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World Cement

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

Study #3096 | October 2013 | \$6400 | 480 pages

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Cement consumption is expected to rebound sharply in North America and Western and Eastern Europe, while growth in China is expected to slow noticeably after more than a decade of rapid gains.

World sales to rise 5.3% annually through 2017

Worldwide sales of cement are forecast to expand more than five percent per annum through 2017 to 4.7 billion metric tons, a slight deceleration from the 2007-2012 pace. Following severe declines from 2008 to 2011 and stagnating demand in 2012, cement consumption is expected to rebound sharply in North America and Western Europe. Eastern Europe will perform much better as well. While growth in China is expected to decelerate noticeably between 2012 and 2017 after more than a decade of rapid gains, demand for cement in the rest of the Asia/Pacific region will accelerate.

Nonbuilding segment to be fastest growing market

The nonbuilding segment of the global cement market is expected to outperform its counterparts, as governments in both developed and industrializing countries invest heavily in their public infrastructures. Sales of cement for residential applications are expected to rise due to population growth and increased demand for housing in urban areas in industrializing countries. In addition, the housing sectors of the US and Western Europe are expected to recover from a period of turmoil. Accelerating worldwide economic growth will boost demand for commercial, industrial, and retail properties, leading to an uptick in cement sales for nonresidential applications.

World Cement Demand, 2017 (4.7 billion metric tons)



China alone to claim over half of all new demand

More than 50 percent of all additional cement demand generated between 2012 and 2017 will be attributable to China, the world's leading consumer of cement. Product sales in China are projected to rise nearly five percent per year during this period. As the Chinese cement market matures, growth is expected to decelerate from the double-digit pace of the last decade. However, in absolute terms, cement consumption will still increase substantially through 2017, as massive gains in building and nonbuilding construction activity in the country will stimulate product demand.

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

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Cement Supply & Demand

Demand for cement in China totaled 2.1 billion metric tons accounting for 57 percent of global consumption. China is the leading consumer of cement because of its massive economy, infrastructure, and construction industry. The country has also experienced rapid industrialization during the last decade. Construction of buildings of all types and the utility, transportation, and distribution infrastructure has soared. As a result, the intensity of cement use -- gauged against GDP, building construction expenditures, and population size -- is very high by global standards. In 2012, cement consumption in China was nearly nine times greater than in the world's second largest market, India, a country that is comparable in terms of population.

From 2007 to 2012, cement consumption in China increased 15 percent per annum, one of the fastest growth rates worldwide. Residential building construction activity in China increased between 15 and 17 percent per year during the 2007-2012 period. A multitude of major construction projects were carried out during the 2007-2012 period, including the Shanghai Synchrotron Radiation Laboratory, Hainan Power Grid, Kashgar-Hotan Railway, Harbin-Dalian High-Speed Railway, Shanghai World Financial Center, and the Qinling Tunnel projects.

Shipments of cement from plants in China amounted to more than 2 billion metric tons in 2012, representing almost 58 percent of global cement supply. China is the largest supplier of cement in the world. In 2012, China's cement production increased 15 percent from its Eleventh Five-Year Plan (2006-2010) target. China's cement production is expected to increase 10 additional production lines per annum because of a government policy to increase production in 2012. China recorded a surplus of 1.5 billion metric tons in 2012. While large in absolute terms, the surplus is small relative to the world's total production of 150 billion metric tons in 2012.

150

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**SAMPLE
TEXT**

TABLE VI-3

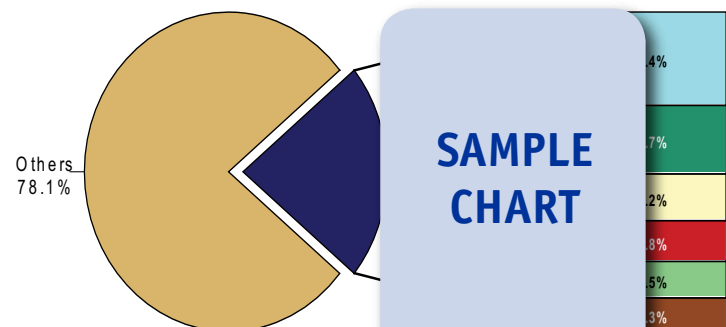
CHINA: CEMENT SUPPLY & DEMAND (million dollars)

Item	2002	2007	2012	2017	2022
Population (million persons)					1,320
per capita GDP					1,000
Gross Domestic Product (bil 2011\$)					10,000
% construction					3
Construction Expenditures (bil 2011\$)					10,000
Residential Building					5,000
Nonresidential Building					5,000
Nonbuilding					0
kg cement/capita					2
kg cement/000\$ GDP					2
kg cement/000\$ construction					8
Cement Demand					10,000
net exports					5
Cement Production					15,000

**SAMPLE
TABLE**

CHART VIII-1

WORLD CEMENT MARKET SHARE BY COMPANY (\$260 billion, 2012)

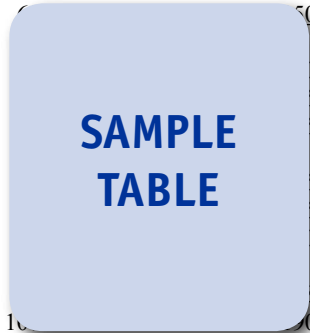


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-5
CHINA: CEMENT DEMAND BY TYPE & MARKET
 (million metric tons)

Item	2002	2007	2012	2017	2022
Cement Demand					
By Type:					
Blended					
Portland					
Other					
By Market:					
Residential Building					
Nonresidential Building					
Nonbuilding					
% China					
Asia/Pacific Cement Demand					



COMPANY PROFILES

Pretoria Portland Cement Company Limited
 PPC Building, Barlow Park
 180 Katherine Street
 Sandton 2146
 South Africa
 27-11-38
 http://www

Revenue
 Employ

Key Products: fly ash cement, and blended c

SAMPLE PROFILE

Pretoria Portland Cement (PPC) is a leading manufacturer of cement and construction materials in South Africa. PPC operates in three segments: Cement, Lime, and Aggregates.

The Company is active in the world cement industry via the Cement segment, which does business as PPC Cement Proprietary Limited (South Africa), a wholly owned subsidiary. PPC Cement had FY 2012 revenues of \$803 million, of which South Africa accounted for \$626 million and other African countries represented \$177 million. Cement products from the company include SUREBUILD and OPC general purpose Type I portland cement, UNICEM general purpose Type II portland cement, and BOTCEM fly ash cement. In FY 2012, PPC Cement introduced SUREROAD blended cement, which is made specifically for road construction applications. The company also makes cementitious mortars and other cement based building materials.

PPC Cement has cement facilities in South Africa, Botswana, and Zimbabwe. In FY 2012, these plants had the combined capacity to

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STUDY COVERAGE

This Freedonia study, **World Cement**, offers historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 in metric tons for cement production; demand by product type by market; and net exports by country for 6 regions and 45 countries. The study also assesses key market environment factors, evaluates company market share and profiles 36 competitors in the world cement industry.

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OTHER STUDIES

World Asphalt

World demand for asphalt is projected to rise 3.6 percent annually through 2017 from a weak 2012 base to 121 million metric tons. The Asia/Pacific region has overtaken North America as the largest regional market and will continue to record the fastest advances, driven primarily by strong growth in China and India. This study analyzes the 101.2 million metric ton world asphalt industry, with forecasts for 2017 and 2022 for primary asphalt, asphalt products, world regions and 24 countries. The study also evaluates company market share and profiles industry players.

#3129 February 2014 \$6300

Fiber Cement

US fiber cement demand is forecast to rise 8.5 percent annually through 2017 to 2.9 billion square feet, valued at \$2.2 billion. The new residential market will grow the fastest as housing starts rise and home builders specify fiber cement siding and trim because it can look like brick and stone, and is perceived as more attractive than vinyl. This study analyzes the 1.9 billion square foot US fiber cement industry, with forecasts for 2017 and 2022 by material, application, market and US region. The study also evaluates company market share and profiles industry players.

#3128 January 2014 \$5100

World Construction Aggregates

World sales of construction aggregates will rise 5.8 percent annually to 53.2 billion metric tons in 2017. The Asia/Pacific region will remain the dominant market and grow the fastest. Crushed stone and other aggregates will offer the best prospects. Hydraulic cement will continue to be a key application. This study analyzes the 40.2 billion metric ton world construction aggregates industry, with forecasts for 2017 and 2022 by type, market, application, world region, and for 28 countries. The study also evaluates company market share and profiles industry players.

#3078 December 2013 \$6100

Asphalt

US demand for asphalt is forecast to increase 3.7 percent annually to 27.9 million tons in 2017. Paving products will remain the dominant application and will grow the fastest, driven in the short term by federal highway funding. Demand for asphalt roofing products will be spurred by the rebound in building construction expenditures. This study analyzes the 23.3 million ton US asphalt industry, with forecasts for 2017 and 2022 by product, market and region. The study also evaluates company market share and profiles industry players.

#3062 August 2013 \$5300

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

About The Freedonia Group

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