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World Cement

Industry Study with Forecasts for **2019 & 2024**

Study #3303 | August 2015 | $6500 | 492 pages

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Industry Study with Forecasts for ***2019 & 2024***

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INDUSTRY STRUCTURE

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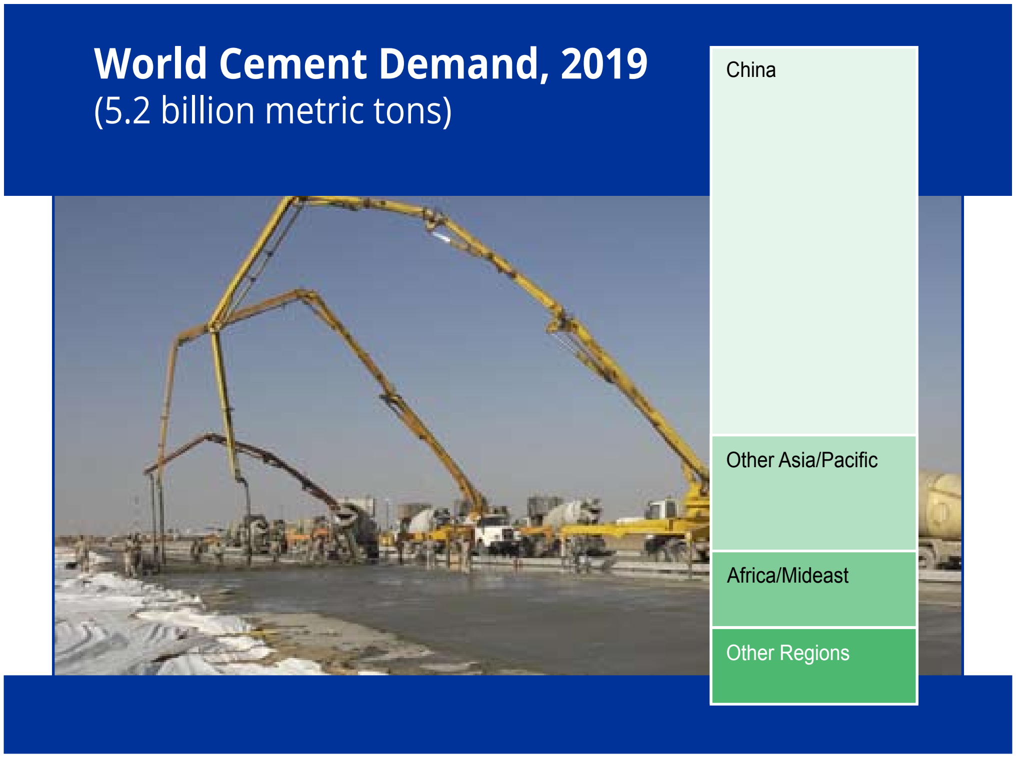
Gains will continue to be driven by healthy construction activity in the developing countries of the Asia/Pacific and Africa/Mideast regions, with the massive Chinese market remaining the largest driver of growth.

World demand to rise 4.5% annually through 2019

World demand for cement is projected to rise 4.5 percent per year to 5.2 billion metric tons in 2019. Gains will continue to be driven by healthy increases in construction activity in developing countries throughout the Asia/Pacific and Africa/Mideast regions. The massive Chinese market will continue to be the largest driver of growth, accounting for over half of the increase in global cement demand through 2019. North America will also post strong gains as the US construction industry continues to recover from recessionary conditions.



India to be fastest growing major national market

India is expected to post the fastest growth in cement demand of any major national market, advancing 8.0 percent per year through 2019. Many other developing countries in the Asia/Pacific region will post similarly strong growth, including Vietnam, Indonesia, and Pakistan. The pace of gains in China will slow considerably from that of recent years, and growth in cement demand will actually trail the global average. After years of rapid growth, intensity of cement consumption in China -- relative to population, GDP, and construction spending -- has reached extremely high levels. Because the demand base is already so large, previous growth rates are likely unsustainable, and advances will slow as the market matures.

Demand for cement in North America will advance at a healthy clip, primarily due to recovery in the US market. While US demand for cement already has benefited from a post-recession rebound, consumption in 2014 remained well below 2004 levels, leaving significant room for continued recovery. Demand for cement in both Western Europe and Eastern Europe will also benefit from recovery in various countries that have experienced recent economic turmoil. Countries such as Spain, Italy, and Ukraine will all achieve significantly improved performances relative to contractions that occurred between 2004 and 2014. However, growth in these regions will still trail the global average.

Market growth to vary by regional development level

At the global level, consumption of cement in the residential building, nonresidential building, and nonbuilding construction markets is expected to grow at similar rates through 2019, but there will be substantial variation across regions. For example, the nonbuilding construction market will be the fastest growing in the Asia/Pacific region. The lack of transportation and energy infrastructure in much of the region leaves significant room for increased investment in development. Conversely, in developed areas such as North America and Western Europe the nonbuilding construction market will lag.

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Sample Text, Table & Chart

TABLE VI-19

SOUTH KOREA: CEMENT SUPPLY & DEMAND
(million metric tons)

Item	2004	2009	2014	2019	2024
Population (million)					
GDP/capita					
Gross Domestic Product (bil 2013$)					
% construction					
Construction Expenditures (bil 2013$)					
Residential Building					
Nonresidential Building					
Nonbuilding					
kg cement/capita					
kg cement/000$ GDP					
kg cement/000$ construction					
Cement Demand					
net exports					
Cement Production					

Source: The Freedonia Group, Inc.

SAMPLE TABLE

ASIA/PACIFIC

South Korea: Cement Market Outlook

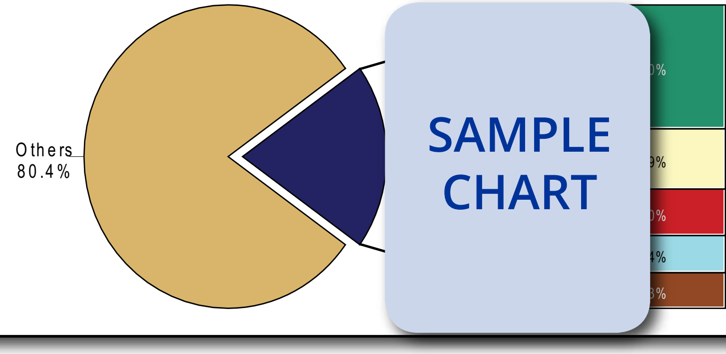
Demand for cement in South Korea is projected to adva
percent per year ... in 2019. While t
mance will be w... age, it will still r
an improvement ... tween 2009 and
strongest growt... construction mar
also suffered the ... receding five yea
South Korean g... increasing inves
frastructure deve... portation projects s
and railways. The residential building construction market w
more slowly. Slow population growth will limit the need for
ing construction, and high urbanization rates leave little roon
associated with urban migration. Growth in the nonresidenti
market will also be modest, although construction of retail ar
cial structures will allow for some improvement relative to th
ness of the 2009-2014 period. Among the more notable nonr
building projects to develop in South Korea in recent years is Cheongna City Tower, also known as Tower Infinity. Approved for construction in 2013, the building is planned to be the sixth largest tower in the world. Tower Infinity will contain a movie theater, a water park, a roller coaster, restaurants, and stores. Designed to be "invisible," the building will be completely covered in LED screens that strategically display images of the surrounding area. The tower's planned completion date has been reported as 2018, but it is unclear if construction has actually begun yet.

Portland cement is the most widely used cement produc
Korea, accounting for nearly four-fifths of total demand in 2
ever, portland cement has lost market share in recent years, p
to increased usage of blended cement. Manufacturers have i
valued blended cement due to the lower energy costs and rec
sions involved in its production. Other types of cement, inclu

SAMPLE TEXT

CHART VIII-1

WORLD CEMENT MARKET SHARE, 2014
($300 billion)



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Sample Profile & Table, & Study Coverage

TABLE VI-20

SOUTH KOREA: CEMENT DEMAND BY TYPE & MARKET
(million metric tons)

Item	2004	2009	2014	2019	2024
Cement Demand					
By Type:					
Blended					
Portland					
Other					
By Market:					
Residential Building					
Nonresidential Building					
Nonbuilding					
% South Korea					
Asia/Pacific Cement Demand					

Source: The Freedonia Group, Inc.

SAMPLE TABLE

COMPANY PROFILES

PPC Limited
148 Katherine Street
Center Grayston Drive
Sandton
Johannesburg
South Africa
27-11-386-90
http://www.p

Revenues: $
Employment

SAMPLE PROFILE

Key Products: general-purpose portland cement, fly ash cement, and blended cement

PPC, formerly Pretoria Portland Cement Company Limited, is a key producer of cement and construction materials in South Africa. It operates in 3 segments: Cement, Lime, and Aggregates and Readymix.

PPC is involved in the world cement industry through the Cement segment, operates as the PPC Cement business (South Africa). In FY 2014, PPC Cement reported revenues of $742 million, of which South Africa accounted for 70 percent and other regions represented 30 percent. Cement products made by the business include SURE-BUILD and OPC general-purpose Type I portland cement; UNICEM general-purpose Type II portland cement; BOTCEM fly ash cement; and SUREROAD blended cement, which is formulated specifically for road construction applications. Furthermore, the company manufactures cementitious mortars and other cement-based building materials. PPC Cement maintains cement facilities in South Africa, Botswana, Zimbabwe, and Rwanda. In FY 2014, these facilities had an aggregate capacity to produce eight million metric tons of cement annually.

460

STUDY COVERAGE

World Cement is a Freedonia industry study that gives historical data (2004, 2009, 2014) and forecasts (2019, 2024) for supply and demand, as well as demand by type and market, for 6 regions and 20 countries. Total demand is also provided for 20 separate countries. The study also considers market environment factors, assesses the industry structure, analyzes company market share and profiles 44 global players.

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World Asphalt (Bitumen)

This study analyzes the world asphalt (bitumen) industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (primary asphalt, asphalt paving, asphalt roofing), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3351............November 2015...............$6500

Fiber Cement

This study analyzes the US fiber cement industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by material (e.g., sand, portland cement, cellulosic materials), application (e.g., siding, backerboard, molding and trim), market (residential, nonresidential) and US region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3348............November 2015...............$5300

Outdoor Noise Barriers

Demand for outdoor noise barriers in the US is forecast to rise 3.7 percent annually to 9.5 million square feet in 2019, valued at $191 million. Concrete will remain the dominant material and will offer the best growth opportunities. Highways will remain by far the largest market, but will be outpaced by the building construction segment. This study analyzes the 7.9 million square foot US outdoor noise barrier industry, with forecasts for 2019 and 2024 by material, product, market and US region. The study also evaluates company market share and profiles industry players.

#3334........... September 2015..............$5200

Construction Outlook in China

Construction expenditures in China will rise 7.8 percent per annum through 2019. Nonresidential building will remain the largest and fastest growing segment, driven by growing consumer spending for manufactured goods and services. Residential building construction will benefit from migration from rural to urban areas. This study analyzes the 17.6 trillion yuan construction industry in China, with forecasts for 2019 and 2024 by market and geographic region. The study also evaluates company market share and profiles industry participants.

#3299..................July 2015....................$5300

World Fiber Cement

World demand for fiber cement products is forecast to rise 4.4 percent annually to 32.6 million metric tons in 2019. Molding and trim and siding will be the fastest growing applications, based on fiber cement's ability to look like wood but last longer. North America will be the fastest growing regional market. This study analyzes the 26.3 million metric ton world fiber cement industry, with demand forecasts for 2019 and 2024 by market and application in 6 world regions and 19 countries. The study also evaluates company market share and profiles industry players.

#3273................. May 2015....................$6300

About The Freedonia Group

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