Demand gains for crushed stone and alternative aggregates -- such as recycled concrete, fly ash, and slag -- will be stimulated by healthy gains in all types of construction through much of the world. Residential building applications for aggregates will be fueled by upturns in the housing markets of developed countries and by rising personal incomes in developing countries, which will spur demand for more modern housing.

Illegal mining activities restricting growth in developing markets

Sand and gravel reserves are shrinking across much of the world, and illegal sand mining plagues a number of developing markets that have rapidly growing sand consumption requirements. As efforts to curb illegal mining activities have been largely unsuccessful, sand and gravel reserves in many countries are expected to be depleted at a rapid pace through 2019. This will result in price hikes, especially in urban centers where demand for aggregates is sizable, and will lead construction firms to turn to more favorably priced items. Alternative aggregates, in particular, are typically price-competitive with virgin aggregates since they are construction and industrial waste products that would otherwise be sent to a landfill.

China to remain largest consumer, will represent nearly half of global sales

Gains will be fastest in the Asia/Pacific region, with India, Indonesia, Vietnam, and Malaysia recording the most rapid increases. Although growth in the Chinese market will slow going forward, China will remain by far the largest national consumer of aggregates in 2019. The Africa/Mideast region will also record rapid growth, with all major national markets recording gains above the world average. In Central and South America, a number of government-backed affordable housing programs will help resuscitate the region's residential construction industry and support aggregates market gains.

Hydraulic concrete applications to expand most rapidly

Hydraulic concrete will remain the largest application for construction aggregates through 2019. Sales in concrete applications will expand at an above average pace as well, fueled by gains in cement demand in all sectors of the construction industry. While growth will not be as sizable or rapid, demand in asphalt applications will represent an improved performance over the 2009-2014 period. This application will be bolstered primarily by an improved construction market in North America and Western Europe, where asphalt paving is most intensively used.

Study coverage

This study analyzes the world construction aggregates industry. It presents historical data (2004, 2009 and 2014) and forecasts (2019 and 2024) for markets demand (e.g., residential, nonresidential, nonbuilding), plus demand by product (e.g., crushed stone, sand gravel, other) and by application (e.g., hydraulic concrete, asphaltic concrete, road base and coverings, other), in 6 regions and 37 major countries. The study also considers market environment factors, assesses industry structure, evaluates company market share and profiles global industry competitors.

Copyright 2016 The Freedonia Group
CONTENTS SUMMARY

Executive Summary

Market Environment

Overview

World Construction Aggregates Market
Demand by Region
Residential Building Construction
Nonresidential Building Construction
Nonbuilding Construction
Demand by Product
Crushed Stone
Sand
Gravel
Other
Demand by Application
Hydraulic Concrete
Road Base & Coverings
Asphaltic Concrete
Other

Other Regions

Central & South America
Brazil
Other Central & South America
Argentina
Colombia
All Other

Eastern Europe
Russia
Poland
Other Eastern Europe
Romania
Ukraine
All Other

Africa/Mideast
Turkey
Iran
Saudi Arabia
Egypt
Other Africa/Mideast
Nigeria
South Africa
All Other

North America

Construction Aggregates Markets
Products & Applications
United States
Canada
Mexico

Western Europe

Construction Aggregates Markets
Products & Applications
Germany
France
Italy
United Kingdom
Spain
Other Western Europe
Netherlands
Switzerland
Austria
Sweden
Belgium
All Other

Asia/Pacific

Construction Aggregates Markets
Products & Applications
China
India
Japan
Indonesia
South Korea
Vietnam
Thailand

Industry Structure

Industry Composition
Market Share
Mergers, Acquisitions, & Divestitures
Manufacturing & Product Development
Marketing
Distribution
Cooperative Agreements
Cooperative Agreements

Company Profiles

TABLES & CHARTS

Executive Summary

Summary Table

Market Environment

Overview

1 World Construction Aggregates Demand by Region

Cht World Construction Aggregates
Demand by Region

3 World Residential Building
Construction Aggregates Demand by Region

4 World Nonresidential Building
Construction Aggregates Demand by Region

5 World Nonbuilding Construction
Aggregates Demand by Region

6 World Construction Aggregates
Demand by Product

Cht World Construction Aggregates
Demand by Product, 2004-2024

7 World Crushed Stone
Demand by Region

8 World Sand Demand by Region

9 World Gravel Demand by Region

10 World Demand for Other Construction
Aggregates by Region

11 World Construction Aggregates
Demand by Application

Cht World Construction Aggregates
Demand by Application, 2014

12 World Hydraulic Concrete
Demand by Region

13 World Road Base & Coverings
Demand by Region

14 World Asphaltic Concrete
Demand by Region

15 World Demand for Construction
Aggregates Used in Other
Applications by Region

Tables for each region/country offer historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) for:

Construction Aggregates Markets
Construction Aggregates Demand by Product & Application
Regional: Construction Aggregates Demand by Country, 2014 (chart)
... plus macroeconomic Indicators

Industry Structure

1 Construction Aggregates Sales
by Company, 2014

Cht Construction Aggregates
Market Share

2 Selected Acquisitions & Divestitures

3 Selected Cooperative Agreements
Russia: Products & Applications -- Crushed stone is the most widely used product type in Russia, representing 45% of demand in 2014. The nation also possesses sizable sand reserves, giving it a substantial share of the market for sand and alternative aggregates, however, make lower natural reserves available. The material could be used in construction techniques that could utilize construction waste and industrial byproducts. Through 2019, however, alternative aggregates will represent the fastest growing product category in Russia. As demolition waste and coal combustion products are widely available, they can be purchased at prices that are more than competitive with natural aggregates, fueling sales. Crushed stone will also post solid market increases.

On the other hand, diminishing sand reserves and reduction in illegal mining activity will result in subpar demand increases for this material. For example, in February 2016 police near Moscow charged a group with mining sand without a permit. The alleged offenders mined over five million cubic meters, with a value of $26 million. Government crackdowns on illegal mining will make sand more difficult to obtain for construction firms, causing price hikes and leading them to search for alternatives.

The hydraulic concrete segment was the fastest expanding aggregates market from 2009 to 2014, and it will continue to record the rapid gains of any major application through 2019, supported by relatively solid growth in the building construction sector. Sales increases for other aggregates applications will continue to register steady gains bolstered by the continued need for snow control in Russia. Demand growth related to road base and coverings and asphaltic concrete will be subpar, however, as the country’s road network will remain under-maintained in the near term.
Related Studies

World Cement & Concrete Additives
Global demand for cement and concrete additives will rise 7.2 percent annually through 2019 to $24 billion. The Asia/Pacific region will remain the largest market, while the Africa/Mideast region and Central and South America will grow the fastest. Chemicals will remain the largest segment and will lead gains. This study analyzes the $17 billion world cement and concrete additive industry, with forecasts for 2019 and 2024 by type and market for six world regions and 21 major countries. The study also evaluates company market share and profiles industry players.

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.

World Solid Surface & Other Cast Polymers
Global demand for cast polymers will rise 6.6 percent yearly to 246 million square meters in 2019, with a value of $23.1 billion. The Asia/Pacific region will remain the largest and fastest-growing market. Solid surface will remain the dominant type while engineered quartz, marble and other stone will grow the fastest. This study analyzes the 179 million square meter world cast polymer industry, with forecasts for 2019 and 2024 by type and application for six world regions and 18 major countries. The study also evaluates company market share and profiles industry players.

Freedonia’s methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

About The Freedonia Group

The Freedonia Group is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

- Automotive & Transport
- Chemicals
- Construction & Building Products
- Consumer Goods
- Energy & Petroleum
- Industrial Components
- Healthcare & Life Sciences
- Machinery & Equipment
- Metals, Minerals & Glass
- Packaging
- Plastics & Other Polymers
- Security
- Services
- Textiles & Nonwovens
- Water Treatment

The Freedonia Group is a division of MarketResearch.com

About MarketResearch.com

With offices in London, New York City, and Washington D.C., MarketResearch.com is the leading provider of global market intelligence products and services. With research reports from more than 720 top consulting and advisory firms, MarketResearch.com offers instant online access to the world's most extensive database of expert insights on industries, companies, products, and trends.