

The Roads, Minerals & Foundations sector at INTERMAT 2021 includes the following equipment and solutions:

Accessories & components for roads, minerals and foundations

Equipment & materials for road infrastructure / maintenance

Topography, new technologies, engineering, automatic systems

Drilling, boring, special foundations, trenching machines

Machines and equipment for minerals industries

**BUILDING
TOMORROW,
TODAY**

ROADS, MINERALS & FOUNDATIONS

MARKET FOCUS

Mineral Industries



IN EUROPE, the size of the aggregates industry

€20 Bn
(2018 sales)

2.7 Bn
tonnes/year

15,000
companies

26,000
sites

Demand for aggregates amounts to **5 tonnes/capita/year** (2016)

Sources: UEPG annual review 2017/2018 - data for Europe



IN FRANCE, the size of the aggregates industry

311.1 M
tonnes/year produced

€3,528 M
(2017 sales)

1,569
companies

2,300
aggregates quarries

Source: UNPG - L'industrie française des granulats, 2019 issue (data for 2017)

Roads



IN EUROPE

+12% sales of road equipment in 2018⁽¹⁾

€38 Bn

Operating and maintenance costs of road networks⁽²⁾



€69 Bn

Investment in EU road infrastructure (2016)⁽²⁾

Sources: (1) Committee for European construction equipment- Annual Economic Report, March 2019. (2) European Union Road Federation - Road statistics 2019 European Commission - Overview of transport infrastructure expenditures and costs - January 2019

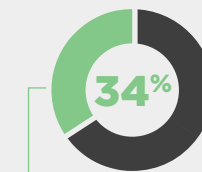


IN FRANCE

958 road and railway building contractors⁽²⁾

Roadworks expressed as a proportion of all civil works in city regions.

€29,972 M⁽²⁾ turnover (excl. VAT)



i.e. **€13,124.2 M⁽²⁾**

Source: (1) Source: FNTP 2018 - statistics for 2017 (2) Construction characteristics by activity in 2017 - Key figures at 18/10/2019 INSEE, Road and railway construction

EXHIBITORS

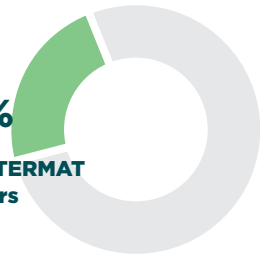
NUMBER OF EXHIBITORS

214
exhibitors



accounting for

17%
of all INTERMAT
exhibitors



1,400
exhibitors
70%
from outside France

Among the exhibitors in 2018⁽¹⁾:

ROAD INDUSTRY

ACMAR ♦ AMMANN ♦ ASTEC INDUSTRIES ♦ BENNINGHOVEN ♦ BOMAG ♦ FENDT ♦ HAMM ♦ JOSEPH VÖGELE ♦ KLEEMANN ♦ MARINI-ERMONT ♦ SAE ♦ SCHAEFER TECHNIC ♦ SECMAIR ♦ WIRTGEN

MATERIALS INDUSTRY

BHS-SONTHOFEN ♦ BYG ♦ E-MAK MAKINE INSAAT TICARET ♦ LHEUREUX & C^{IE} ♦ MAGOTTEAUX ♦ McCLOSKEY ♦ RAM ENVIRONNEMENT ♦ RUBBLE MASTER ♦ TEREX FINLAY

BORING, DRILLING, SPECIAL FOUNDATIONS

APAGEO ♦ BAUER MASCHINEN ♦ BCM DITCH WITCH ♦ CONSTRUCCIONES MECANICAS LLAMADA ♦ EPIROC ♦ ETS PAJOT ♦ EUROFOR ♦ FRASTE ♦ GROUPE MARAIS ♦ MAIT ♦ PTC ♦ RIVARD ♦ SEDIDRILL ♦ SIP & T ♦ SOCOMAFOR ♦ SOILMEC ♦ SOLLASE SOBLINTER ♦ TEC SYSTEM ♦ TESMEC ♦ THYSSENKRUPP BAUSERVICE

SURVEYING, ENGINEERING AND NEW TECHNOLOGY

LEICA ♦ RED BIRD ♦ TECHNIDRONE ♦ TOPCON ♦ TRIMBLE

(1) Non-exhaustive list

AMONG THE LEADING PRODUCTS IN THIS SECTOR FEATURE:

Surveying equipment

Laser devices, engineering services, etc.

Roadbuilding plant and equipment

Graders, asphalt plants, finishers

Compaction equipment

Rollers, tampers / rammers

Machines for the materials industry

Crushers, grinders, screening equipment

Highway maintenance

Mowers / brush cutters, sweepers, chipping spreaders, binder sprayers, winter maintenance vehicles

Drilling / Special foundations equipment

Drills, water cutters, hydraulic drills, sheet piling, boring and coring shafts, directional drilling equipment

Equipment for test boring

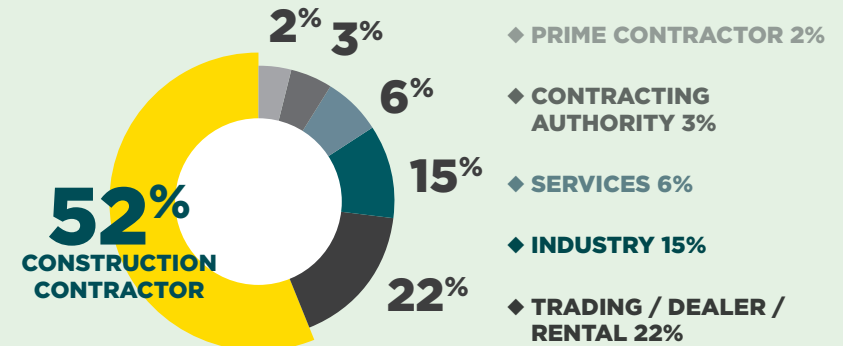
Trench-digging machines, automatic pipe inspection machines, cable laying machines

Components, equipment and accessories for roads, minerals and foundations

1 IN 2 VISITORS WORKS FOR A CONSTRUCTION CONTRACTOR

173,300
visitors
30%
from outside France

VISITORS BY SECTOR



78%
came with
PURCHASING
or **INVESTMENT**
PROJECTS⁽²⁾

67%
are **DECISION**
MAKERS,
PURCHASERS,
SPECIFIERS⁽²⁾

77%
FOUND
SOLUTIONS
TO COMPLETE
THEIR PROJECT⁽²⁾

⁽²⁾ Source: INTERMAT 2018 Visitor survey

AMONG THE OTHER EXPERTISE HUBS AT INTERMAT 2021:

EARTHMOVING,
DEMOLITION &
TRANSPORTATION

LIFTING &
HANDLING

NEW
TECHNOLOGIES

BUILDINGS
& CONCRETE
SECTOR