



America's Cement Manufacturer

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## SURVEY OF PORTLAND CEMENT CONSUMPTION BY USER GROUP

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FIRST QUARTER 20xx

### Market Intelligence Group

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## 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:

*Alamo Cement Company*  
*Argos USA Corporation*  
*Ash Grove Cement Company*  
*Buzzi Unicem USA*  
*CalPortland*  
*CEMEX*  
*Continental Cement*  
*Drake Cement LLC*  
*GCC of America Inc.*  
*Giant Cement*  
*Lehigh Cement Company*  
*Martin Marietta Materials, Inc.*  
*Mitsubishi Cement Corporation*  
*The Monarch Cement Company*  
*National Cement Company of Alabama*  
*National Cement Company of California*  
*Salt River Materials Group/Phoenix Cement Company*  
*St. Mary's Cement Inc. (U.S.)/VCNA*  
*Titan America LLC*

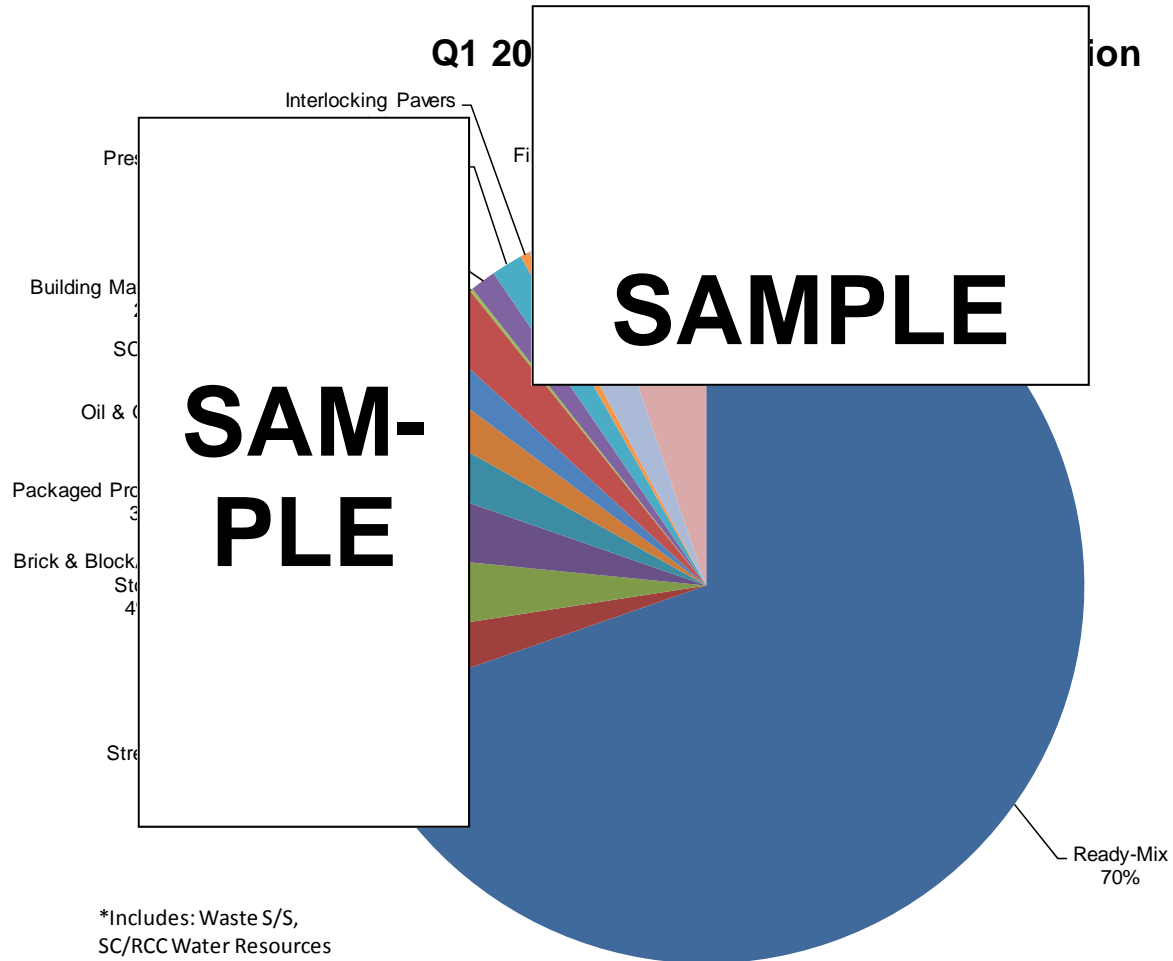
**Industry Response Rate: XX%**

**\*Due to non-members and non-respondents, PCA uses a footing methodology to adjust to U.S.G.S. totals.**

## Portland Cement Consumption

### First Quarter 20xx

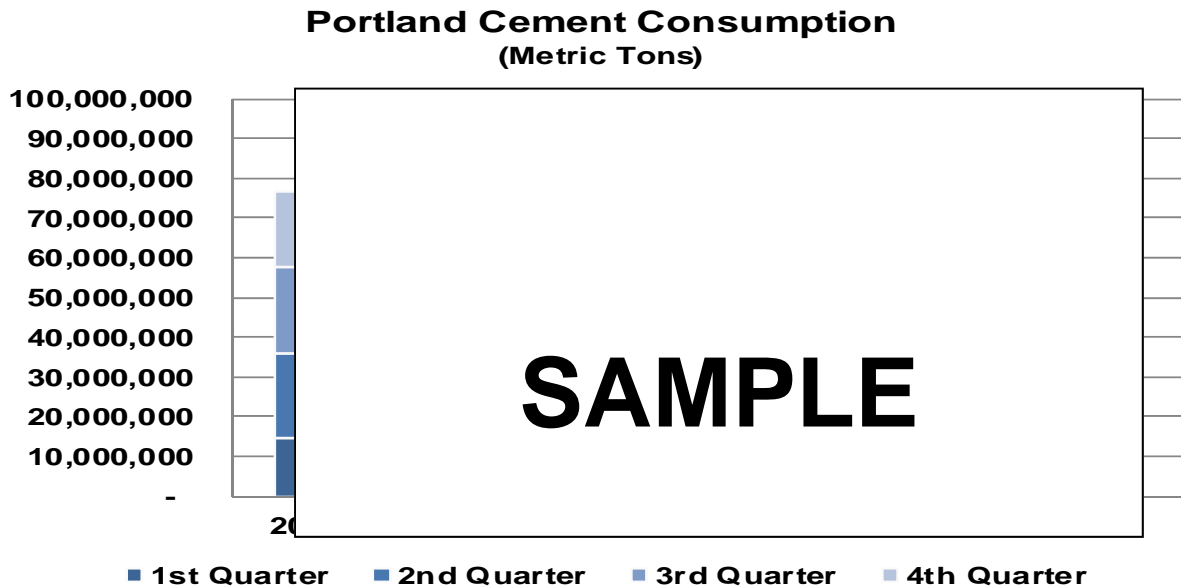
Cement consumption in the first quarter of 20xx was up xxx,086 metric tons (mt), up 1.0% from the first quarter of 20xx. In first quarter 20xx, Ready-Mixed Concrete captured xx.x% of total consumption, followed by All Other (x.x%), Precast (x.x%), Brick & Block/Manufactured Stone (x.x%), and the Streets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

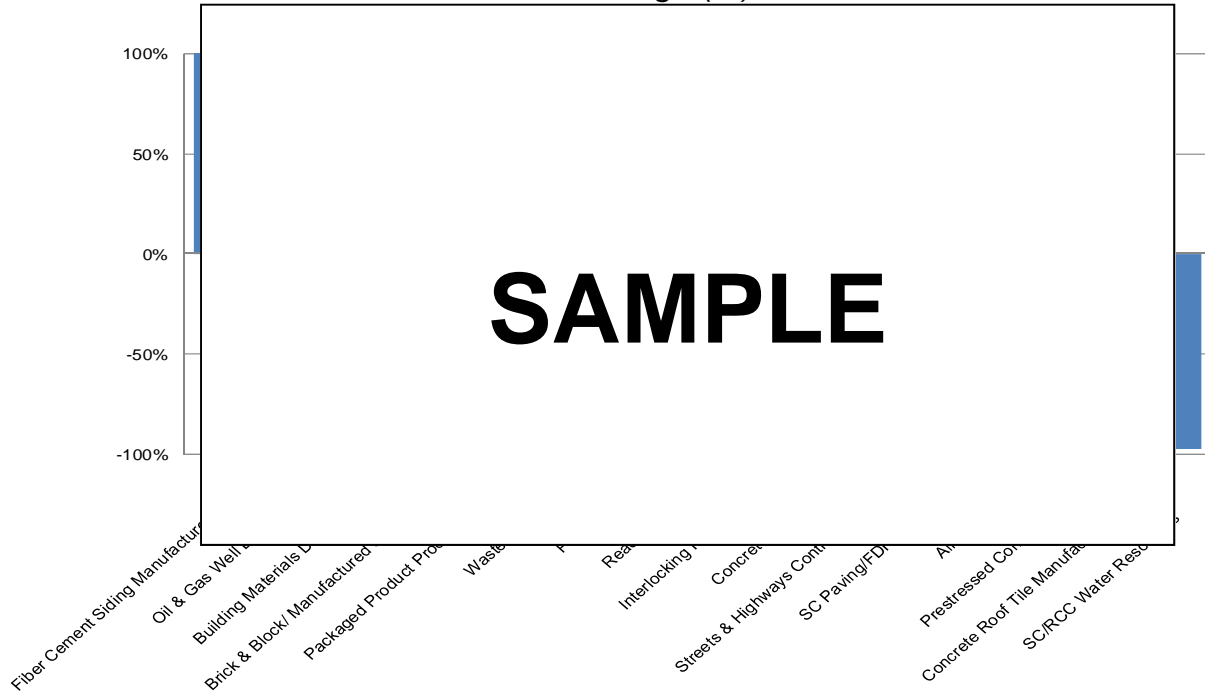
U.S. Shipments	1st Quarter
(Metric Tons)	<b>SAMPLE</b>
Ready-Mix	
Streets & Highways Construction	
Precast	
Brick & Block/ Manufacture	
Packaged Product Production	
Oil & Gas Well Drilling	
SC Paving/FDR/RCC	
Building Materials Dealers	
Concrete Roof Tile Manufacturing	
Prestressed Concrete*	
Concrete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



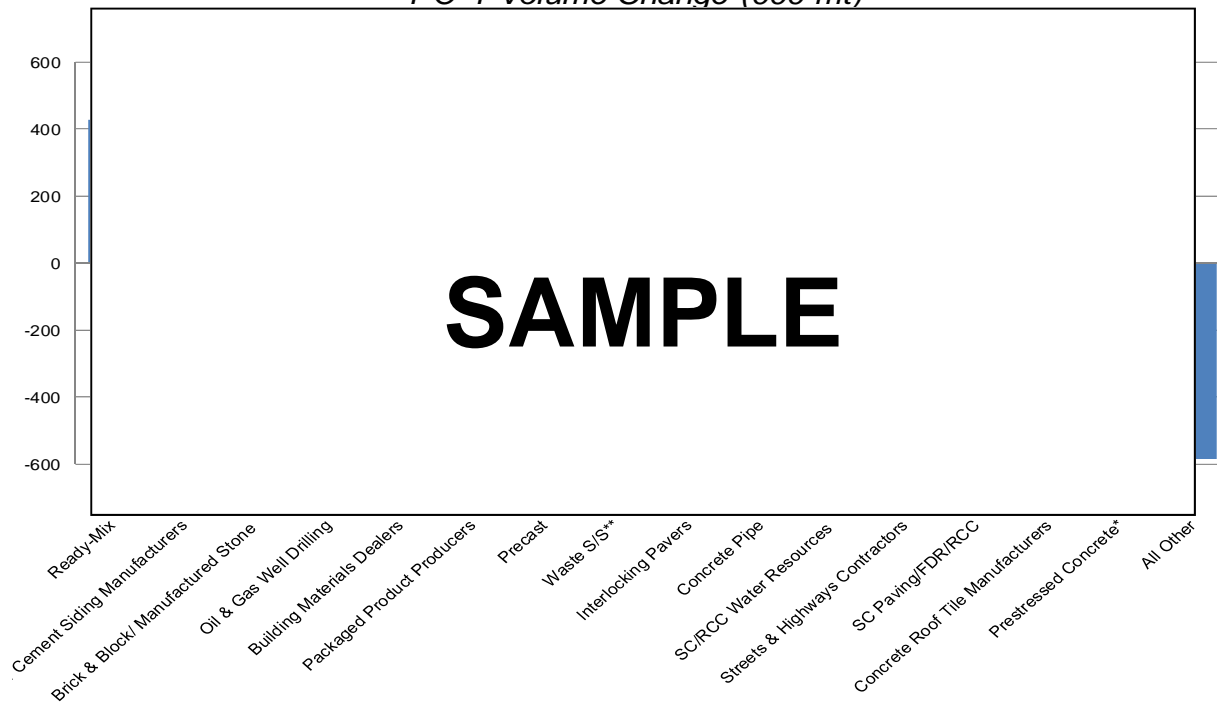


# Portland Cement Consumption, First Quarter 20xx: Analysis

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



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





## Portland Cement Consumption: 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						%
Total						%
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%	
SC/RCC Water Resources			0%	10%	90%	

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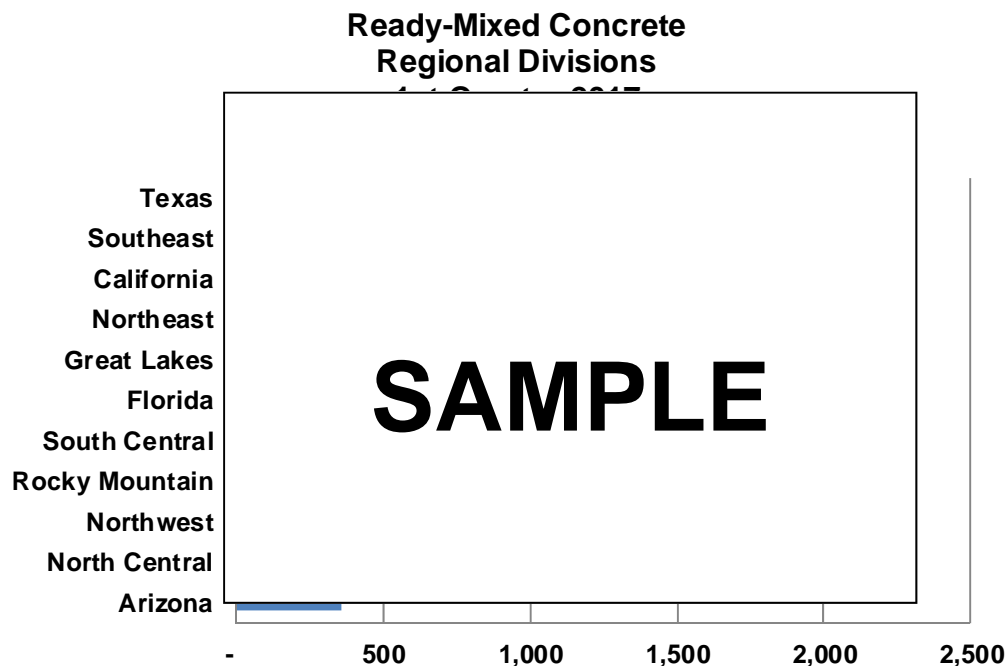
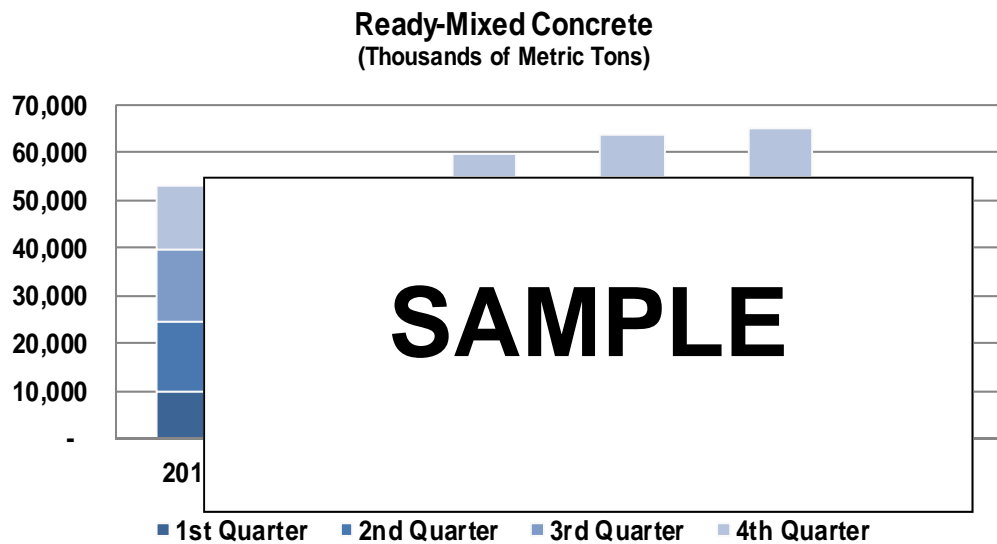


# USER GROUPS



## 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.



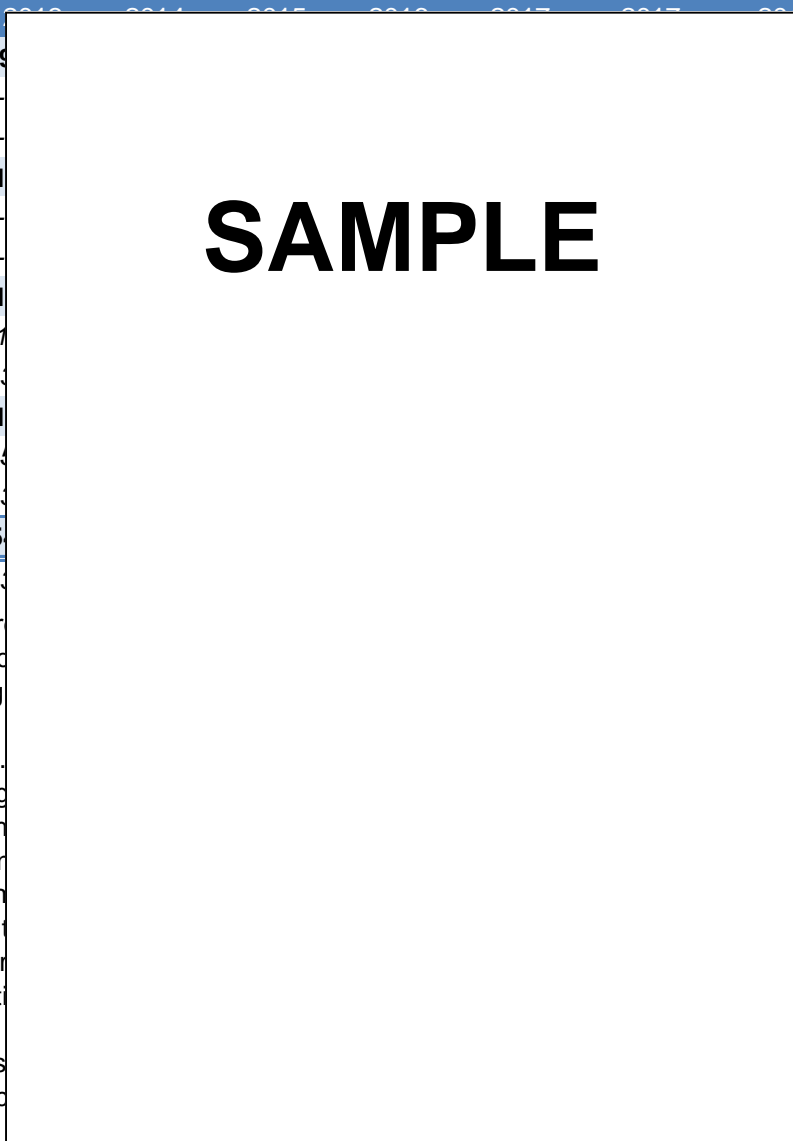
## Ready-Mixed Concrete: Analysis

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 m terms of construction spending thus far, which is where the n construction has been down t investment and possible tax r tainly have a significant posit

PCA expects the ready-mix s line with PCA's national forec

A pro- due to

s still be at- In 2017 public ructure will cer-

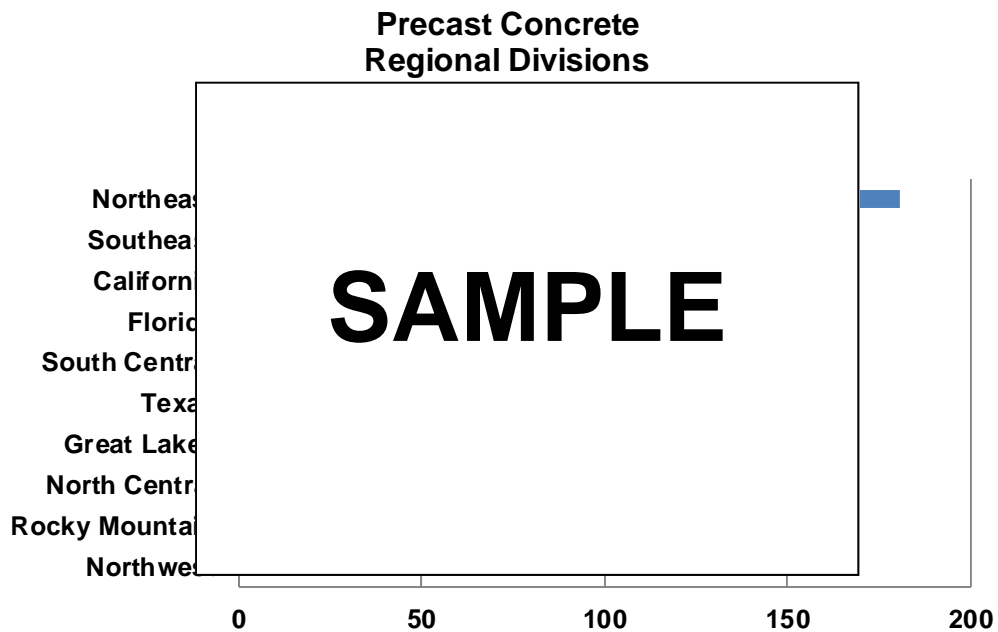
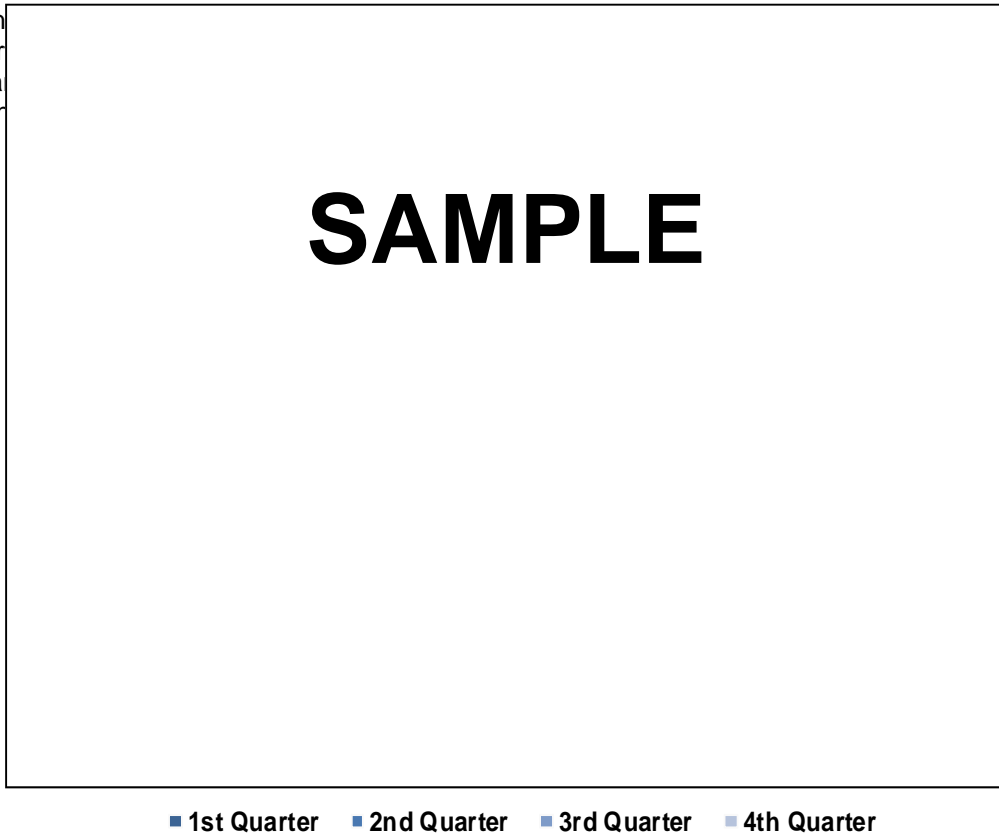
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## Precast Concrete: Data

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## 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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