

ERMCO

EUROPEAN READY MIXED CONCRETE ORGANIZATION
ASSOCIATION EUROPEENNE DU BETON PRET A L'EMPLOI
EUROPÄISCHER TRANSPORTBETONVERBAND

**EUROPEAN READY-MIXED CONCRETE
INDUSTRY STATISTICS**

YEAR 2003

JULY 2004

**EUROPEAN READY-MIXED CONCRETE INDUSTRY STATISTICS
YEAR 2003**

These statistics have been compiled for the year from Members' annual returns as of 26 July 2004.

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July 2004

TABLE 1a
Ready Mixed Concrete Industry Statistics
Year 2003

Country	No. of plants			Total production <i>x10⁶ m³</i>			Prod. per plant <i>x10³ m³</i>			Production per capita <i>m³/capita</i>			Cem.consumption <i>x10⁶ t</i>			% cement to ready-mix			Av. cem dosage <i>kg/m³</i>		
	2002	2003	Change %	2002	2003	Change %	2002	2003	Change %	2002	2003	Change %	2002	2003	Change %	2002	2003	Change %	2002	2003	Change %
Austria	250	250	0.0	9.6	10.0	4.2	38.4	40.0	4.2	1.19	1.22	2.3	4.63	4.55	-1.9	55.0	53.0	-3.6	260	260	0.0
Belgium	300	297	-1.0	9.9	9.9	0.0	33.0	33.3	1.0	0.96	0.95	-0.9	5.52	5.52	0.2	52.0	53.7	3.3	275	274	-0.4
Czech Republic	350	380	8.6	5.5	7.0	27.3	15.7	18.4	17.2	0.53	0.69	28.4	3.69	4.05	9.8	-	-	-	-	-	-
Denmark	106	108	1.9	2.3	2.2	-2.2	21.2	20.4	-4.0	0.42	0.41	-2.9	1.59	1.52	-4.5	34.0	35.0	2.9	230	230	0.0
Finland	200	200	0.0	2.6	2.3	-11.5	13.0	11.5	-11.5	0.50	0.44	-11.5	1.56	1.62	4.0	48.0	52.0	8.3	350	350	0.0
France	1663	1670	0.4	34.5	34.8	0.9	20.7	20.8	0.4	0.59	0.58	-0.6	20.73	20.68	-0.2	46.8	47.0	0.4	284	280	-1.4
<i>Germany (E)</i>	<i>1982</i>	<i>1982</i>	<i>0.0</i>	<i>46.9</i>	<i>46.9</i>	<i>0.0</i>	<i>23.7</i>	<i>23.7</i>	<i>0.0</i>	<i>0.57</i>	<i>0.57</i>	<i>-0.7</i>	<i>28.70</i>	<i>28.90</i>	<i>0.7</i>	<i>46.5</i>	<i>46.7</i>	<i>0.4</i>	<i>285</i>	<i>285</i>	<i>0.0</i>
<i>Ireland (E)</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>7.5</i>	<i>7.5</i>	<i>0.0</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>1.92</i>	<i>1.88</i>	<i>-2.5</i>	<i>3.08</i>	<i>3.40</i>	<i>10.4</i>	<i>90.0</i>	<i>90.0</i>	<i>0.0</i>	<i>300</i>	<i>300</i>	<i>0.0</i>
Italy	2500	2532	1.3	71.5	72.8	1.8	28.6	28.8	0.5	1.23	1.27	3.2	41.27	43.48	5.4	51.2	48.7	-4.9	265	265	0.0
Netherlands	196	193	-1.5	8.1	8.3	2.5	41.3	43.0	4.1	0.50	0.51	2.2	5.40	4.80	-11.1	44.0	44.0	0.0	312	312	0.0
Norway	202	198	-2.0	2.2	2.3	4.9	11.0	11.8	7.1	0.49	0.51	3.2	1.26	1.28	2.1	68.0	68.2	0.3	336	336	0.0
Poland	650	650	0.0	8.7	8.9	2.3	13.4	13.7	2.3	0.23	0.23	2.3	11.30	11.07	-2.0	25.0	26.0	4.0	330	330	0.0
Portugal	270	300	11.1	10.5	9.5	-9.5	38.9	31.7	-18.6	1.02	0.91	-10.0	10.95	9.25	-15.5	26.1	26.0	-0.4	260	250	-3.8
Slovakia	100	120	20.0	1.9	2.1	7.3	19.2	17.2	-10.6	0.36	0.38	6.9	1.67	1.72	2.6	42.0	42.0	0.0	350	340	-2.9
Spain	1500	1550	3.3	73.5	81.0	10.2	49.0	52.3	6.6	1.78	1.96	9.9	44.12	46.22	4.8	48.0	50.0	4.2	285	285	0.0
Sweden	210	205	-2.4	2.4	2.4	0.0	11.4	11.7	2.4	0.27	0.27	-1.5	1.58	1.63	3.0	59.0	-	-	350	350	0.0
Switzerland	242	260	7.4	10.0	9.3	-7.2	41.4	35.8	-13.6	1.37	1.27	-6.9	4.01	3.96	-1.4	71.4	70.3	-1.5	287	287	0.0
United Kingdom	1250	1160	-7.2	23.0	22.0	-4.5	18.4	19.0	2.9	0.39	0.37	-4.8	13.08	13.24	1.2	48.5	54.0	11.3	280	295	5.4
Total/Average	11971	12055	0.7	330.7	339.2	2.6	27.6	28.1	1.9	0.76	0.78	2.2	204.14	206.89	1.3	46.3	46.5	0.4	277.2	276.4	-0.3
Israel	210	209	-0.5	8.0	9.6	20.0	38.1	45.9	20.6	1.28	1.43	12.4	4.35	3.87	-11.0	58.0	70.0	20.7	280	280	0.0
Turkey	440	432	-1.8	26.8	28.2	5.2	60.9	65.3	7.2	0.39	0.40	2.0	26.81	28.11	4.8	26.3	30.0	14.1	280	280	0.0
Russia	-	-	-	35.0	-	-	-	-	-	0.24	-	-	36.41	-	-	-	-	-	-	-	-
USA	7000	7000	0.0	300.0	310.0	3.3	42.9	44.3	3.3	1.05	1.06	0.9	109.78	113.83	3.7	74.0	74.0	0.0	300	300	0.0
Cuba	40	-	-	0.3	-	-	6.8	-	-	0.02	-	-	0.870	0.869	-0.1	40.0	-	-	300	-	-

Legend: (E) and *italics* : Estimated on Y2002 data
grey background: Source Cembureau

Table 1b
Ready Mixed Concrete Industry Statistics
Year 2003

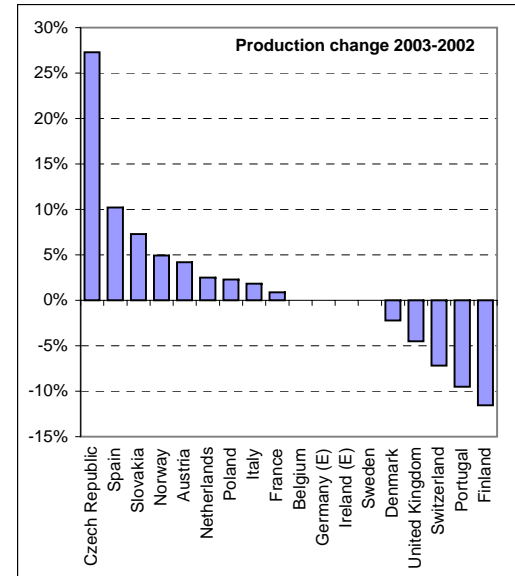
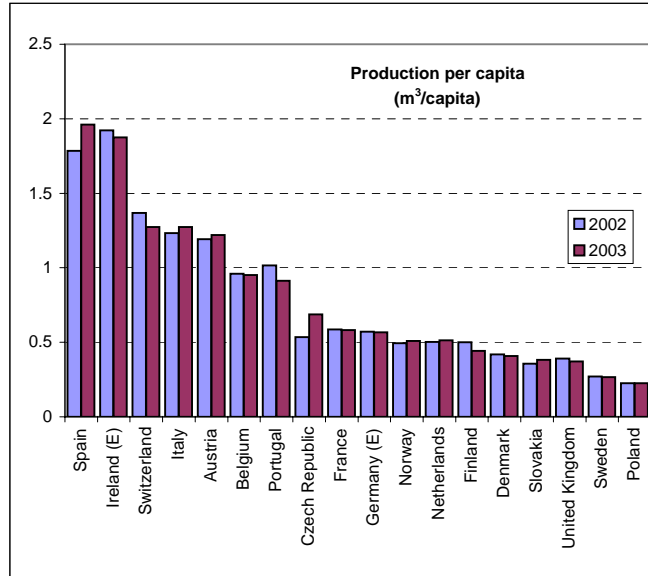
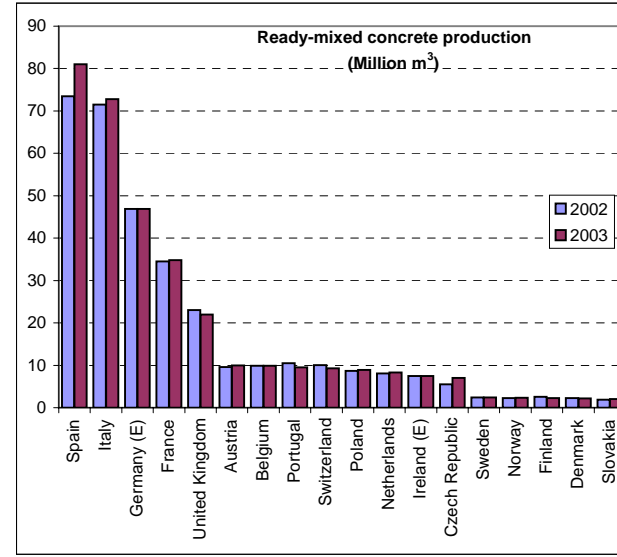
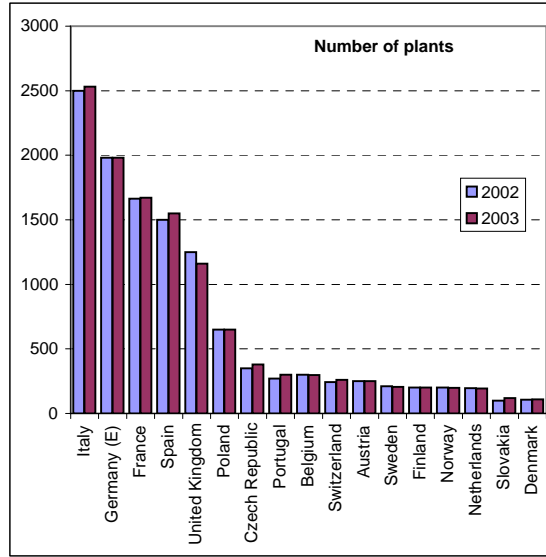


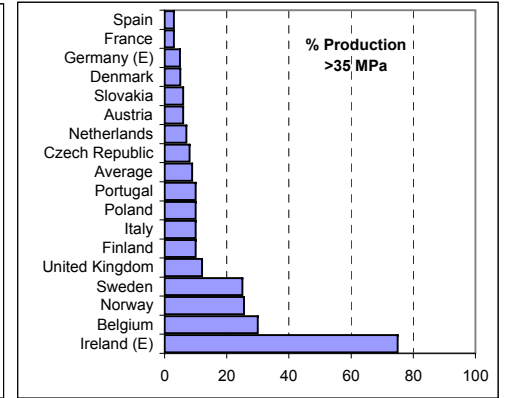
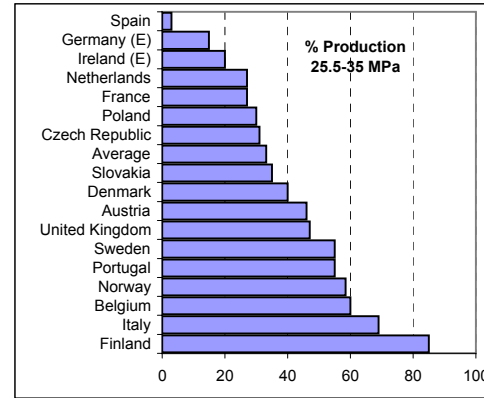
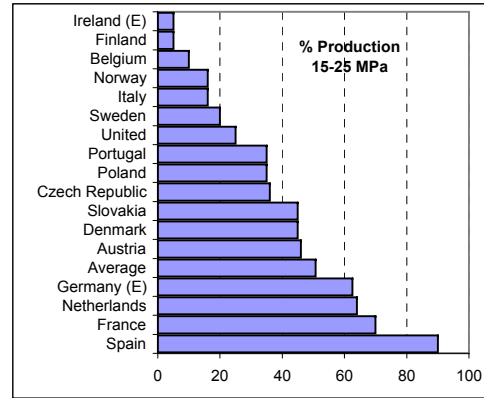
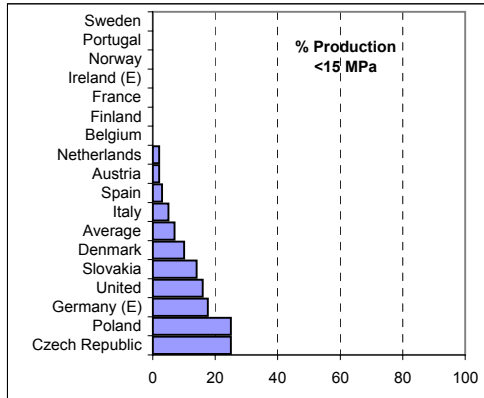
TABLE 2a
Ready Mixed Concrete Industry Statistics
Year 2003

Country	% Production per strength class								% Production per consistence class					
	Strength (MPa)								Slump class					
	<15		15-25		25.5-35		>35		S1		S2-S3		S4-S5+	
	2002	2003	2002	2003	2002	2003	2002	2003	2002	2003	2002	2003	2002	2003
Austria	2	2	46	46	46	46	6	6	5	5	45	45	50	50
Belgium	0	0	10	10	60	60	30	30	5	10	65	60	30	30
Czech Republic	-	25	-	36	-	31	-	8	-	21	-	73	-	6
Denmark	1	10	32	45	65	40	2	5	30	5	30	70	40	25
Finland	0	0	5	5	85	85	10	10	5	5	25	25	70	70
France	-	0	70	70	27	27	3	3	-	-	80	80	-	-
<i>Germany (E)</i>	18	18	63	63	15	15	5	5	12	12	82	82	6	6
<i>Ireland (E)</i>	0	0	5	5	20	20	75	75	15	15	65	65	20	20
Italy	-	5	-	16	-	69	-	10	-	53	-	41	-	5
Netherlands	2	2	64	69	27	26	7	3	-	-	-	-	-	-
Norway	0	0	17	16	59	59	24	26	1	1	0	0	99	99
Poland	30	25	40	35	25	30	5	20	10	10	20	20	70	70
Portugal	0	0	35	35	55	55	10	10	0	0	85	85	15	15
Slovakia	15	14	47	45	33	35	5	6	10	10	80	80	10	10
Spain	-	3	-	90	-	3	-	3	-	5	-	90	-	5
Sweden	0	0	25	20	50	55	25	25	3	3	57	50	40	47
Switzerland	-	-	-	-	-	-	-	-	-	-	-	-	-	-
United Kingdom	9	16	21	25	46	47	24	12	3	2	96	97	1	1
Average	8.0	6.9	46.5	50.7	32.7	33.3	12.7	9.1	6.7	19.0	76.4	69.0	16.9	12.0
Israel	3	2	15	10	60	55	22	33	1	1	4	4	95	95
Turkey	6	5	87	79	6	14	1	2	1	1	34	34	65	65
Russia	-	-	-	-	-	-	-	-	-	-	-	-	-	-
USA	0	40	5	25	80	25	15	10	-	-	-	-	-	-
Cuba	8	-	82	-	10	-	0	-	0	-	0	-	100	-

Legend: (E) and *italics*: Y2002 data

TABLE 2b
Ready Mixed Concrete Industry Statistics
Year 2003

Distribution of production by strength class



Distribution of production by consistence class

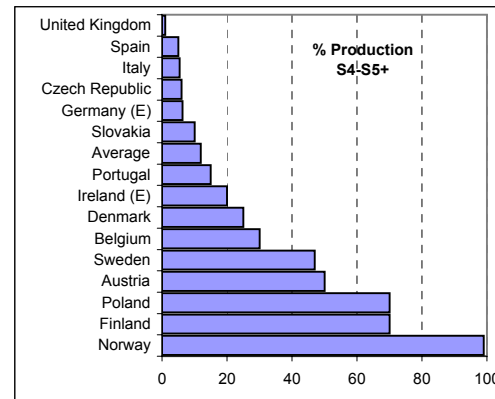
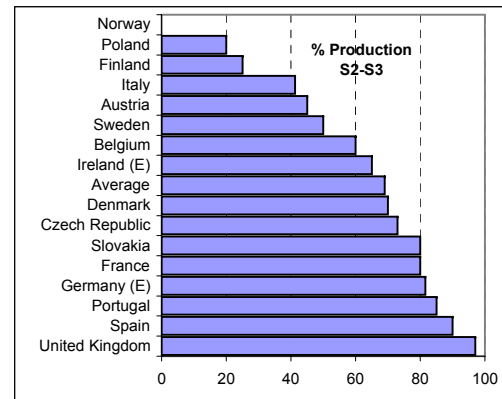
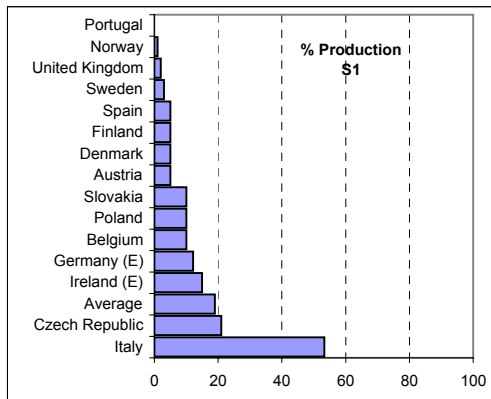


TABLE 3
European Ready Mixed Concrete Organization
Development of the Associated Members 2003-2002

Country	Producers			Plants			Employees				
	2002	2003	Change % 2003-02	2002	2003	Change % 2003-02	Members		Change % 2003-02	Country 2003	% Member/Country 2003
							2002	2003			
Austria	125	130	4.0	218	230	5.5	1849	2044	10.5	2200	92.9
Belgium	34	32	-5.9	105	96	-8.6	1700	1700	0.0	3600	47.2
Czech Republic	9	9	0.0	186	209	12.4	1488	1683	13.1	2300	73.2
Denmark	16	16	0.0	72	72	0.0	-	-	-	-	-
Finland	36	31	-13.9	96	98	2.1	750	750	0.0	850	88.2
France	198	189	-4.5	1200	1200	0.0	5748	5500	-4.3	7450	73.8
Germany (E)	-	-	-	-	-	-	6480	6480	0.0	12000	54.0
Ireland (E)	100	100	0.0	220	220	0.0	2000	2000	0.0	-	-
Italy	298	313	5.0	1060	1060	0.0	11500	12000	4.3	21000	57.1
Netherlands	80	75	-6.3	140	140	0.0	2100	2030	-3.3	2700	75.2
Norway	77	77	0.0	153	151	-1.3	934	970	3.9	1225	79.2
Poland	25	23	-8.0	179	184	2.8	1100	1100	0.0	3250	33.8
Portugal	26	28	7.7	158	155	-1.9	1250	1200	-4.0	1450	82.8
Slovakia	10	9	-10.0	35	42	20.0	285	329	15.4	950	34.6
Spain	392	416	6.1	1370	1420	3.6	13270	13600	2.5	15000	90.7
Sweden	36	35	-2.8	206	180	-12.6	1000	900	-10.0	1050	85.7
Switzerland	147	191	29.9	221	255	15.4	-	-	-	-	-
United Kingdom	24	25	4.2	1040	1005	-3.4	10000	10000	0.0	10500	95.2
Total/Average	1633	1699	4.0	6659	6717	0.9	61454	62286	1.4	85525	72.8
Israel	17	15	-11.8	180	152	-15.6	750	750	0.0	1000	75.0
Turkey	71	71	0.0	262	253	-3.4	7290	6814	-6.5	10395	65.6
Russia	-	-	-	-	-	-	-	-	-	-	-
USA	1200	1400	16.7	4620	4800	3.9	72600	74000	1.9	110000	67.3
Cuba	1	-	-	5	-	-	454	-	-	-	-

Legend: (E) and *italics*: Y2002 data

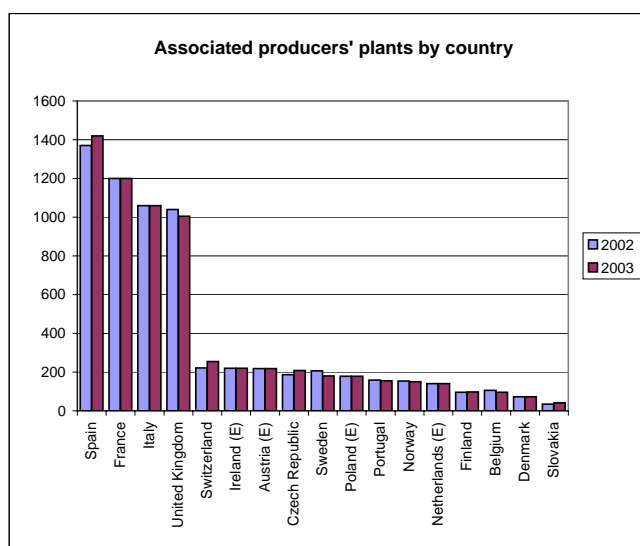
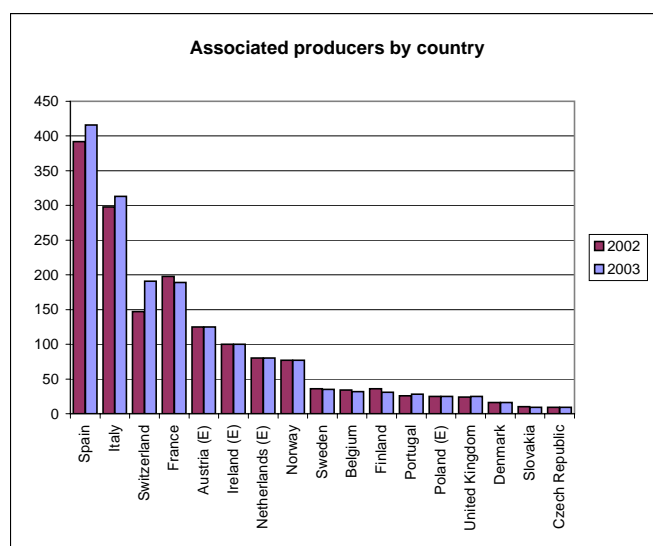


TABLE 4
European Ready Mixed Concrete Organization
Product development 2003-2002

Country	Production $\times 10^6 m^3$			Method of Production % of total				Pumped Concrete % of total		Turnover including delivery, excluding tax - $\times 10^6 \text{ €}$			Average production per plant - $\times 10^3 m^3$		
	2002	2003	Change %	Static Mixing		Dry Batching		2002	2003	2002	2003	Change %	2002	2003	Change %
				2002	2003	2002	2003								
Austria	9.00	9.40	4.4	100	100	0	0	43	43	540	540	0.0	41.3	40.9	-1.0
Belgium	5.50	5.30	-3.6	100	100	0	0	30	33	285	285	0.0	52.4	55.2	5.4
Czech Republic	4.17	5.03	20.6	94	98	6	2	-	32	220	275	25.0	22.4	24.1	7.3
Denmark	1.95	1.87	-4.1	100	100	0	0	30	25	-	-	-	27.1	26.0	-4.1
Finland	2.10	1.80	-14.3	100	100	0	0	70	70	163	157	-3.7	21.9	18.4	-16.0
France	26.91	27.20	1.1	100	100	0	0	12	12	2088	2160	3.4	22.4	22.7	1.1
Germany (E)	-	-	-	100	100	0	0	33	33	-	-	-	-	-	-
Ireland (E)	5.50	5.50	0.0	100	100	0	0	20	20	350	350	0.0	25.0	25.0	0.0
Italy	36.00	37.00	2.8	8	8	92	92	40	40	2100	2200	4.8	34.0	34.9	2.8
Netherlands	7.20	6.60	-8.3	98	98	2	2	48	48	540	512	-5.2	51.4	47.1	-8.3
Norway	1.99	2.13	7.0	98	99	2	1	45	45	249	251	0.8	13.0	14.1	8.5
Poland	3.78	4.14	9.5	100	100	0	0	35	35	171	180	5.2	21.1	22.5	6.5
Portugal	8.90	7.90	-11.2	85	85	15	15	65	60	500	440	-12.0	56.3	51.0	-9.5
Slovakia	0.61	0.86	41.4	100	100	0	0	16	20	27	41	49.9	17.4	20.5	17.9
Spain	55.00	59.30	7.8	30	30	70	70	15	15	2475	2670	7.9	40.1	41.8	4.0
Sweden	2.20	2.00	-9.1	100	100	0	0	50	50	210	210	0.0	10.7	11.1	4.0
Switzerland	9.10	8.73	-4.1	100	100	0	0	20.8	19	-	-	-	41.2	34.2	-16.9
United Kingdom	22.52	21.97	-2.4	25	24	75	76	5	14	1802	1650	-8.4	21.7	21.9	1.0
Total/Average	202.43	206.73	2.1	55.4	54.7	44.6	45.3	24.81	25.84	11720	11921	1.7	30.4	30.8	1.2
Israel	6.00	8.00	33.3	2	2	98	98	55	60	240	260	8.3	33.3	52.6	57.9
Turkey	19.10	19.50	2.1	77	77	23	23	76	73	458	500	9.2	72.9	77.1	5.7
Russia	-	-	-	-	-	-	-	10	-	-	-	-	-	-	-
USA	198.00	208.00	5.1	20	20	80	80	30	30	20000	20000	0.0	42.9	43.3	1.1
Cuba	0.13	-	-	0	-	100	-	8	-	0.49	-	-	26.0	-	-

Legend: (E) and *italics*: Y2002 data

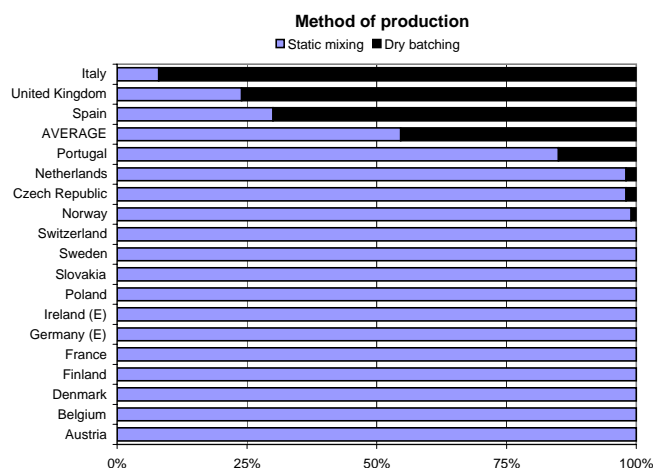
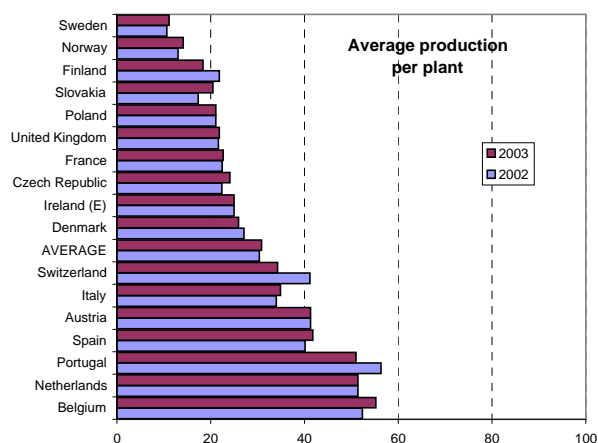
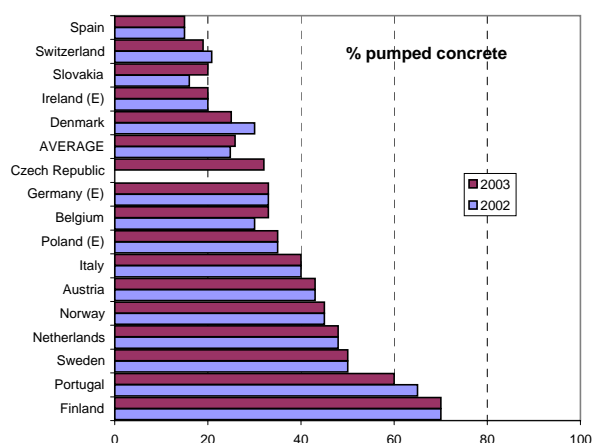


TABLE 5
European Ready Mixed Concrete Organization
Sector Development 2003-2002

Country	Production x10 ⁶ m ³		Turnover including delivery, excluding tax - x 10 ⁶ €			Employees		Turnover / production € / m ³			Turnover / employees x10 ³ € / employee		
	2002	2003	2002	2003	Change %	2002	2003	2002	2003	Change %	2002	2003	Change %
Austria	9	9.4	540	540	0.0	1849	2044	60.0	57.4	-4.3	292.0	264.2	-9.5
Belgium	5.5	5.3	285	285	0.0	1700	1700	51.8	53.8	3.8	167.6	167.6	0.0
Czech Republic	4.17	5.03	220	275	25.0	1488	1683	52.8	54.7	3.6	147.8	163.4	10.5
Denmark	1.95	1.87	-	-	-	-	-	-	-	-	-	-	-
Finland	2.1	1.8	163	157	-3.7	750	750	77.6	87.2	12.4	217.3	209.3	-3.7
France	26.91	27.2	2088	2160	3.4	5748	5500	77.6	79.4	2.3	363.3	392.7	8.1
<i>Germany (E)</i>	-	-	-	-	-	6480	6480	-	-	-	-	-	-
<i>Ireland (E)</i>	5.5	5.5	350	350	0.0	10000	10000	63.6	63.6	0.0	35.0	35.0	0.0
Italy	36	37	2100	2200	4.8	11500	12000	58.3	59.5	1.9	182.6	183.3	0.4
Netherlands	7.2	6.6	540	512	-5.2	2100	2030	75.0	77.6	3.4	257.1	252.2	-1.9
Norway	1.99	2.13	249	251	0.8	934	970	125.1	117.8	-5.8	266.6	258.8	-2.9
Poland	3.78	4.138	171	180	5.2	1100	1100	45.2	43.5	-3.9	155.5	163.5	5.2
Portugal	8.9	7.9	500	440	-12.0	1250	1200	56.2	55.7	-0.9	400.0	366.7	-8.3
Slovakia	0.608	0.86	27	41	49.9	285	329	44.6	47.2	6.0	95.1	123.5	29.8
Spain	55	59.3	2475	2670	7.9	13270	13600	45.0	45.0	0.1	186.5	196.3	5.3
Sweden	2.2	2	210	210	0.0	1000	900	95.5	105.0	10.0	210.0	233.3	11.1
Switzerland	9.1	8.73	-	-	-	-	-	-	-	-	-	-	-
United Kingdom	22.52	21.97	1802	1650	-8.4	10000	10000	80.0	75.1	-6.1	180.2	165.0	-8.4
Total/Average	202.43	206.73	11720	11921	1.7	69454	70286	57.9	57.7	-0.4	168.7	169.6	0.5
Israel	6	8	240	260	8.3	750	750	40.0	32.5	-18.8	320.0	346.7	8.3
Turkey	19.1	19.5	458	500	9.2	7290	6814	24.0	25.6	6.9	62.8	73.4	16.8
Russia	-	-	-	-	-	-	-	-	-	-	-	-	-
USA	198	208	20000	20000	0.0	72600	74000	101.0	96.2	-4.8	275.5	270.3	-1.9
Cuba	0.13	-	0.49	-	-	454	-	3.8	-	-	1.1	-	-

Legend: (E) and italics: Y2002 data

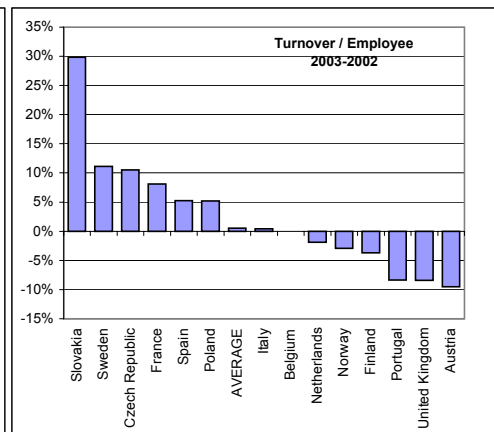
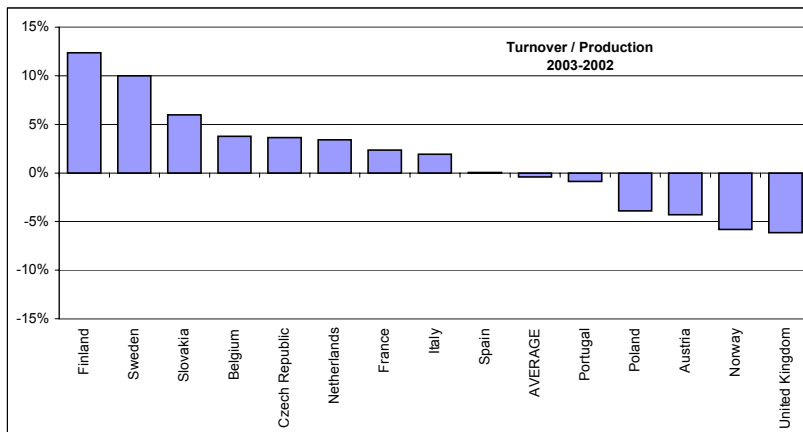


TABLE 6
European Ready-Mixed Concrete Organization
Delivery method and vehicles 2003

Country	Number of vehicles		Vehicles by capacity (2003)			Delivery method (2003)		
	2002	2003	%			Company vehicles	Outside Contractors	Customer Collection
			<6 m ³	6-8 m ³	>8 m ³			
Austria	1502	1734	46	46	8	52	38	10
Belgium	-	1550	0	60	40	60	20	20
Czech Republic	-	820	60	24	16	34	41	25
Denmark	-	400	5	85	10	98	0	2
Finland	-	400	10	85	5	30	65	5
France	6000	6000	70	27	3	13	75	12
<i>Germany (E)</i>	<i>11015</i>	<i>11015</i>	<i>0</i>	<i>24</i>	<i>75</i>	<i>25</i>	<i>65</i>	<i>10</i>
<i>Ireland (E)</i>	<i>650</i>	<i>650</i>	<i>5</i>	<i>20</i>	<i>75</i>	<i>30</i>	<i>65</i>	<i>5</i>
Italy	16000	16000	-	-	-	41	59	0
Netherlands	1150	1270	1	7	93	89	9	2
Norway	708	715	8	69	24	37	61	2
Poland	2500	2500	50	35	15	45	45	10
Portugal	1650	1700	0	60	40	10	85	5
Slovakia	300	300	93	1	6	65	23	12
Spain	14700	16200	-	95	-	50	50	0
Sweden	600	600	35	65	0	20	80	0
Switzerland	-	-	134	825	41	-	-	-
United Kingdom	6000	6000	5	95	0	11	86	3
Total/Average	62775	67854	15	61	24	36	59	5
Israel	-	1100	0	45	65	15	85	0
Turkey	2736	2587	0	85	15	73	26	1
Russia	3500	-	-	-	-	-	-	-
USA	70000	70000	5	80	15	95	5	0
Cuba	155	-	-	-	-	-	-	-

Legend: (E) and *italics*: Y2002 data

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