



America's Cement Manufacturers™

**SAMPLE**

**SURVEY OF PORTLAND CEMENT  
CONSUMPTION BY USER GROUP**

FIRST QUARTER 20xx

**Market Intelligence Group**

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# Table of Contents

- Survey Overview** ..... 4
- Survey Response Rate** ..... 5
- Portland Cement Consumption**..... 6
  - Data..... 7
  - Analysis ..... 8-9
  - Forecast ..... 10
- User Groups** ..... 12
  - Ready-Mixed Concrete ..... 14-15
  - Precast Concrete ..... 16-17
  - Concrete Brick & Block Manufacturers ..... 18-19
  - Streets & Highways Contractors ..... 20-21
  - Packaged Product Producers ..... 22-23
  - Prestressed Concrete ..... 24-25
  - SC/RCC/FDR Paving ..... 26-27
  - Building Materials Dealers ..... 28-29
  - Oil & Gas Well Drilling ..... 30-31
  - Concrete Pipe..... 32-33
  - Fiber Cement Siding Manufacturers ..... 34-35
  - Concrete Roof Tile..... 36-37
  - Interlocking Pavers ..... 38-39
  - Waste Stabilization & Solidification ..... 40-41
  - SC/RCC for Water Resources ..... 42-43
  - All Other Manufacturers and Contractors..... 44



## Survey Overview

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The Portland Cement Association's (PCA's) Market Intelligence Group conducts a quarterly survey of portland cement consumption by user segment. The intent of this report is to help member companies, PCA staff, and promotional allies better evaluate market conditions surrounding the use of concrete and other cement based products.

**Data for eighteen user segments is collected:**

- **Building Materials Dealers**
- **Concrete Brick & Block Manufacturers**
- **Fiber-Cement Siding**
- **Concrete Pipe**
- **Concrete Roof Tile**
- **Interlocking Pavers**
- **Oil & Gas Well Drilling**
- **Packaged Product Producers**
- **Precast Concrete**
- **Prestressed Concrete**
- **Ready-Mixed Concrete**
- **Full- Depth Reclamation (FDR) Paving**
- **Soil-Cement (SC) Paving**
- **Roller Compacted Concrete (RCC) Paving**
- **Soil-Cement/ Roller Compacted Concrete (SC/RCC)-Water Resources**
- **Streets & Highways Contractors**
- **Waste Solidification & Stabilization (S/S)**
- **All Other Manufacturers and Contractors**

Survey forms are sent to all PCA member cement companies in the United States. Totals exclude masonry and white cement. Cement tonnage is reported in metric tons.

Survey results are adjusted to correspond to U.S.G.S. (U.S.) cement consumption volumes as reported by cement companies in their respective monthly surveys to those agencies. Although this survey excludes white cement, white cement consumption cannot be excluded from the U.S.G.S. survey and may account for up to 1.5% of quarterly volume.

**NOTE: *Survey of Portland Cement by User Group* has historically covered data for the both the U.S. and Canada. Beginning in Q3 2013, total consumption and figures for individual segments reflect U.S. volumes only.**

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## Survey Response Rate

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The following companies/plants reported for the First Quarter of 20xx:

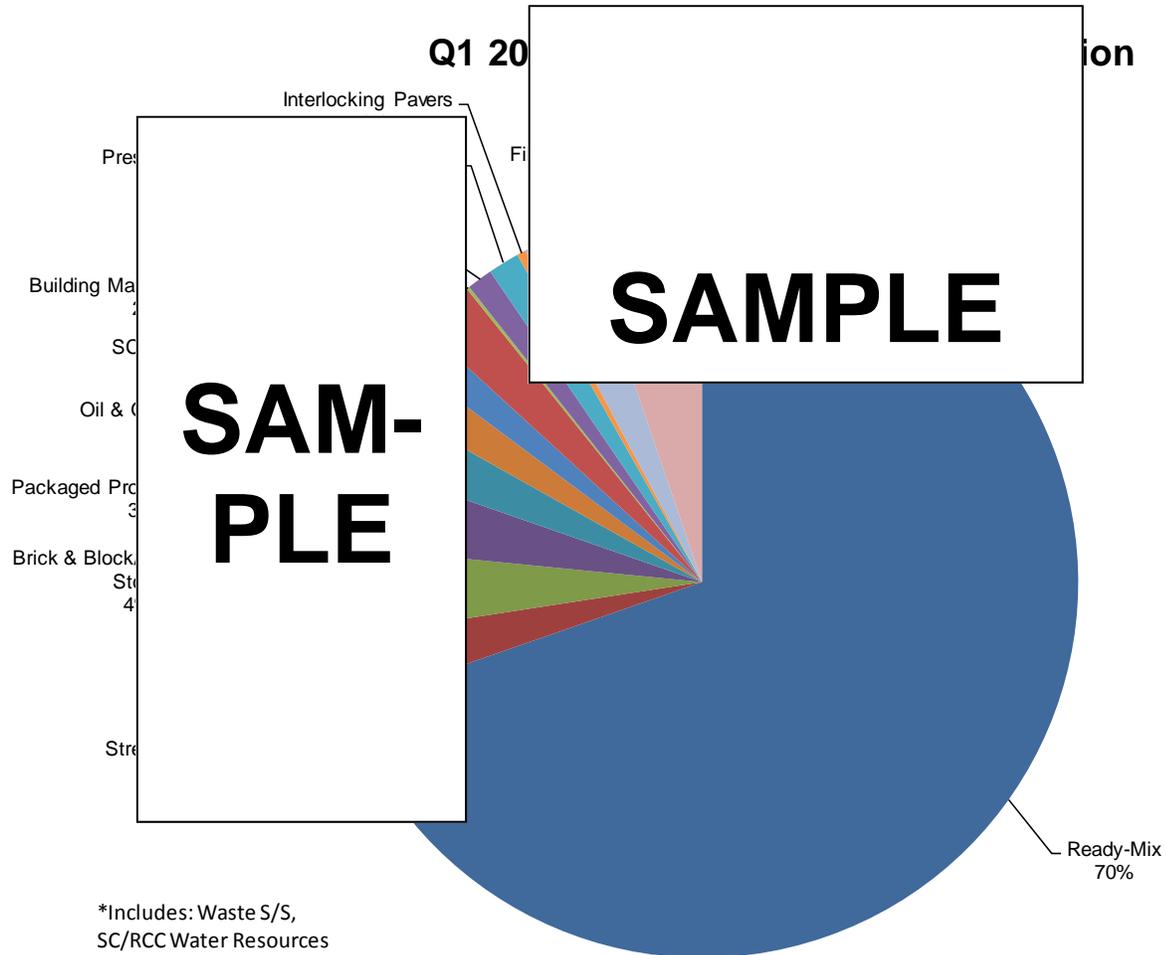
*American Cement Company*  
*Argos USA Corporation*  
*Ash Grove Cement Company*  
*Buzzi Unicem USA*  
*CalPortland*  
*CEMEX*  
*Continental Cement*  
*Drake Cement LLC*  
*GCC of America Inc.*  
*LafargeHolcim*  
*Lehigh Cement Company*  
*Martin Marietta Materials, Inc.*  
*Mitsubishi Cement Corporation*  
*The Monarch Cement Company*  
*National Cement Company of Alabama*  
*National Cement Company of California*  
*Phoenix Cement Company*  
*St. Mary's Cement Inc. (U.S.)/VCNA*  
*Suwannee American Cement/ VCNA*  
*Texas Lehigh Cement Co, LP*  
*Titan America LLC*

**Industry Response Rate: 87%**

## Portland Cement Consumption

### First Quarter 20xx

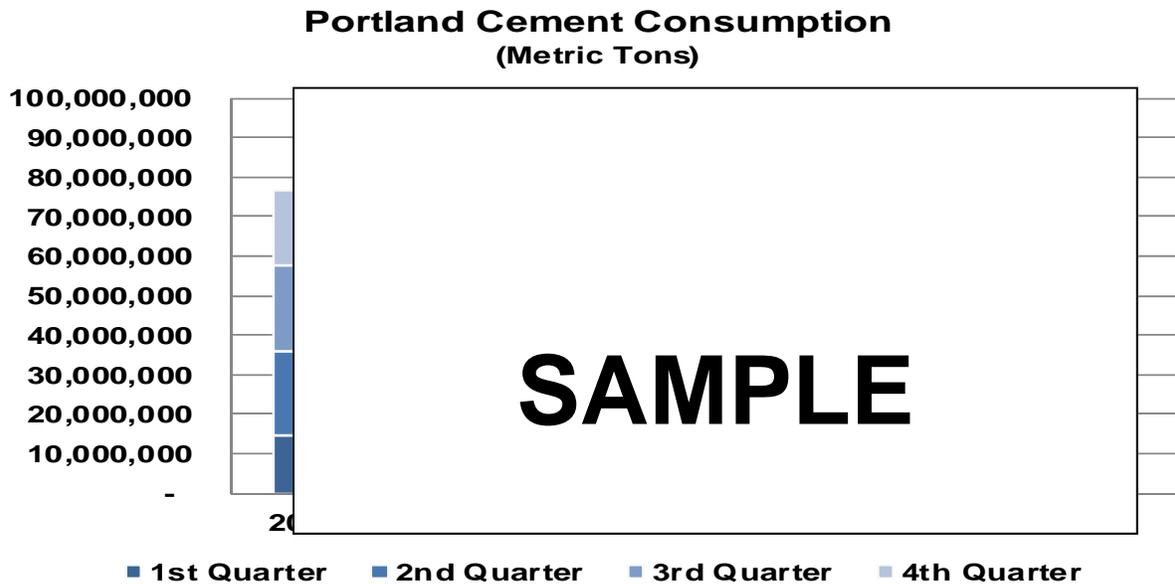
Cement consumption in the first quarter of 20xx was up xxx,086 metric tons (mt), up 1.0% from the first quarter of 20xx. In first quarter 20xx, Ready-Mixed Concrete captured xx.x% of total consumption, followed by All Other (x.x%), Precast (x.x%), Brick & Block/Manufactured Stone (x.x%), and the Streets & Highways Contractors (x.x%) segment.



*NOTE: Portland cement consumed by the ready-mixed market and used in street and highway construction may be reported under Ready-Mixed Concrete and not under Streets & Highways Contractors.*

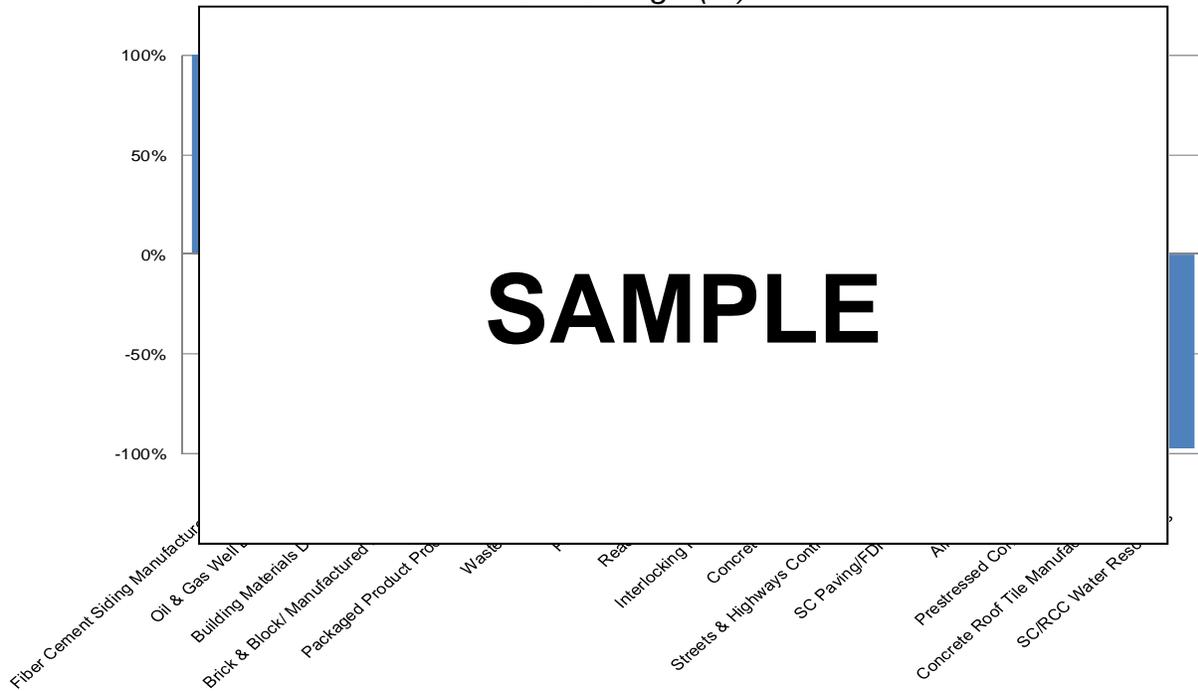
**Portland Cement Consumption, First Quarter 20xx: Data**

U.S. Shipments	1st Quarter
(Metric Tons)	<b>SAMPLE</b>
Ready-Mix	
Streets & Highways Construction	
Precast	
Brick & Block/ Manufacture	
Packaged Product Production	
Oil & Gas Well Drilling	
SC Paving/FDR/RCC	
Building Materials Dealers	
Concrete Roof Tile Manufacture	
Prestressed Concrete*	
Concrete Pipe	
Interlocking Pavers	
Fiber Cement Siding Manufacture	
Waste S/S**	
SC/RCC Water Resources	
All Other	
Total	

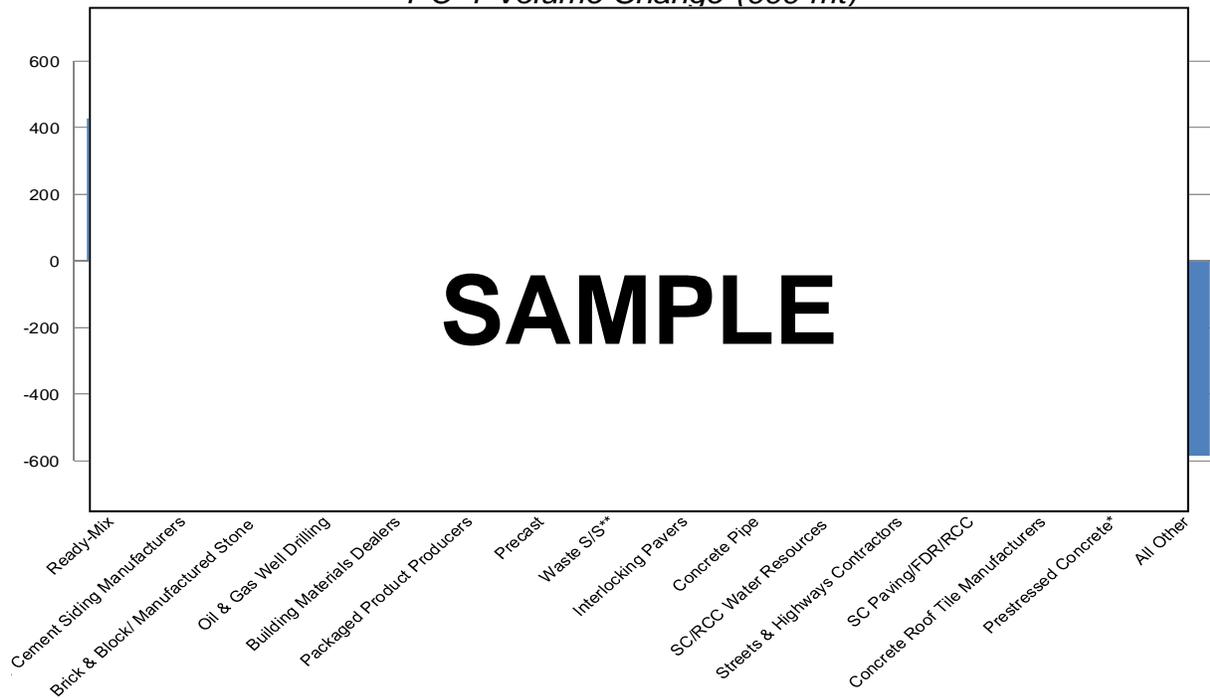


# Portland Cement Consumption, First Quarter 20xx: Analysis

**Market Dynamics: Leaders & Laggards**  
Y-O-Y Change (%)



**Market Dynamics: Leaders & Laggards**  
Y-O-Y Volume Change (000 mt)



Portland Cement Consumption, First Quarter 20xx: Analysis & Outlook

U.S. portland cement consumption grew x% in the first quarter of 20xx against the same period in 20xx. The recovery is being hindered by the recession and remains

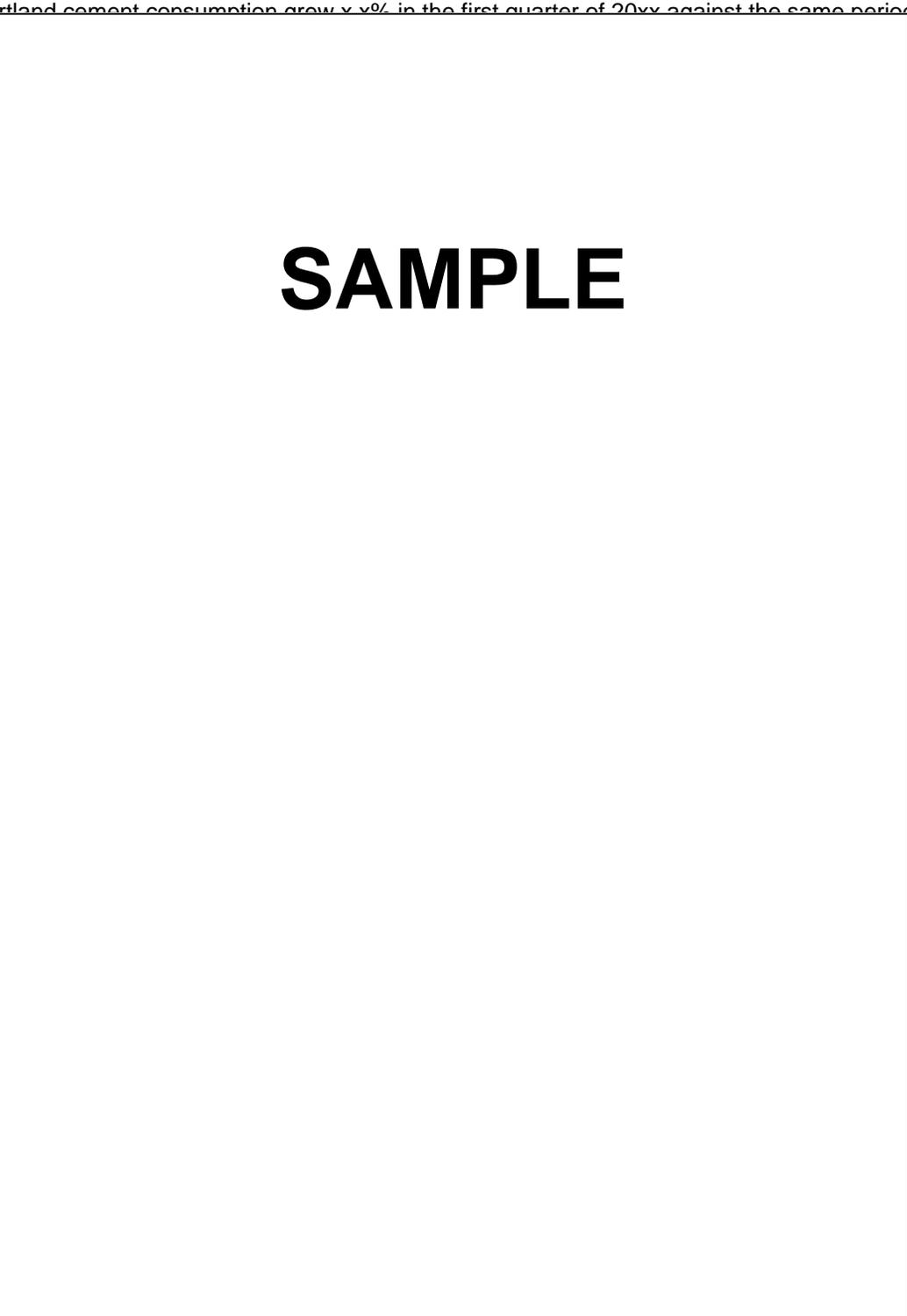
PCA believes that the unemployment rates remain high and optimistic about the economy has been eroded. It will play a major role in the recovery led by China.

The recovery in growth is expected to be both energy and federal spending. Expectations for continued residential

Tax reform will have a positive impact on GDP growth. Cement consumption

Public construction. While the campaign trail is still in progress since the segment is still in a pessimistic health due to the health care spending on construction to await the consumption

Oil prices are still high, but oil well production is still high. EIA's projections are still high by more



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# Portland Cement Consumption: Forecast

Cement Consumption (000 mt)	Actual	% Change Y/Y	PCA Projection		% Change Y/Y	% Change Y/Y
	2016	2016	2017	2018	2017	2018
United States						%
Ready-Mix						%
Streets & Highway						%
Precast						%
Brick & Block/ Ma						%
Packaged Produc						%
SC/RCC/FDR Pavi						%
Building Materials						%
Prestressed Concr						%
Oil & Gas Well Dr						1%
Concrete Pipe						%
Concrete Roof Til						%
Fiber Cement Sid						%
Interlocking Pave						%
Waste S/S						%
SC/RCC Water Re						%
All Other						%
<b>Total</b>						<b>%</b>
User group fore-						
Ready-M						
Streets						
Brick &						
Precast						
Oil & Ga						
SC/RCC						
Building						
Packag						
Concre						
Prestre						
Interloc						
Fiber C						
Waste S						
Concrete Roof Til			8%	10%	10%	
<b>SC/RCC Water Resources</b>			0%	10%	90%	

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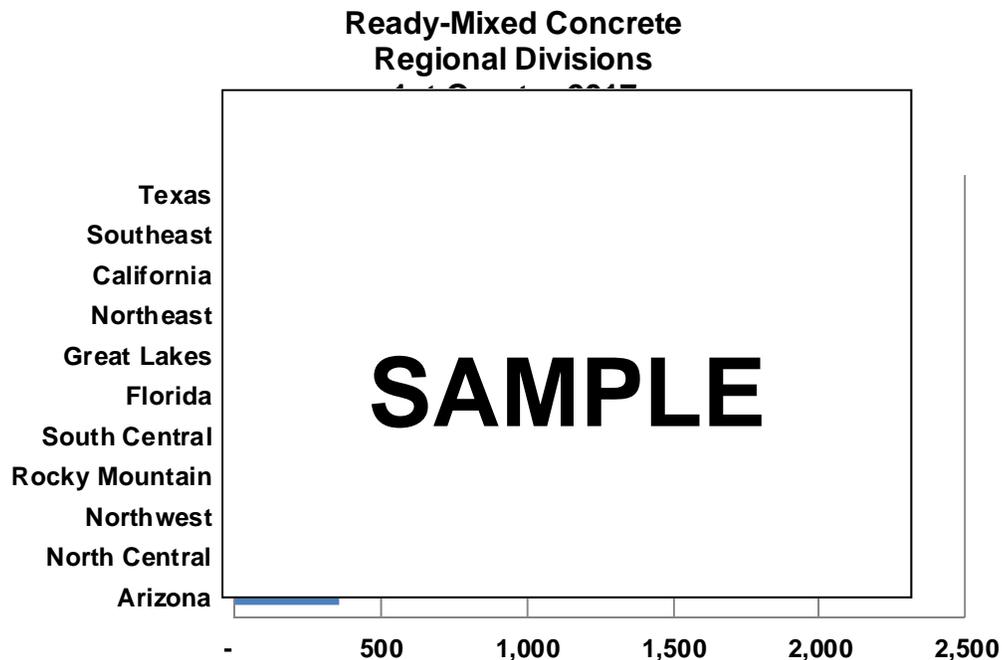
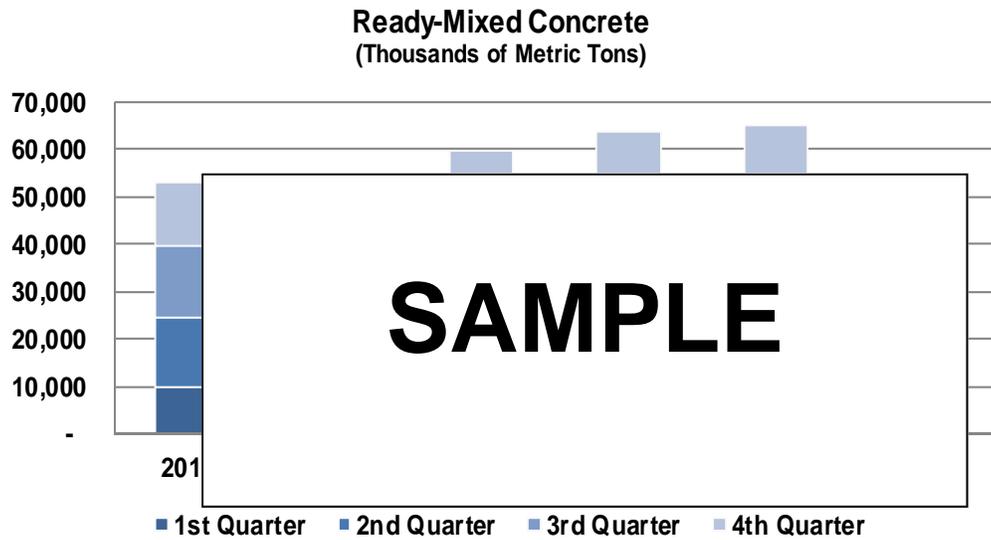


# USER GROUPS



## Ready-Mixed Concrete: Data

Ready-mixed concrete accounted for 69.7% of total U.S. cement consumption in the first quarter of 20xx. (13,043,121). This reflects a 3.4% increase from first quarter 20xx. The largest regional cement consumer for the ready-mixed segment was Texas with 2,254,318 mt, followed by the Southeast with 2,145,883 mt.



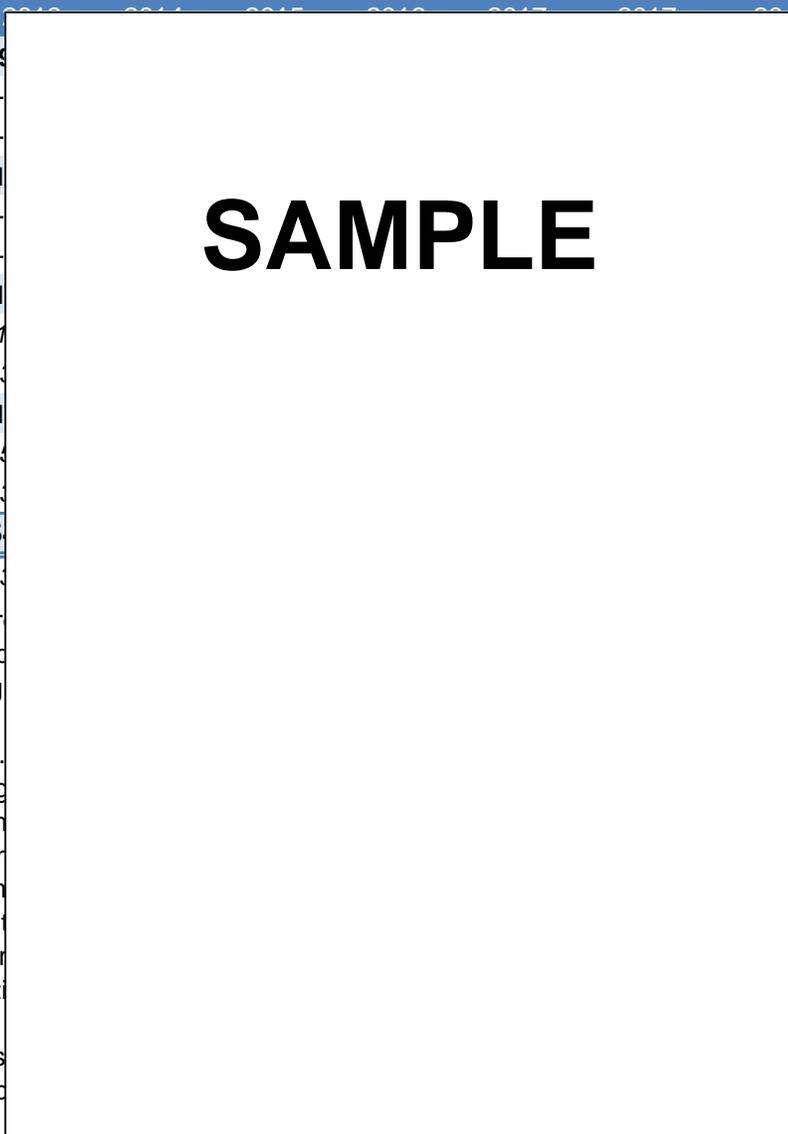
## Ready-Mixed Concrete: Analysis

Ready-mixed refers to concrete that is batched for delivery from a central plant instead of mixed on the job site. Ready-mixed concrete is shipped to every market segment in North America. As a result, the market drivers for ready mix users generally mirror total cement demand. The principal exception is large highway construction projects which tend to rely on Street & Highway contractors.

### Ready-Mixed Concrete (000 mt)

PCA Projection

Year	2016	2017	2018	2019	2020	2021	2022	2023	2024
<b>1st Quarter</b>									
% Change Y/Y									
% Change YTD									
<b>2nd Quarter</b>									
% Change Y/Y									
% Change YTD									
<b>3rd Quarter</b>									
% Change Y/Y									
% Change YTD									
<b>4th Quarter</b>									
% Change Y/Y									
% Change YTD									
<b>Total</b>									<b>24</b>
% Change Y/Y									%



Growth in ready-mixed concrete projects ready-mixed concrete to the expectation of negative g

Overall GDP growth in the U.S. healthy. Consumer spending attributed to the employment market terms of construction spending thus far, which is where the market construction has been down market investment and possible tax market certainly have a significant positive

PCA expects the ready-mix market line with PCA's national forecast

A pro- due to

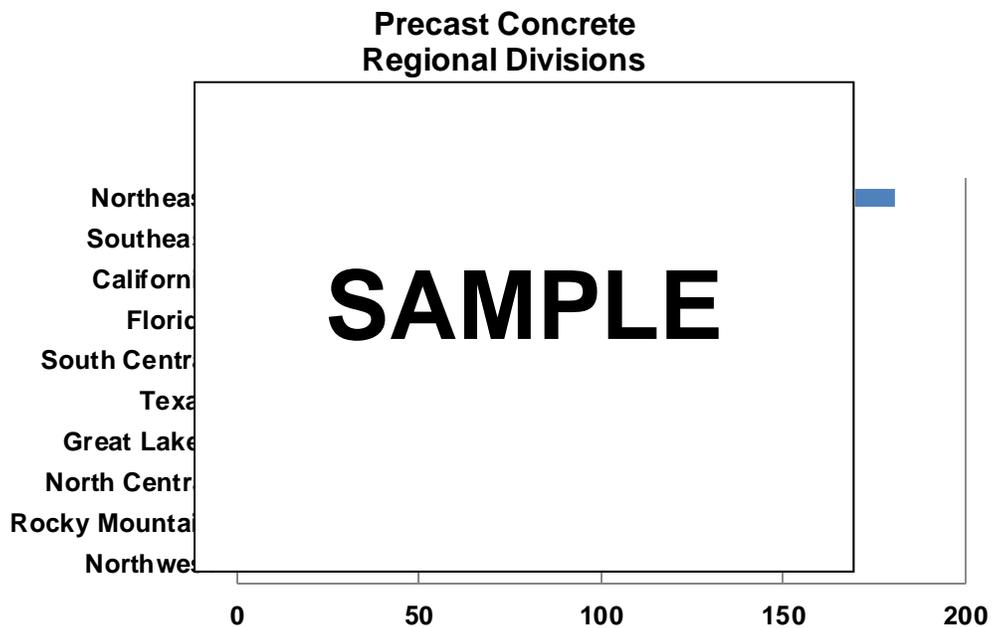
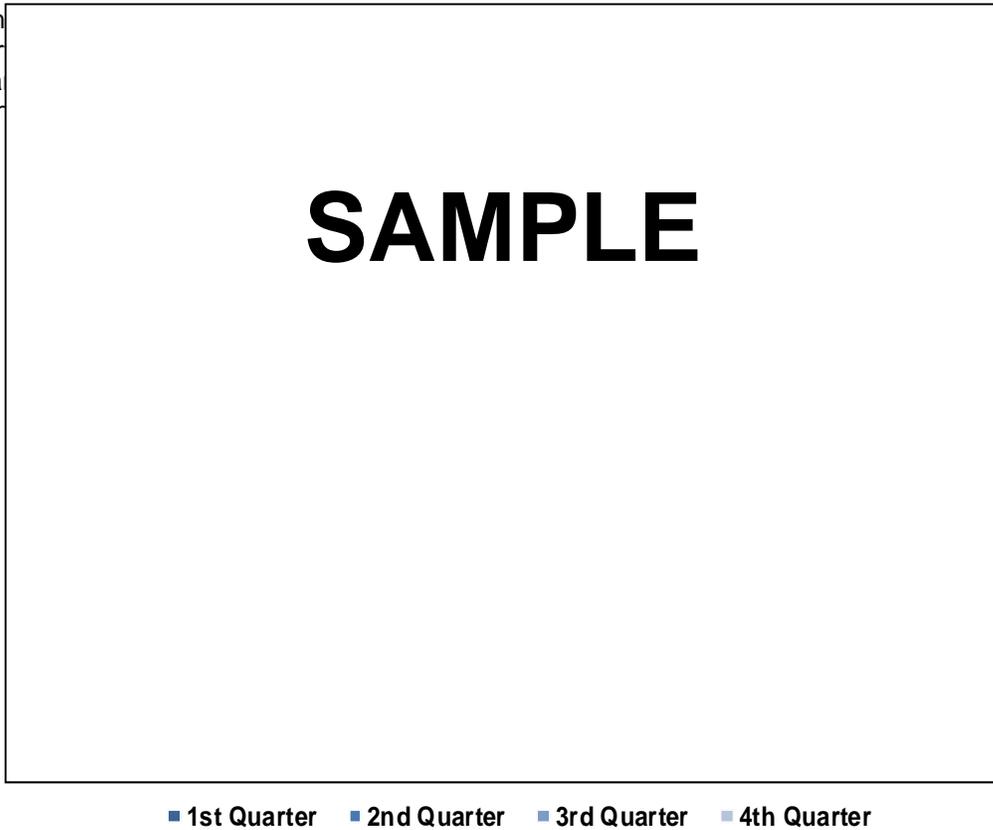
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## Precast Concrete: Data

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onal ce-  
\$1 mt.



## Precast Concrete: Analysis

Precast concrete is concrete defined strength prior to placement. Precast concrete is used for structural wall panels, catch basins, and other applications.

eci-  
rchi-

### Precast Concrete

Year
<b>1st Quarter</b>
% Change Y/Y
% Change YTD
<b>2nd Quarter</b>
% Change Y/Y
% Change YTD
<b>3rd Quarter</b>
% Change Y/Y
% Change YTD
<b>4th Quarter</b>
% Change Y/Y
% Change YTD
<b>Total</b>
% Change Y/Y

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With strong nonresidential construction spending in 20xx, the precast segment was able to bounce back and grow nearly 20%. PCA expects nonresidential construction to improve again in 2017 but at a slower pace.

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