World Cement & Concrete Additives

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

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MARKET ENVIRONMENT

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INDUSTRY STRUCTURE

Advances will be driven by continuing growth in construction activity across the globe, increasing additive usage rates in developing countries, and a broader shift to higher performing specialty additives.

World demand to rise 7.2% annually through 2019

Global demand for cement and concrete additives is forecast to grow 7.2 percent per year through 2019 to $24.0 billion. These increases reflect continuing growth in construction activity across the globe that will, in turn, drive global usage of cement. Increasing additive usage rates in developing countries, as well as a broader shift to higher performing specialty additives, will further support advances in additive demand. The types of additives being used will also be impacted by environmental concerns, with the choice between blended and portland cements impacting additive demand on a regional and country basis. China will remain the largest and one of the fastest growing markets, though its role in the industry as the primary driver of global demand growth will begin to shift as other developing countries experience faster growth.

World Cement & Concrete Additive Demand, 2019
($24 billion)

China to be fastest growing major market

Despite a more challenging economic environment, demand for cement and concrete additives in China will grow through 2019, driven by increasing urbanization and the resulting investment in public infrastructure projects such as highways and bridges, as well as by rising additive treatment rates. However, China's role as the leading driver of global cement and concrete additives demand growth will diminish, as the importance of markets in other developing countries such as India and Turkey continues to grow. By 2024, India is forecast to be the third largest market for cement and concrete additives, just ahead of Japan. Growth in demand in the other countries in the Asia/Pacific region and the Africa/Mideast region will also benefit from increasing urban populations. Construction activity is expected to remain strong or accelerate in developed regions, such as North America and Western Europe, driving demand for additives for concrete in buildings. In particular, growth in the United States, the second largest market for cement and concrete additives, will outpace nearly all other developed countries.

Additive use is influenced by type of cement mix

The product mix of cement used within a country, which is increasingly being dictated by environmental concerns, especially in developed countries, can also strongly influence additives demand. High or increasing use of blended cement favors the use of chemical and fiber additives that increase its competitiveness with portland cement in the high performance applications. To remain competitive with blended cements, portland cement producers are utilizing mineral additives to further enhance the strength and workability, among other properties, of portland cement.

World Cement & Concrete Additives

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Sample Text, Table & Chart

TABLE VII-12

POLAND: CEMENT & CONCRETE DEMAND BY TYPE & MARKET
(million dollars)

Item	2004	2009	2014	2019	2024
Cement Demand (mil metric tons)					
$ additives/metric ton cement					
Cement & Concrete Additive Demand					
By Type:					
Chemicals					
Minerals					
Fibers					
By Market:					
Building Construction					
Highways & Streets					
Other Markets					
% Poland					
E Europe Cement & Concrete Additives					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

ASIA/PACIFIC

India: Cement & Concrete Additive Demand

Demand for cement and concrete additives in India tota[l] million in 2014, with sales [...] the 10 since 2004. While the size[...]t also an appreciable additives m[...] intens additives on a per metric to[...]e to th the consumer market for ce[...]umer- cement is minimal, even by[...] the In which is among the world's [...]ment n

SAMPLE TEXT

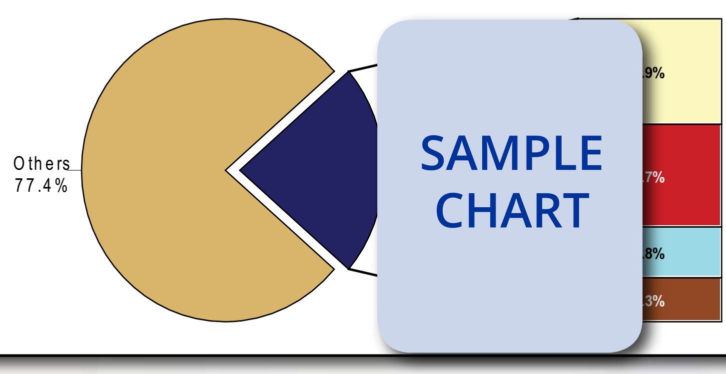
Despite that limitation, India has become one of the wor[ld's] significant markets for additives, particularly minerals and ch[...] Unlike most of the major world markets, in 2014 demand for mineral additives in India was greater than demand for chemical additives. A number of factors contribute to India's position as a significant market for mineral additives. It is the second largest coal consumer in the world, making disposal of waste coal ash a significant environmental concern. In the last decade or so, the Indian government has established a wide range of regulations and incentives promoting the beneficial use of fly ash, especially in cement and concrete. For example, state-owned electric utilities have been required to give fly ash produced from power plants free of cost to any company that will put it to use. As a result, the use of fly ash in cement and concrete increased rapidly, although most fly ash is used as a component in blended cements, which account for a large and growing share of the overall cement market, rather than as a concrete additive. Blast furnace slag is also widely used as a cement supplement in India, one of the world's top 10 iron producer[s] widely as a concrete additive. In recent years, however, the slag has suffered from competition with fly ash, due to cost [...]

Chemical additive usage in India is far less intensive th[an] developed areas, with usage rates for additives per metric to[n]

194 Copyright [...]

CHART VIII-1

WORLD CEMENT & CONCRETE ADDITIVE MARKET SHARE
($17.0 billion, 2014)



World Cement & Concrete Additives

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

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Sample Profile & Table, & Study Coverage

TABLE V-3

GERMANY: KEY INDICATORS FOR CEMENT & CONCRETE ADDITIVE DEMAND

Item	2004	2009	2014	2019	2024
Population (mil persons)					
$ GDP/capita					
Gross Domestic Product (bil 2013$)					
% construction					
Construction Expenditures (bil 2013$)					
Building:					
Residential					
Nonresidential					
Nonbuilding					
kg cement/capita					
kg cement/000$ GDP					
kg cement/000$ construction					
Cement Demand (mil metric tons)					

Source: The Freedonia Group, Inc.

SAMPLE TABLE

COMPANY PROFILES

Ash Resources Proprietary Limited
35 Westfield Road
Longmeadow Business Estate
Randburg 2125
South Africa
27-11-657-23
www.ashresou

Annual Sales:
Employment:

Key Products ... nd a reactive
cementitious f

SAMPLE PROFILE

Ash Resources is the leading producer and supplier of fly ash products in South Africa and one of the world leaders in the development of fly ash technology. The Company operates as a joint venture between Peotona Group Holdings Limited (South Africa) and the Lafarge South Africa Holdings Proprietary Limited subsidiary of Lafarge SA (France), which is itself owned by LafargeHolcim Limited (Switzerland).

The Company is involved in the world cement and concrete additives industry through the production and sale of DURAPOZZ fly ash, SUPERPOZZ aluminosilicate pozzolan, and POZZFILL cementitious filler. With a mean particle size of 25 microns, DURAPOZZ fly ash is a byproduct of power generation and is used as an extender or partial replacement of cement in concrete and mortar. This additive imbues concrete and mortar with increased strength, workability, pumpability, and finishing properties; reduced heat of hydration, permeability, bleeding, shrinkage, and alkali aggregate reactivity; and increased resistance to chloride- and sulfate-induced corrosion.

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STUDY COVERAGE

This Freedonia study, ***World Cement & Concrete Additives***, presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by type and market in six regions and 24 countries. The study also considers market environment factors, details the industry structure, evaluates company market share data and profiles 35 industry competitors worldwide.

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Related Studies

World Construction Aggregates

This study analyzes the world construction aggregate industry. It presents historical data (2004, 2009, and 2014) and forecasts (2019 and 2024) by type (e.g., crushed stone, sand, gravel), market (residential building construction, nonresidential building construction, nonbuilding construction), application (e.g., hydraulic concrete, road base and coverings, asphaltic concrete), world region, and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3389................ March 2016...................$6300

Fiber Cement

US demand for fiber cement products is forecast to grow 5.8 percent annually through 2019 to 2.9 billion square feet, valued at $2.2 billion. Siding will remain the dominant application, while backerboard grows the fastest. Growth in the dominant residential market will continue to outpace the nonresidential segment. This study analyzes the 2.2 billion square foot US fiber cement industry, with forecasts for 2019 and 2024 by material, application, market, and US region. The study also evaluates company market share and profiles industry players.

#3348............ December 2015................$5300

World Asphalt (Bitumen)

Through 2019, global demand for asphalt is projected to expand 2.8 percent per year to 122.5 million metric tons. The Asia/Pacific region has overtaken North America as the largest regional market, and will continue to record the fastest advances. Asphalt roofing products will outpace the dominant paving products segment. This study analyzes the 107 million metric ton world asphalt (bitumen) industry, with forecasts for 2019 and 2024 by product for six world regions and 18 major countries. The study also evaluates company market share and profiles industry players.

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

World Cement

World demand for cement will rise 4.5 percent yearly to 5.2 billion metric tons in 2019. India will be the fastest growing major market, as the pace of growth in China slows considerably. Blended cement will remain the most popular type, and will gain market share. This study analyzes the 4.2 billion metric ton world cement industry, with forecasts for 2019 and 2024 by type and market for six world regions and 20 major countries, along with total supply and demand for an additional 23 countries. The study also evaluates company market share and profiles industry players.

#3303................August 2015...................$6500

Asphalt

US demand for asphalt will increase 3.3 percent annually to 26.8 million tons in 2019. Roofing and other building construction products will outpace the dominant paving sector. Asphalt emulsions will pace gains among paving products. Residential buildings will be the fastest growing market, while nonbuilding uses remain the largest segment. This study analyzes the 22.8 million ton US asphalt industry, with forecasts for 2019 and 2024 by use, product, market and US region. The study also evaluates company market share and profiles industry players.

#3304..................July 2015.....................$5500

About The Freedonia Group

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