction					
Nonresidential Construction					
Nonbuilding Construction					
By Application:					
Hydraulic Concrete					
Road Base & Coverings					
Asphaltic Concrete					
Other Applications					

SAMPLE TABLE

COMPANY PROFILES

Rettig Group Limited
Bulevardi 46
00121 Helsinki
Finland
358-9-61
http://w

Sales: $)
Geograp nd 26%, Other
Europea ountries 5%, and
Other C
Employ y)

SAMPLE PROFILE

Key Products: crushed and powdered limestone, quicklime, and slaked lime

Rettig Group is a privately held manufacturer of heat emitters, underfloor heating systems, valves and controls, and limestone-based construction products. The Company also owns a fleet of ocean-going vessels. Rettig Group does business through four segments: Rettig Indoor Climate Comfort, Bore, Nordkalk, and Other.

The Company competes in the worldwide construction aggregates industry through the Nordkalk segment, which had 2012 sales of $451 million. The segment, which employed 1,170 in 2012, consists of the operations of Nordkalk Corporation (Finland), including the production and sale of NORDKALK limestone and other aggregates. Nordkalk produces limestone in crushed and powdered forms. The company's crushed limestone can be used as a raw material in the production of cement and hydraulic concrete. Applications for Nordkalk's powdered limestone include the production of mortar, cement , and asphaltic

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STUDY COVERAGE

This Freedonia study, ***World Construction Aggregates***, offers historical data (2002, 2007, 2012) plus projections (2017 and 2022) for supply and demand, as well as demand by type, market and application in six regions and 29 major countries. The study also details key market environment factors, evaluates company market share, and profiles 31 global players.

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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 (2002, 2007, 2012) and forecasts for 2017 and 2022 by type (e.g., water reducers, set controllers, coloring agents, air entrainers, blast furnace slag, gypsum, fly ash, silica fume, 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.

#3118 .... March 2014................... $6100

World Asphalt

This study analyzes the world asphalt industry. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 for primary asphalt, asphalt products (e.g., paving, roofing), world regions and major countries. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3129 .... February 2014................. $6300

World Cement

World sales for cement are forecast to expand more than five percent annually through 2017 to over 4.7 billion metric tons. Demand will rebound sharply in North America and Western Europe, while growth in China will decelerate yet still achieve impressive gains. Blended cement will account for over three-fourths of all new demand. This study analyzes the 3.7 billion metric ton world cement industry, with forecasts for 2017 and 2022 by type, market, world region, and for 45 countries. The study also evaluates company market share and profiles industry participants.

#3096 .... October 2013 .... $6400

Construction Outlook in China

Construction expenditures in China are expected to rise 8.5 percent per annum in real terms through 2017. Nonbuilding construction of transportation infrastructure and utility projects will see the fastest growth.The Central-East region will remain the largest market while the Northwest region will grow the fastest. This study analyzes the 13.3 trillion yuan construction industry in China, with forecasts for 2017 and 2022 by market, application, and geographic region. The study also evaluates company market share and profiles industry participants.

#3035 .... July 2013.................... $5300

World Industrial Silica Sand

Global demand for industrial silica sand will grow 4.8 percent annually to 280 million metric tons in 2016, valued at $9.2 billion. Glass and foundries will remain the largest markets, while faster gains will be seen in the developing hydraulic fracturing sector. The Americas will be the fastest growing regional markets. This study analyzes the 222 million metric ton world silica sand industry, with forecasts for 2016 and 2021 by market, world region, and for 18 major countries. The study also evaluates company market share and profiles industry participants

#2940 .... October 2012 .... $5900

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