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A new Market Report on the Cement and Concrete Industries.....

THE CEMENT INDUSTRY IN EUROPE AND THE MIDDLE EAST: A MARKET / TECHNOLOGY REPORT

By Alison Russell

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The report provides information on:

- Production, consumption, imports/exports of cement for all European Union (EU) countries, plus key non-EU European countries, with forecasts to 2012
- Production, consumption, imports/exports of cement for Turkey and also for Russia
- Production, consumption, imports/exports of cement for Middle East countries
- Production, consumption, imports/exports of cement for China
- Production, consumption, imports/exports data for concrete in Europe and the Middle East
- Construction industry trends and forecasts for both Europe and the Middle East
- Current markets and growth potential for additives and admixtures for cement and concrete
- Current markets and growth potential for cement replacements, such as fly ash and granulated blast furnace slag
- Examination of environmental issues affecting the cement industry
- Technology review of constituent materials and manufacturing processes used in the manufacture of cement
- Standards for cement and concrete
- Review of China's cement industry, its current position and future prospects
- Profiles of major multinational, European and Middle Eastern manufacturers and suppliers of cement, concrete, additives, admixtures and related materials – their financial results, plant capacities, plus details about their subsidiaries and recent acquisitions. Full contact details given
- Relevant cement and concrete associations, with full contact details
- Over 300 A4 pages and over 250 tables

AVAILABLE NOW – *The Cement Industry in Europe and the Middle East: A Market/Technology Report* is an in-depth study of the current position and future prospects (to 2012) for the cement industry in both regions, providing comprehensive data on production, consumption, imports & exports, and growth rates for the cement industry and its end user markets. The report also details the activities of key multinational, regional and domestic cement, concrete and additives/admixture producers.

Key market forces that are driving the cement industry and determining its future in Europe and the Middle East are analysed. The cement industry is closely allied to the concrete industry, as so in examining the consumption of cement, the report also covers the supply and demand, and prospects, for the ready mixed and precast concrete sectors, as well as looking at trends within the construction market generally.

Global cement production in 2007 was an estimated 2690 million tonnes, up from 2540 million tonnes in 2006, and by 2012 it is forecast to reach 3370 million tonnes. Another 648 million tonnes of production capacity is already scheduled to come on line by 2010, to meet the anticipated growth in demand. Much of this additional capacity is designated for China, but a significant proportion, 15%, will be installed in the Middle East.

In the European Union (EU27 countries), total cement production in 2007 is estimated at 283 million tonnes, representing 10.5% of world production. Cement production in the EU is dominated by Spain, at over 19% of the EU total, followed by Italy and Germany.

Cement consumption in Europe, including Turkey, is estimated at just over 310 million tonnes in 2007, which represents an increase of 2.75% over 2006, and this is forecast to rise strongly to 2012, as outlined in the report. Growth in consumption of cement in Eastern European countries, such as Poland and Romania, has been particularly strong, due to large infrastructure and housing programmes. Consumption of cement in Russia is also growing rapidly for the same reasons.

The current construction boom in the Middle East is on an unprecedented scale. Cement consumption in the Arab Union countries was an estimated 144 million tonnes in 2007, which is predicted to rise to 180 million tonnes by 2010. Egypt is the largest cement producer in the Middle East region, with production of 37.1 million tonnes in 2006, followed by Iran with a production level of 35.8 million tonnes.

The cement industry has undergone tremendous changes in its structure over the last decade, with significant consolidation and vertical integration. The global leaders in the industry include Lafarge (France), Holcim (Switzerland), Cemex (Mexico), HeidelbergCement (Germany) and Italcementi (Italy). In the drive towards vertical integration, a number of large cement manufacturers have acquired construction companies that produce ready mixed concrete: one such example is the purchase in 2007 of the UK based construction company Hanson by the German cement producer HeidelbergCement. Many multinational cement producers are also capitalising on the strong growth in Asian markets (such as in China and India) and Middle Eastern markets, often through joint ventures with local cement producers.

While continuing to expand, the cement industry has also been proactive in meeting environmental challenges, through investment in energy-saving technologies, alternative fuels and recycled raw materials. The use of waste products as fuel in European cement plants is already saving the equivalent of 3 million tonnes of coal per year. The use of blended cements, incorporating recycled products such as pulverised fuel ash or granulated blast furnace slag, is also growing steadily.

Admixtures and additives play an important role in the cement and concrete industries and include products such as plasticisers, superplasticisers, retarders and accelerators. Today, the additives and admixtures market stands at an estimated 980,000 tonnes in terms of consumption within the EU, with a value of over €1000 million.

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2 SCOPE

The main objective of this report is to assess the markets for cement in European countries and also in the Middle East. Quantitative data covering production, consumption and import and export trends for the cement industry, the ready mixed concrete and also for the construction sector generally, are presented for each major EU and Middle Eastern country. Additionally, predictions are given for the potential future production and consumption of cement, based on likely growth patterns, to either 2010 or 2012.

Chapter 3 discusses technical aspects of the raw materials and manufacturing processes used in the production of the various types of cement, from ordinary Portland cement, through to blended cements and special cements, such as calcium aluminate and refractory cements. Similarly, the different types of concrete – ready mixed and reinforced, and more specialised sorts such as lightweight, heavyweight, self-compacting concrete and pre-cast concrete – are also discussed and their properties outlined. Chapter 3 also covers the technical aspects of concrete admixtures (e.g. superplasticisers and retarders), concrete additives (e.g. pigments and fibres) and cement replacements (e.g. granulated blast furnace slag and pulverised fly ash).

The way in which the various materials are used in different European countries, and even the definitions of their properties, have been a source of confusion in the past. However, the situation is becoming clearer with the advent of new standards. A description of the new European (EU) standards for cement materials, admixtures and test procedures is given. Where appropriate, descriptions of new products and procedures, and on-going research and development (R&D), are presented in Chapter 3.

Chapter 4 examines economic aspects of the cement and concrete industries, and also the current and future prospects for the sector. It covers production and consumption, and trends in the cement industry by geographical area and by country. This includes details concerning the producers in each country, and any recent developments regarding their manufacturing facilities.

Chapter 4 covers all European Union (EU) countries (as well as those European countries outside of the EU) and Turkey to give a full picture of European supply and demand for cement in the region. It also summarises trends and markets in the Middle East region, including Iran, the Gulf Coast countries, and Egypt, amongst others. Chapter 4 also includes a look at developments in China, including current production and consumption patterns, as well as recent acquisitions made into the Chinese cement industry. In addition to cement and concrete, this chapter also examines the markets for and supply of additives, admixtures and cement replacements, including import and export figures for European countries.

The import and export trade figures given in the report are the most up to date available at the time of publication, and mostly refer to 2006. Weights referred to are metric tonnes; values are given in either Euros or US Dollars; quantities of ready mixed concrete are expressed as cubic metres (m³).

Chapter 5 reviews current environmental concerns and legislation, with particular reference to the cement industry in Europe and China. It covers the different aspects of cement production that impact on the environment and the measures adopted by the cement producers to overcome them and to reduce their environmental footprint, particularly the reduction of greenhouse gas emissions and the recycling of waste products.

The activities and sales of major companies involved in the cement and concrete industries are outlined in Chapter 6, including the major cement, ready mixed concrete, admixtures, additive and cement replacement suppliers. Product names are given in italics. The company profiles also give contact details for each company, including address, telephone, fax, and internet addresses.

Chapter 7 provides a summary of the report's findings.

Finally, lists of industry associations (including telephone, fax, e-mail and Internet address) are supplied in Chapter 8.