

World Construction Aggregates

Industry Study with Forecasts for 2019 & 2024

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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 thru 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.

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 - Sand
 - Gravel
 - Other
 - Demand by Application
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 - Asphaltic Concrete
 - Other

North America

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- 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

- Other Asia/Pacific
 - Australia
 - Pakistan
 - Philippines
 - Malaysia
 - All 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

Industry Structure

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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
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... plus macroeconomic Indicators

Industry Structure

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OTHER REGIONS

Russia: Products & Applications -- Crushed stone is the most widely used product type in 2014. The nation also has a substantial share of aggregates, however, make lower natural reserves and that could utilize construction products. 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, for 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 the 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 the 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 increase for other aggregates applications will continue to register steady growth 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.

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TABLE V-9

United Kingdom: Construction Aggregates Markets (million metric tons)

Item	2004	2009	2014	2019	2024
Population (millions)					
per capita GDP					
Gross Domestic Product (bil 2013\$)					
% construction					
Construction Expenditures (bil 2013\$)					
Residential					
Nonresidential					
Nonbuilding					
m tons aggregates/capita					
m tons aggregates/mil \$ GDP					
m tons aggregates/000\$ construction					
Aggregates Demand					
Residential Construction					
Nonresidential Construction					
Nonbuilding Construction					
% United Kingdom					
Western Europe Aggregates					

Source: The Freedonia Group

TABLE VI-4

China: Construction Aggregates Demand by Product & Application (million metric tons)

Item	2004	2009	2014	2019	2024
Construction Expenditures (bil 2013\$)					
m tons aggregates/000\$ construction					
Construction Aggregates Demand					
By Product:					
Crushed Stone					
Sand					
Gravel					
Other					
By Application:					
Hydraulic Concrete					
Road Base & Coverings					
Asphaltic Concrete					
Other					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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.

#3358.....January 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 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.

#3335.....October 2015.....\$6400

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

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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

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