**Ceramic**

**KSA**

NA

**Global**

NA

**Contracting Services NDD Monitoring:**

**KSA**

Summary:

1. Nesma Kent Energy Company, a joint venture between Saudi contractor Nesma & Partners and global engineering firm Kent, has secured a significant contract with Aramco to spearhead the first phase of the National EPC Champion Initiative.
2. Contractors have submitted bids for the contract to build the performing arts centre at Qiddiya Entertainment City. The Qiddiya performing arts centre will feature over 3,000 seats in three theatres and a 500-seat cantilevered amphitheatre. Construction is progressing, with plans to open the Six Flags theme park and Aquarabia water park by 2025, boosting leisure tourism in Saudi Arabia.

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* energyconnects.com
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**Global**

Summary:

1. USA: A study of 250 American general contractors by Talker research and subcontractors found that 59% are concerned that the current tariff crises will have a direct impact on their projects and business as a whole. 35% of the projects are cancelled altogether or heavily delayed due to a lack of finances from developers.70% of the contractors face delays in payments due to contract disputes (23%), cash flow management and prioritization (21%), bank disbursement processes (18%), administrative hold-ups (14%) and manual or paper-based processes (14%).
2. USA: Oregan, Governor Kotek signed a wage theft” bill , which holds owners and contractors liable for unpaid wages of lower-tier subcontractor employees on most private projects. It includes exemptions for union workers and small projects, and mandates new record-keeping for subcontractors.
3. Singapore: Singapore’s Changi Airport Group (CAG) has awarded a contract for the construction of intra-terminal tunnels at Terminal 5 (T5) to a joint venture between Penta-Ocean Construction Co., Ltd. and Koh Brothers Building & Civil Engineering Contractor (Pte.) Ltd, valued at US$776m.
4. Brazil: Brazilian labour officials have initiated legal action against the Chinese automotive company BYD and two associated contractors, alleging the illegal trafficking of workers who endured conditions akin to slavery. The lawsuit seeks $45.5 million in damages after an investigation revealed severe labour violations affecting 220 workers. BYD faces increasing scrutiny over labour practices globally.
5. UAE: UK-based global consulting and engineering company Wood has secured a contract from TA’ZIZ, a joint venture between ADNOC and sovereign fund ADQ, to provide project management consultancy (PMC) for the UAE’s first methanol production facility.

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**Aluminium:**

**KSA**

NA

**Global**

Summary:

1. Global: Aluminum prices are fluctuating at high levels due to low inventory and off-season demand, indicating market volatility as companies navigate the impacts of tariffs and trade agreements. In China, SHFE aluminum contract is expected to trade around 20,000-20,500 yuan/mt, while LME aluminum is expected to trade around $2,430-2,490/mt.
2. Greenland: Greenland has granted a 30-year mining licence to a Danish-French consortium to extract anorthosite, a sustainable alternative for aluminium production. The project aims to be operational in five years, despite limited U.S. investment interest.
3. USA: Wall Street CEOs are navigating the "five stages of tariff grief" amid unpredictable U.S.-China trade tensions, including a 55% tariff on various Chinese imports that heavily impact the aluminium sector. Aluminium—making up about 6% of U.S. metal consumption—faces rising costs and supply chain disruptions due to increased tariffs and restrictions on technology exports and rare-earth materials.
4. USA: The USA doubled tariff on the import of aluminium from 25% to 50%, raising tension with China and the EU. Due to tariffs, the price of aluminium surged by 54% overnight as buyers adjusted to the new cost structure. The U.S. Midwest duty-paid aluminium premium reached $0.58 per lb, or $1,279 a metric ton, on June 2nd. That was a 54% jump from Friday and 164% growth since the start of 2025. Goldman Sachs said the premium would need to rise to between $0.68 and $0.70 per lb to fully reflect the 50% import tariff. LME benchmark aluminium was last up 0.4% at $2,453.5 a tonne.
5. USA: Emirates Global Aluminium said in May it would invest $4 billion in the construction of an aluminium plant in the U.S. with the first metal expected by the end of the decade with an annual production capacity of 600,000 metric tonnes.
6. Russia: Russia's economy is under significant strain due to the EU's ban on the "shadow fleet" and U.S. tariffs on its aluminium and nickel exports, which will impact non-energy sectors.
7. Middle East: The UAE, Egypt, and Jordan have launched an industrial partnership to drive sustainable economic growth across key sectors, including food production, pharmaceuticals, and metals manufacturing like steel and aluminium. Together, they aim to boost regional output, with the metals sector expected to grow by 5-7% annually, supporting broader development and collaboration in the Middle East.

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**Construction M&E:**

**KSA**

NA

**Global**

Summary:

1. Global: The construction industry is rapidly adopting AI and technology to improve efficiency and profitability, with electrical contractors poised to benefit the most. Innovations in project management, back-office automation, safety, and predictive maintenance could boost productivity by up to 20-30%, helping contractors streamline operations and stay competitive in a complex market. Embracing these tools is key to future-proofing their businesses.
2. USA: The U.S. is reimposing 25% tariffs on steel and 10% on aluminium imports, triggering fresh concerns in the construction sector. Builders could see project costs rise by 4–8%, with steel-heavy developments facing hikes of up to 10%. For housing, the impact is sharp: tariffs could add between $6,400 and $12,500 to the cost of a single-family home. With over 6 million U.S. construction workers and $1.8 trillion in annual construction spending at stake, contractors are scrambling to manage supply chain risks and cost inflation as policy uncertainty grows.

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* archup.net
* constructionbriefing.com

**Steel Rebar:**

**KSA**

NA

**Global**

Summary:

1. Global: The steel rebar market is poised for strong growth between 2025 and 2032 with a CAGR of 5.4%; it is expected to reach USD 372.41 billion, fuelled by a global push for infrastructure development, rapid urbanisation, and a steady rise in construction activity. Innovations in technology and a growing focus on sustainable building practices are also helping to drive demand.
2. USA: The Rebar Trade Action Coalition has filed petitions against steel rebar imports from Algeria, Bulgaria, Egypt, and Vietnam, alleging unfair pricing and government subsidies. These imports make up approximately 15% of the U.S. rebar market. The U.S. Department of Commerce’s investigation could lead to tariffs or restrictions, impacting rebar availability and potentially increasing prices by 5-10%, which may delay construction projects and raise costs nationwide.
3. Global: The global steel rebar market shows mixed trends: Germany maintains stable prices with steady production and robust industrial demand, while the U.S., UK, and China face price declines of up to 5-7% due to rising supply and slowing construction activity. In the U.S., increased inventory amid a 3% drop in construction starts has pressured rebar prices downward, reflecting uneven market dynamics across key economies.
4. Europe: Steel rebar prices in Northern Europe are trending downward, following similar declines seen earlier in Southern Europe. Domestic rebar prices ranged from €635 to €670 per tonne, a drop from the May month. The drop reflects uneven demand across the region with Germany holding steady while other markets face softer conditions.

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**Flat Rolled Steel:**

**KSA**

NA

**Global**

Summary:

1. Vietnam: Vietnam is examining potential dumping of hot-rolled steel from India and China, which together account for over 60% of Vietnam’s flat- rolled steel imports. Possible tariffs or import restrictions could raise prices by 8-12% and disrupt supply chains across the region. Construction and manufacturing sectors are closely watching developments to mitigate potential impacts.
2. Global: Rising demand for electric vehicles and energy-efficient appliances is driving a 15-20% annual growth in the cold-rolled steel coil market, with manufacturers increasingly adopting high-strength, low-alloy (HSLA) grades for lighter, more durable products. This shift pressures suppliers to invest in advanced processing technologies, as production costs may rise by 10-15%, making it crucial to monitor evolving material standards to maintain competitiveness.
3. Europe: The Eurasian Economic Commission (EEC) has extended anti-dumping duties on galvanised steel imports from China and Ukraine for another five years, until June 9, 2030. The move is intended to shield the domestic market from unfair competition, with duties ranging from 12.69% to 23.9%, depending on the origin and manufacturer.
4. UK: The UK government has initiated an anti-dumping investigation into hot-rolled steel plate imports from South Korea, following a complaint by Spartan UK Ltd. Imports of these products have surged from approximately 14,000 tonnes in 2021 to over 40,000 tonnes in 2024. In 2024, the UK imported $44.03 million worth of hot-rolled steel plates from South Korea. South Korea's share of the UK's hot-rolled steel imports has grown at a compound annual growth rate (CAGR) of 29.3%, the highest among major suppliers. The Trade Remedies Authority's investigation will assess whether these imports are harming the domestic industry, with stakeholders invited to submit evidence via the public file.

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**Cement:**

**KSA**

NA

**Global**

Summary:

1. Global: MIT researchers have developed an AI tool to analyse over 14,000 alternative raw materials for cement, significantly expanding the database of fly ashes and slags. In related efforts, Boral secured $15.4 million for a project aimed at reducing CO₂ emissions by optimising kiln feed, while Eco Material Technologies raised $800 million to scale up the production of supplementary cementitious materials (SCMs).
2. Global: The European Cement Association (CEMBUREAU) and European Federation of Building and Woodworkers (EFBWW) recently hosted a Brussels conference addressing future skills for the cement industry amid decarbonisation and digital transformation. The event featured 20+ research presentations, policy recommendations targeting a 30-40% emissions reduction by 2030, and discussions on implementing digital tools expected to boost productivity by up to 25%.
3. India: The Indian cement industry is forecasting a demand growth of 6–7.5% in FY26, fuelled by strong momentum in infrastructure and housing sectors. Despite some regional challenges, average cement prices rose 1.6% in May 2025, supported by better capacity utilisation and increased government spending.
4. India: India’s cement demand is projected to rise from 445 million metric tons per annum (mmtpa) in FY24 to 670 mmtpa by 2030, driven primarily by housing and infrastructure development. The industry is set to expand capacity by 30%, fuelled by significant investments and ongoing consolidation among leading producers. However, managing rising emissions continues to be a major challenge for the sector’s sustainable growth.
5. USA: The fiber cement market is rapidly expanding, valued at USD 17.5 billion in 2023 and projected to reach USD 25.56 billion by 2032. Its durability and eco-friendly properties are fuelling strong demand in construction, despite challenges such as price fluctuations. Leading companies in this space include James Hardie and Etex Group.
6. Canada: Carbon Upcycling Technologies has secured $18 million to advance its carbon capture technology for the cement industry. This funding will enable the company to scale its innovative process that transforms CO₂ and waste into low-carbon cement alternatives, promoting sustainable construction and helping reduce emissions.
7. Europe: The cement industry’s shift toward the EU’s net-zero goals is creating thousands of new jobs demanding skills in digital technology, safety, materials chemistry, and environmental practices. EU training initiatives aim to upskill over 50,000 workers by 2030, making the sector more attractive to younger talent and driving a sustainable workforce transformation.
8. Gambia: Jah Oil’s CEO, Hamidou Jah, refused to supply cement to Baboucarr Mbye amid allegations of price manipulation linked to rising tariffs. Jah accused Mbye of inflating prices by up to 15% to unfairly criticise the company and retaliate against recent tariff hikes, while Jah aimed to curb unnecessary price surges in a market already facing 10-12% tariff increases.
9. Gambia: The Gambia’s Ministry of Trade, Industry, and Employment (MoTIE) reports that Portland cement is now readily available and the market has stabilised following recent shortages caused by contract renegotiations. Current inventories include 54,457 tonnes at Jah Multi Industries, 59,000 tonnes at Salam Cement, and 21,000 tonnes at Gacem, with new shipments scheduled for June 2025.
10. Indonesia: Cement sales in Indonesia declined by 3.8% YOY to 5.314 million tonnes in May, with Sumatera bucking the trend with a 6.8% increase, while Java experienced a 4.9% drop. Overall, sales from January to May fell 1.6% to 22.768 million tonnes, even as cement exports surged 42%, primarily destined for East Timor.
11. USA: U.S. cement consumption is projected to decline by 1.6% in 2025, following a 5.2% drop in 2024, largely due to high interest rates affecting construction activity. However, ongoing trade negotiations could help restore market confidence. Looking ahead, by 2028, approximately 1 million tonnes of cement will be needed to support the growth of AI data centers, highlighting a new area of significant investment.
12. USA: The American Cement Association forecasts that the U.S. will require 1 million metric tonnes of cement in the coming years to build AI data centres. Investment in these facilities has skyrocketed, increasing by 850% over the past decade, with an estimated 6,000 centers expected by 2027. These data centres could consume up to 12% of the country’s electricity, underscoring their growing scale and impact.
13. Sri Lanka: Minister Sunil Handunnetti inaugurated a new cement plant in Trincomalee, increasing Sri Lanka’s cement production capacity by 1 million metric tonnes. This expansion brings the country’s total annual capacity to 4 million metric tonnes, making it the largest cement producer in Sri Lanka.
14. Pakistan: The Lahore High Court has upheld a 6% royalty on cement raw materials, resolving a long-standing legal delay. This ruling means manufacturers now face higher royalties—around Rs1,350 to Rs1,400 per tonne—which will tighten their cash flow and put pressure on pricing amid already slim profit margins.
15. Pakistan: Fauji Cement is a trusted name in Pakistan’s construction industry, valued for its durability and quality. As of June 13, 2025, the price for a 50 kg bag ranges between PKR 1,395 and 1,405. Its consistent pricing and competitive rates make it a popular choice among builders.
16. Norway: Norway has launched a carbon capture facility at a Heidelberg Cement plant that captures 400,000 tonnes of CO₂ annually. This initiative, part of the government-backed Longship project, aims to produce near zero- emission cement and significantly reduce greenhouse gas emissions in the industry.
17. Kyrgyzstan: A new production line at the Kant Cement Plant has been launched following a $60 million investment, adding 800,000 tons of clinker annually. The expansion is expected to create 300 new jobs and support the growing construction industry by meeting rising domestic demand and boosting exports.

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**Glass:**

**KSA**

NA

**Global**

Summary:

1. Dubai: Dubai Investments is boosting sustainable construction in the GCC by consolidating its glass businesses into Glass LLC. In 2024, Glass LLC produced over 14.8 million square meters of glass, aiming to grow Emirates Glass’s market share from 23% to 27%. Saudi American Glass also hit a record output of 927,000 square meters, up 13% year-on-year, driven by strong demand for innovative products like fire-rated and bullet-resistant glass.
2. Europe: Scientists have created a cement-free soil solidifier made from recycled glass and construction waste, offering a sustainable alternative that significantly reduces carbon emissions—potentially cutting CO₂ output by up to 30% compared to traditional cement-based methods. This eco-friendly material meets construction standards, provides cost savings, and can stabilise soil for applications like roads and foundations, while also helping to tackle growing waste management issues.
3. Global: The National Glass Association (NGA) has published a detailed five-page technical paper, "Overcoming Challenges of Circularity and Architectural Glass Recycling," which explores the benefits and hurdles of glass recycling in the U.S. The paper stresses the critical role of cullet—recycled glass—in reducing energy use by up to 30% during manufacturing, dispels common misconceptions, and offers practical strategies to maximise cullet reuse and advance sustainability in the glass industry.
4. Japan: Researchers in Japan have developed a sustainable soil solidifier using construction waste and recycled glass, offering a low-carbon alternative that could cut CO₂ emissions by up to 30% compared to traditional cement. This innovation diverts thousands of tonnes of waste annually from landfills, enhances soil strength, and addresses environmental concerns like arsenic leaching, supporting greener infrastructure projects.
5. Russia: The creation of a glass industrial cluster in Dagestan, bringing together 14 companies with an investment exceeding **35 billion** rubles, marks a major boost to the region’s glass production capacity. This initiative reflects growing industrial collaboration in the glass sector, driving economic growth and fostering innovation in the region.
6. China: Sorg has delivered its third all-electric VSM furnace to a Chinese glass manufacturer, boasting a 21 m² melting surface. This milestone highlights Sorg’s dedication to promoting sustainable glass production technologies in China’s fast-expanding market.
7. Poland : Umakov Poland will present its all-glass balustrade systems at the WinDoGlass Innovation Expo. With over 30 years of expertise, Umakov delivers customised solutions for modern architecture, featuring high-quality fittings, stainless steel components, and aluminium fencing.

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**Elevator:**

**KSA**

NA

**Global**

NA

**HVAC**

**KSA**

NA

**Global**

NA

**Wood:**

**KSA**

NA

**Global**

Summary:

1. Global: Metsä Group has completed the sale of its wood supply business in Latvia to ACA Timber. This transaction, announced on March 3, 2025, had no significant financial impact on Metsä Group. All employees will transfer to ACA Timber. Long-term deliveries of pulpwood and chips are agreed upon.
2. USA: Kadant (KAI) secured $18M in orders from lumber producers in North America and Europe, expected to ship between late 2025 and Q3 2026. The equipment will enhance wood processing for orientated strand board and lumber, incorporating smart technology for improved productivity.
3. New Zealand: Vienna Woods reports strong demand for premium hardwood flooring in Auckland, emphasizing sustainable and authentic materials. Their engineered timber collections, including European oak and walnut, meet strict standards and offer various finishes.
4. Estonia: In May 2025, Estonia's producer price index rose by 0.2% from April and 0.5% from last year, driven by higher prices in wood and food products. The export price index increased by 0.4%, while the import price index fell by 0.4%.

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