

dav asphalt dai

German Asphalt Industry Overview and future trends

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Classification of German roads

Motorways	1,9 %	72 % asphalt
federal roads	6,7 %	99 % asphalt
state roads	14,1 %	100 % asphalt
local roads	77,3 %	mainly asphalt

Total length of German roads: 650.000 km

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Customers of the asphalt industry

- contractor
- federal government
- states
- local authorities

⇒ couple of 1000 road constructing companies, most of them very small

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Financing of Road projects

Taxes from road traffic
(tax for cars, petrol, VAT, toll roads): 53 Mrd. €

Public expenses for roads: 17 Mrd. €

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Expenses of the Federal State for Roads

Year	Expenses (Mrd. Euro)
1999	4,37
2000	4,17
2001	4,66
2002	4,71
2003	4,66
2004	4,93
2005	5,20
2006	5,14
2007	4,93
2008	5,07
2009	6,16
2010	5,83
2011	5,41
2012 (Prelim)	5,41
2013 (Prelim)	4,97
2014 (Prelim)	4,79
2015 (Prelim)	4,81

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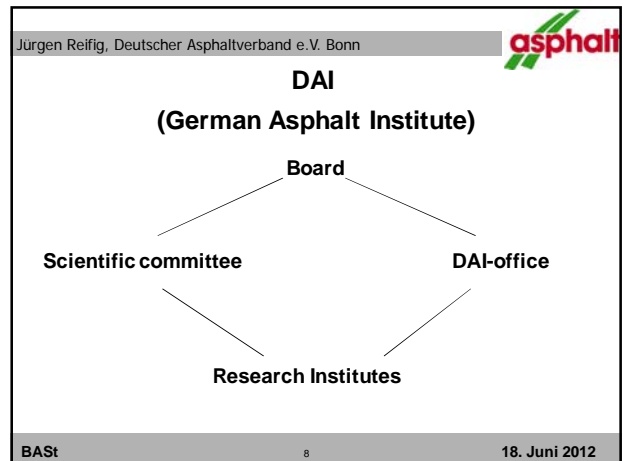
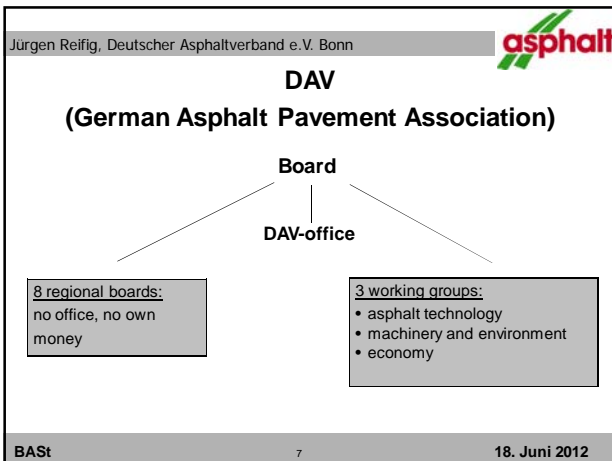
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Guarantee

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graph LR
    asphaltproducer[asphaltproducer] -- 5 years --> contractor[contractor]
    client[client] -- "2-5 years depending on course and thickness" --> contractor
  
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Members of DAV

ca. 190 asphalt producing and/or laying companies with ca. 460 mixing plants (from 650 in total)


ca. 100 associated members like laboratories, mixing plant manufacturers, bitumen suppliers ...

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Year	Asphalt-production	Recycling in Million tons and percent	Percentage of Recyclingmaterial in Production
	Million tons	Million tons	in %
2000	65	12 (from - 15, means - 80 %)	18,5
2001	63	12 (from - 15, means - 80 %)	19
2002	58	11,5 (from - 14, means - 82 %)	20
2003	55	11,5 (from - 14, means - 82 %)	21
2004	52	11,5 (from - 14, means - 82 %)	22
2005	57	11,5 (from - 14, means - 82 %)	20
2006	57	11,5 (from - 14, means - 82 %)	20
2007	51	11,5 (from - 14, means - 82 %)	23
2008	51	11,5 (from - 14, means - 82 %)	23
2009	55	11,5 (from - 14, means - 82 %)	21
2010	45	11 (from - 14, means - 79%)	24
2011	50		


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Problems of the Asphalt Industry

- More than 50 % of the production is produced from September to December
- Bitumen supply (especially during production peaks)
- CO₂ emission trade system
- Costs: bitumen, energy, aggregates ...

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Future trends

- low temperature asphalt
- porous asphalt and other noise reducing pavements
- generally: lowering the emissions during production and laying and improving the effectiveness of energy consumption
- Recycling
- Quality
- Asphalt in cities

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Questions?
Statements?