

Memberships in Trade Associations and Industry Bodies

Review of Climate Policy Positions

April 2021



LafargeHolcim

A circular logo with the words 'net zero' in a white, handwritten-style font in the center. The words 'BUILDING FOR' are at the top and 'PEOPLE & PLANET' are at the bottom, all in a white, sans-serif font following the curve of the circle.

BUILDING FOR
net zero
PEOPLE & PLANET

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Magali Anderson,
Chief Sustainability and
Innovation Officer

“The year 2020 was a signature year for sustainability at LafargeHolcim. Among the many milestones we reached, I am proud we became the first global building materials company to sign the United Nations Global Compact’s ‘Business Ambition for 1.5°C’ initiative with intermediate targets approved by the Science Based Targets initiative (SBTi) in alignment with the net zero pathway. On our journey to net zero we have set the most ambitious 2030 climate goals in our industry and have partnered with the SBTi to define our net zero roadmap beyond 2030.

Such strong commitment is not only transforming the way we operate but also how we engage with our external stakeholders. On the 70 markets where we operate, we are committed to engage with governmental bodies in a transparent and constructive way to create the enabling framework needed to achieve climate neutrality for our company. To support our advocacy, we are active members of more than 200 organizations around the world.

To further strengthen our advocacy voice, we decided to review our memberships in trade associations and industry bodies to ensure that there are no major gaps between their climate policy positions and our own policy positions. To proceed with this assessment, we have selected 20 organizations around the world that are representative of our geographical footprint and of our advocacy spending. I am happy to report that we have found no major misalignment.

Going forward, we will continue to work with those organizations to develop the enabling regulatory framework for a net zero world. We also commit to work with our local advocacy teams to have a similar systematic assessment of all organizations that we are a member of.”

LafargeHolcim's Trade Associations Climate Review

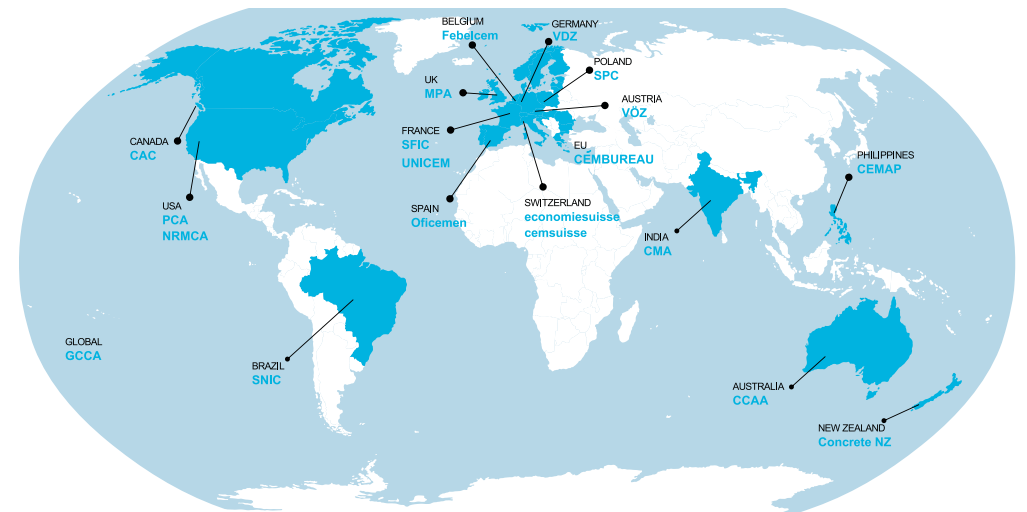
In September 2020, LafargeHolcim was the first global building materials company to sign the UN Global Compact's "Business Ambition for 1.5°C" initiative, with a 2030 SBTi-verified action plan. As part of this net zero climate pledge, LafargeHolcim has identified key policy enablers that form the core of its policy positions and advocacy, including:

- Effective carbon pricing mechanisms
- Market demand for low-carbon products and solutions
- Large-scale deployment of advanced technologies, such as carbon capture usage and storage (CCUS)

In support of this commitment and associated policy enablers, LafargeHolcim has decided to assess its memberships in its main trade organizations around the world. The aim was to ensure that those organizations have no major misalignment with the Group's policy positions on climate change.

Methodology & scope

To proceed with this assessment, LafargeHolcim has analyzed its memberships around the world and made a selection of 20 organizations. Those were selected to reflect both the size of the Group's financial contribution to the organizations (above CHF 250,000) and the Group's geographical footprint. All in all, these organizations represent c. 80% of the total amount that the Group paid to trade organizations in 2020.



Map of organizations reviewed

The core review was led by the corporate public affairs team based on the organizations' public positions, on their website, media releases, publications and social media. A questionnaire was also sent to the organizations based on the five criteria (see below) to complement the analysis and give the opportunity to bring additional positions into the review. When needed, a discussion was organized with the local public affairs team to ensure a good understanding of the policy landscape and alignment in the analysis. The analysis was then reviewed with the Group's sustainability and stakeholder engagement team.

Each organization has been assessed according to five criteria, based on LafargeHolcim's net zero climate pledge and policy enablers:

- **Supports Paris Agreement and net zero agenda**
i.e. does not deny the need to have climate policies and to progress towards a net zero world
- **Supports the use of Carbon Pricing Mechanisms**
i.e. support the implementation of carbon price through market mechanisms (e.g. EU ETS) or fiscal mechanisms (e.g. carbon taxes) as a tool to deliver a net zero economy
- **Existence of a climate net zero roadmap (mainly for cement industry associations)**
i.e. has developed (or is in the process of developing) the industry roadmap to net zero
- **Acknowledge the need of advanced technologies, including CCUS, to further decarbonize (mainly for cement industry associations)**
i.e. supports the view that advanced technologies, including CCUS, will be needed to decarbonize hard-to-abate sectors like ours
- **Supports the need to introduce low-carbon and/or net zero products on the market**
i.e. considers it has an active role to develop the regulatory framework to incentivize the development of markets for low-carbon and/or net zero materials and solutions

Given that the organizations selected have various scopes (cement associations, ready-mix industry representatives, multi-sectoral business organizations) and diverse regulatory environments (different levels of government commitments to climate policy and carbon pricing), some of the topics are not covered by all the organizations. This policy landscape was considered in the review of each organization.





Main Results

None of the selected organizations have material misalignment or diverging views with LafargeHolcim's policy positions. However, some organizations do not have formal positions on some of the topics assessed. In most cases, the lack of formal position can be explained by the absence of regulatory initiatives locally (e.g. no carbon pricing projects in the country) or the scope of the organization (e.g. development of a net zero climate roadmap would be complex for multi-sectoral business organizations).

The influence of the Global Cement and Concrete Association at global level and of CEMBUREAU at EU level is visible in the positions taken by national cement organizations. This supports LafargeHolcim's choice to have an active role in both organizations (presidency, board memberships, working group chairmanships).

Specifically on each topic:

- **Paris Agreement:** There is a unanimous support to the principles of climate policy and decarbonization of our industry, but not all organizations have taken a formal position on the Paris Agreement.
- **Carbon pricing:** All organizations engage with governments and stakeholders on carbon pricing mechanisms when there is a regulatory project. Some have a reactive approach.
- **Net zero roadmap:** A vast majority of organizations have or are planning a climate roadmap (in most cases taking the full value chain in consideration). CEMBUREAU and GCCA's work in this area is driving and informing many of the national initiatives.
- **Advanced technologies:** Almost all organizations surveyed engage proactively on the development and deployment of advanced technologies for decarbonization, including Carbon Capture Usage and Storage.
- **Low-carbon products:** All organizations are active in promoting low-carbon products, including through the regulatory framework and public procurement.

Way forward

After this review, LafargeHolcim has decided to pursue its work with all the organizations included in the scope. LafargeHolcim intends to be an active contributor to the climate roadmaps that some of those organizations are currently working on.

For the two organizations that do not have a position on the Paris Agreement (NRMCA in the USA, and CCAA in Australia), it was agreed with the local teams that they will exchange with the concerned organizations in view of taking a more formal position over the next couple of months.

The Group will continue to assess its trade association memberships on a periodic basis. In addition to this centralized assessment, the Group will initiate a systematic review process to be undertaken at country level.

In 2022, the Group intends to update this review to include an assessment of the results of those actions.

Summary of organizations and positions

	Worldwide	EU	Switzerland		UK	Belgium	Spain	France	Germany	
	GCCA	CEMBUREAU	cemsuisse	economiesuisse	MPA	Febelcem	Oficemen	SFIC	UNICEM	VDZ
Supports Paris Agreement and net zero agenda	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes
Supports carbon pricing mechanisms	■ Other - No formal position	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes
Existence of a net zero roadmap	■ Yes - Work in progress	■ Yes	■ Yes - Work in progress	■ Other - No formal roadmap but net zero commitment to 2050	■ Yes	■ Yes - Work in progress	■ Yes	■ Yes	■ Other - Not relevant	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Other - Not relevant	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes
	Poland	Austria	USA		Canada	Brazil	Australia	New Zealand	Philippines	India
	SPC	VÖZ	PCA	NRMCA	CAC	SNIC	CCAA	Concrete NZ	CEMAP	CMA
Supports Paris Agreement and net zero agenda	■ Yes	■ Yes	■ Yes	■ Other - No formal position but supports low-carbon concrete	■ Yes	■ Yes	■ Other - Supports decarbonization efforts and will formalize its position in 2021	■ Yes	■ Yes	■ Yes
Supports carbon pricing mechanisms	■ Yes	■ Yes	■ Other - No formal position	■ Other - No formal position	■ Yes	■ Yes	■ Other - Not formal position given policy context	■ Yes	■ Other - No formal position	■ Other - No formal position
Existence of a net zero roadmap	■ Yes	■ Yes - Work in progress	■ Yes - Work in progress	■ Other - No formal position	■ Yes - Work in progress	■ Yes - Roadmap with PA 2°C scenario for cement	■ Yes - Work in progress	■ Yes	■ No	■ No
Recognizes the need of advanced technologies, including CCUS	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Other - No formal position	■ Other - No formal position
Supports introduction of low-carbon and/or net zero products	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes	■ Yes

LafargeHolcim's approach to advocacy and government affairs

As the world's global leader in building solutions, LafargeHolcim engages with public authorities around the world on issues that are relevant to its business activities. The Group is committed to giving reliable and up-to-date information to public authorities. The Group remains politically neutral, supports freedom of expression and respects other stakeholders' rights to express their opinions and positions. The Group does not make political donations, unless it is expressly permitted under written local laws and applicable LafargeHolcim policies and guidelines, and transparently and accurately recorded.

Those principles form part of the Group's **Responsible Lobbying and Advocacy Directive**. The Directive is applicable to all LafargeHolcim employees engaging with Public Authorities. LafargeHolcim has a strict **Anti-Bribery & Corruption policy** that applies to its lobbying and advocacy activities. Annual training is conducted in countries on the Anti-Bribery & Corruption policy. To ensure compliance with its policies, the Group has a number of tools and procedures in place such as the Minimum Control Standards and the Integrity Line. LafargeHolcim enrolls in lobbying and transparency registers where applicable and where it exists. By way of example, LafargeHolcim is a participant of the EU Transparency Register, where advocacy activities, priorities and estimated spending in EU affairs are listed.

Targeted engagement with diverse stakeholders

LafargeHolcim engages with a diversity of stakeholders active or influential on policy regulations that are linked to its activities:

- National authorities, government officials, members of Parliament, regional and local authorities where the Group operates
- Trade and business organizations in operating countries (e.g. US's Portland Cement Association, Canada Association of Cement, economiesuisse), at regional (e.g. EU's CEMBUREAU) and global level (e.g. Global Cement and Concrete Association, World Business Council for Sustainable Development)
- International coalitions (e.g. Carbon Pricing Leadership Coalition, Global Alliance for Buildings and Construction)
- Multilateral bodies (UN agencies, OECD)
- Think tanks and NGOs (Business for Nature)

The Group is a member of more than 200 organizations in 70 countries. LafargeHolcim Group companies reported spending CHF 15.8 million* on direct advocacy activities in 2020.

*excludes corporate memberships



Advocating in support of LafargeHolcim's policy positions

Employees within LafargeHolcim designated to engage with public authorities are clearly identified. In countries, Country CEOs (CCEO) are accountable for advocacy activities. At corporate level, the Public Affairs function is under the responsibility of the Executive Committee member in charge of sustainability. LafargeHolcim requires that any third-party that engages with public authorities on its behalf undergo due diligence.

When possible, LafargeHolcim aims to have a proactive role in the organizations, associations and coalitions it is a member of (board membership, working group chairmanship, active membership, etc.). Employees that are active in trade associations that LafargeHolcim is a member of or associated with are systematically engaging in a way that reflects

LafargeHolcim's positions and ambitions. LafargeHolcim works to ensure that the positions of these organizations are aligned to its own while working in full respect of the governance rules in place in all trade associations. The Group's main policy positions are made available externally on its website and circulated to its internal public affairs network on a regular basis.

Should major divergences in positions appear, LafargeHolcim will work proactively with the organization in question to find alignment. If no alignment can be found, LafargeHolcim will dissociate itself from the organization in question and related activities, or in extreme cases, renounce its mandates within the organization and/or its membership. LafargeHolcim undergoes regular assessment of the

organizations it is a member of, to evaluate benefits and risks of its memberships. In case of major misalignment with an organization, the Group is ready to quit the organization, as it has done in the past. In 2021, following a careful review assessment of its organizations in the USA, LafargeHolcim decided to leave an industry organization due to misalignments on climate positions.



Annex

Focus on each organization included in this review

Global Cement and Concrete Association (GCCA)

GCCA's membership consists of cement producers from across the globe. GCCA is quickly working towards a membership accounting for 50% of global cement production capacity.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Other
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

The Global Cement and Concrete Association (GCCA) published in September 2020 its Climate Ambition, which states the industry's commitment to reducing its carbon emissions and binds its members to aspire to carbon neutrality by 2050. By the end of 2021, the GCCA intends to develop a 2050 Roadmap for carbon neutral concrete. It will set a long-term vision for the industry and the value chain and include a clear plan for linking the technologies, strategies, policies and levers required. We can expect to include a more formal position on carbon pricing mechanisms as climate policy tools.

CCUS is identified by the organization as a technology for further reducing the cement sector's process emissions. The GCCA's Innovandi research network supports research in the development of CCUS solutions.

Low-carbon product demand is also part of the decarbonization levers. In its Climate Ambition, the organization states the policy framework it needs to support its transition which include: 'Drive the demand for sustainable building materials by helping to stimulate market demand for innovative products by construction contractors and customers'. The GCCA is also actively engaging with global policy makers (UN, We Mean Business, WRI, IFC, Mission Possible Platform, etc.) to incentivize demand for low-carbon products and services.

Learn more in the GCCA Climate Ambition: www.gccassociation.org/climate-ambition/

CEMBUREAU

The European Cement Association based in Brussels is the representative organization of the cement industry in Europe.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

CEMBUREAU supports the implementation of climate policies elaborated over the last years by the European Union to deliver on the Paris Agreement. In its 2050 Carbon Neutrality Roadmap published in May 2020, CEMBUREAU states that the industry it represents intends to be aligned with the 2°C scenario of the Paris Agreement in 2030, by reducing CO₂ emissions from cement by 30% and by 40% down the value chain. The organization engages with EU stakeholders on a very frequent basis on the climate policy and carbon pricing tools (EU ETS, carbon border adjustment mechanism, etc.).

Elaborating on the 5 'C's along the value chain (clinker, cement, concrete, construction and re-carbonation), the 2050 carbon neutrality roadmap lays out the vision on how the cement-concrete industry can reach net zero

by 2050. It includes a set of policy enablers to support this transition. CCUS is identified as a key lever in the sector's carbon neutral roadmap (-42% potential reduction by 2050), along with the development of markets for low-carbon products.

Learn more in the CEMBUREAU 2050 Carbon Neutrality Roadmap: www.cembureau.eu/library/reports/2050-carbon-neutrality-roadmap/.

cemsuisse

cemsuisse represents the cement industry in Switzerland.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

cemsuisse supports Switzerland's climate commitments and the Paris Agreement. cemsuisse is currently working on a climate roadmap, expected for later this year.

cemsuisse supports market-based carbon pricing tools and was active in the discussion to implement the Swiss ETS and its linking to the EU ETS. cemsuisse acknowledges that, to further reduce process emissions, the industry will need

technologies such as carbon capture and storage. Low-carbon products are also identified as key levers to reduce emissions. In its position on the Paris Agreement and on how to implement the Agreement in Switzerland, cemsuisse supports the need to include the built-environment as part of the CO₂ law.

economiesuisse

economiesuisse represents the interests of the competitive, internationally networked and responsible Swiss business community.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Other
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

economiesuisse supports Switzerland's climate goals and policies to reduce carbon emissions. The organization has been supportive of the Paris agreement since its existence and committed in December 2020 to reach carbon neutrality by 2050. This commitment doesn't entail a roadmap (complex given its sector-wide scope) but identifies policy levers to achieve this ambition. The organization is also working on identifying actions that will support this ambition, including CCUS.

economiesuisse recently called for a global carbon price, to ensure comparable climate policy conditions around the world. economiesuisse supports the development of a regulatory framework that incentivizes the uptake of low-carbon solutions.

Learn more in economiesuisse's media release on carbon neutrality: www.economiesuisse.ch/fr/articles/economiesuisse-soutient-lobjectif-zero-emission-nette-dici-2050

Mineral Products Association (MPA)

MPA is the UK industry trade association for the aggregates, asphalt, cement, concrete, dimension stone, lime, mortar and silica sand industries.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

The Mineral Products Association (MPA) supports the UK government's target of net zero emissions by 2050. The organization has developed and published in November 2020 a comprehensive roadmap which sets a pathway to delivering a net zero cement and concrete industry by 2050.

MPA supports the use of carbon pricing as a policy tool and is active in supporting CCUS pilot projects. CCUS is identified as one of the levers of the 2050 roadmap. MPA is also proactive in promoting low-carbon solutions to the market, through consultation standards and via its Sustainable Concrete initiative.

Learn more in MPA's UK Cement and Concrete Industry Roadmap to Beyond Net Zero:
www.thisisukconcrete.co.uk/TIC/media/root/Perspectives/MPA-UKC-Roadmap-to-Beyond-Net-Zero_October-2020.pdf

Febelcem

Febelcem is the trade association representing the cement industry in Belgium.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

Febelcem is committed to reducing the sector's climate impact. The organization fully supports the CEMBUREAU 2050 carbon neutrality roadmap and is in the process of developing its own, expected in the first half of 2021. The organization has already developed in 2016 a climate roadmap to 2050 in the framework of the Walloon government plan with 3 levers identified: circular economy, energy efficiency and CCUS.

In terms of carbon pricing, Febelcem supports CEMBUREAU's position on EU ETS and carbon border adjustment mechanisms and relays such positions to Belgian stakeholders (Belgian cabinets, experts

and MEPS). CCUS is identified as one of the levers in the CO₂ reduction roadmap and Febelcem intends to be more active in 2021 on the topic.

Febelcem is proactive in promoting low-carbon solutions, through its active involvement in implementing norms and standards for cement and concrete. Moreover, the organization promotes the application of full life cycle assessments via the Belgian tool TOTEM, which enables to calculate the environmental impact of construction.

Oficemen

Oficemen represents all companies devoted to the comprehensive production of cement that have manufacturing plants in Spain.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

Oficemen published back in 2017 a first roadmap featuring the sector's decarbonization path, in support of the Paris Agreement. Since then, Oficemen published in December 2020 a roadmap describing the path to net zero by 2050 along the value chain. It is much aligned with the CEMBUREAU roadmap and features levers along the '5 C's (clinker, cement, concrete, construction and re-carbonation).

In the roadmap, CCUS is identified among the levers to reduce carbon emissions for the industry. The support to low-carbon products is also a lever, with the roadmap emphasizing on the role of public procurement and on focusing on the sustainability properties of construction materials.

Oficemen is active in supporting the implementation of a carbon border adjustment mechanism in the EU.

Learn more in the Oficemen roadmap to carbon neutrality by 2050: www.oficemen.com/wp-content/uploads/2020/12/Hoja-de-ruta-del-cemento-neutralidad-clim%C3%A1tica-en-2050.pdf

Syndicat Français des Industries Cimentières (SFIC)

SFIC represents the cement industry players in France.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

The Syndicat Français des Industries Cimentières (SFIC) engages on a regular basis with policy makers on climate policy and is committed to reducing the industry's carbon emissions. The organization also supports CEMBUREAU's policy approach on carbon pricing mechanisms (ETS, CBAM). SFIC presented in 2018 how the industry can be "very low-carbon", by reducing process emission by 80% by 2050, while the rest is being absorbed by concrete during its lifetime through re-carbonation, which enables the whole value chain to reach net zero.

SFIC is active in promoting breakthrough solutions such as CCUS through subsidies. The organization also promotes innovative research on accelerating re-carbonation through the Fastcarb project. SFIC engages with public authorities on reducing carbon

emissions down the value and promotes low-carbon solutions, including through public procurement and norms.

Learn more in the SFIC brochure on a low-carbon cement industry: www.infociments.fr/sites/default/files/article/fichier/INDUSTRIE-CIMENTIERE-REDUCTION-EMISSIONS-CO2.pdf

Union nationale des industries de carrières et matériaux de construction (UNICEM)

UNICEM is an inter-professional federation which brings together representatives from the mineral mining industry in France (stones, sand, non-metallic minerals).

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Other
Recognizes the need of advanced technologies, including CCUS	■ Other
Supports introduction of low-carbon and/or net zero products	■ Yes

The Union nationale des industries de carrières et matériaux de construction (UNICEM) was active during the COP 21 and welcomed the Paris Agreement. The organization fully supports the climate policy ambitions and promotes the industry's contribution to climate mitigation (enhancing biodiversity, improving resource efficiency and promoting low-carbon solutions down the value chain).

Although the organization has no formal position on carbon pricing, it supports fiscal incentives that will help reach climate ambitions. UNICEM is also active in promoting low-carbon products, including through public procurement.

Given its scope (aggregates business), UNICEM has not taken a position on CCUS and does not have a net zero roadmap.

Learn more in the UNICEM media release on the Paris Agreement:
www.unicem.fr/wp-content/uploads/r0-cdp-cop21.pdf

Verein Deutscher Zementwerke (VDZ)

The VDZ represents both economic policy and technical/scientific interest groups in the German cement industry.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

The Verein Deutscher Zementwerke (VDZ) has taken clear commitments to reduce the climate impact of the industry and acknowledges that the industry's carbon footprint remains a challenge. In November 2020, the VDZ published its roadmap "Decarbonising Cement and Concrete: A CO₂ Roadmap for the German cement industry", which includes a scenario for the industry to reach net zero by 2050. The roadmap details the technology mix that will be needed to reach carbon neutrality and CCUS is identified in this scenario. This lever was promoted by the VDZ leadership during interviews on the roadmap.

Regarding markets and low-carbon products, the VDZ is active to underline the need for green markets, better taking into account carbon footprint of cement, concrete and construction and that states that a suitable political framework will be necessary to allow

a market to develop for low-carbon cement and concrete. VDZ is supportive of carbon pricing tools but hasn't taken any official position on the topic according to the response made by the organization. The VDZ engages with policy-makers on its use.

Learn more in the VDZ roadmap "Decarbonising Cement and Concrete: A CO₂ Roadmap for the German cement industry":
www.vdz-online.de/en/aktuelles/german-cement-industry-on-course-for-a-carbon-free-future

Stowarzyszenie Producentów Cementu (SPC)

Stowarzyszenie Producentów Cementu represents the cement industry in Poland.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

The Stowarzyszenie Producentów Cementu (SPC) supports the development of climate policies and promotes the actions taken by the industry to reduce carbon emissions over the last decades. SPC is active within CEMBUREAU and has contributed to its 2050 carbon neutrality roadmap. The roadmap was endorsed by SPC and translated into Polish.

As such, we consider that the organization is supportive of carbon pricing mechanisms, the development of advanced technologies such as CCUS and the need to support the development of markets for low-carbon products.

Learn more in Polish 2050 climate roadmap: www.polskicement.pl/mapa-drogowa-2050/

Vereinigung der Österreichischen Zementindustrie (VÖZ)

VÖZ represents the Austrian cement players.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

The Vereinigung der Österreichischen Zementindustrie (VÖZ) is supportive of the goal of the EU to become carbon neutral by 2050. The Austrian cement industry has shown its commitment to decarbonize over the last years and has one of the highest fuel substitution rates and the lowest CO₂ emissions per ton of cement. The VÖZ endorsed the CEMBUREAU 2050 carbon neutrality roadmap and is currently working on its own 2050 roadmap for Austria (expected for 2021).

The VÖZ is supportive of CEMBUREAU's carbon pricing positions, such as the carbon pricing border mechanism project. The organization is also active in promoting CCUS pilot projects, such as the C2PAT project (Lafarge Austria is part of the

project). VÖZ is also active in promoting low-carbon solutions, including through the development of EPDs.

Learn more in the media release on the 2050 CEMBUREAU climate neutrality roadmap: www.zement.at/service/presse/15-2020/299-klimaneutral-bis-2050-ziele-und-meilensteine-der-oesterreichischen-zementindustrie

Portland Cement Association (PCA)

The Portland Cement Association is the premier policy, research, education, and market intelligence organization serving America's cement manufacturers. PCA members represent 92 percent of US cement production capacity and have facilities in all 50 states.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Other
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

The Portland Cement Association (PCA) welcomed in January 2021 the decision taken by the new US administration to rejoin the Paris Agreement. The organization had previously announced in November 2020 that it is developing a Carbon Neutrality Roadmap for the Cement and Concrete Industry.

Regarding carbon pricing mechanisms, PCA declined to take any position on particular regulatory initiatives and rather supports general principles, including "support to market-based policies and initiatives that enable the industry's continued reduction of its carbon footprint in a responsible and sustainable manner", according to the questionnaire response made by the organization.

PCA is active in supporting the use of CCUS by engaging with policymakers to provide increased funding and a more coordinated effort to develop commercially viable

carbon capture technologies available. The organization is also active in promoting building codes that cover sustainability issues (contributions to LEED and National Green Building Standard).

Learn more in the Media Release welcoming the USA rejoining the Paris Agreement: www.cement.org/newsroom/2021/01/20/pca-welcomes-us-rejoining-international-partners-on-global-climate-change

and in the Media Release on the Carbon Neutrality Roadmap for the Cement and Concrete Industry: <https://www.cement.org/newsroom/2020/11/17/portland-cement-association-to-further-sustainability-goals-by-creating-carbon-neutrality-roadmap-for-the-cement-and-concrete-industry>

National Ready Mixed Concrete Association (NRMCA)

The National Ready Mixed Concrete Association is the leading industry advocate for Ready-Mixed and Concrete businesses in the USA.

Supports Paris Agreement and net zero agenda	■ Other
Supports carbon pricing mechanisms	■ Other
Existence of a net zero roadmap	■ Other
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

The National Ready Mixed Concrete Association (NRMCA) has not taken formal positions on climate policy, including on the Paris Agreement. However, the organization is active in promoting low-carbon concrete and has created a taskforce to develop a policy position on low-carbon concrete legislation.

It supports incentive schemes to low-carbon solutions, such as an incentive scheme from 2013 in support of fly ashes inclusion in concrete (resulting in the reduction of carbon footprint). NRMCA is also a supporter of the 45Q, a US federal tax incentive for carbon capture and storage.

NRMCA is active in promoting low-carbon products on the market with ongoing research, promotion and education in the development and adoption of low-carbon and energy efficient concrete construction materials that reduce the embodied and operational carbon of concrete structures.

NRMCA states its support to member companies who take net zero climate commitments.

LafargeHolcim USA will exchange over the next couple of months with NRMCA in view of taking a more formal position on the Paris Agreement.

Cement Association of Canada (CAC)

The Cement Association of Canada (CAC) represents five cement companies with clinker and cement manufacturing facilities across Canada.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

The Cement Association of Canada (CAC) is committed to supporting its Members in reducing the sector's GHG emissions, including by working with governments and other stakeholders to create opportunities for sectoral leadership in addressing climate change. The CAC is an affiliate member of the GCCA and welcomed the GCCA's commitment to deliver carbon neutral concrete by 2050. To that end, the Cement Association of Canada is developing a Canadian roadmap to carbon neutrality to support efforts in Canada and align with the GCCA's global initiative. The roadmap is expected to be completed by the end of 2021, accompanied by a Canadian cement sector climate ambition statement.

The CAC actively advocates across all the key levers necessary to decarbonize the industry, including deep investments in potentially transformative technologies

such as CCUS, with the aim of turning concrete of the future into a "carbon sink". The CAC is working with member companies to promote CCUS pilot projects.

There are a variety of national and sub-national pricing systems in place in Canada and for the past decade the CAC has worked (and continues to work) with governments and relevant stakeholders across Canada to ensure that these carbon pricing mechanisms are designed to prevent carbon leakage, enshrine equal treatment for building materials, and offer competitive incentives to invest in low-carbon technologies.

The CAC has worked actively with municipal, provincial and federal governments to create the framework for low-carbon procurement, based on life cycle analysis.

Sindicato Nacional da Indústria do Cimento (SNIC)

The Sindicato Nacional da Indústria do Cimento represents the cement industry in Brazil.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

The Sindicato Nacional da Indústria do Cimento (SNIC) has developed and published in 2019, in partnership with international organizations such as IFC (World Bank), IEA, and WBCSD, a decarbonization roadmap for the cement industry in Brazil. The Brazilian Cement Technology Roadmap looks at various carbon emission scenarios, including one meeting the 2°C scenario of the Paris Agreement. Conscious that expectations towards a net zero world are increasing, the SNIC is today an active contributor to the GCCA's net zero roadmap and is considering an update of its own roadmap to align with the net zero ambition. In its roadmap, CCUS is identified as one of the levers to reduce emissions from the industry. The SNIC is active in developing and promoting low-carbon solutions through the adoption of norms and standards for low-carbon cements and engagement with municipalities.

The SNIC published in November 2020 a position paper in favor of carbon pricing, sketching its recommendations (market-based mechanisms, recognition of historical efforts, robust monitoring, etc.).

Learn more in the SNIC's Brazilian Cement Technology Roadmap:
www.snica.org.br/relatorio-roadmap.php

and its media release on carbon pricing:
www.snica.org.br/noticias-ver.php?id=41¬icia=%20Carbon%20Pricing

Cement Concrete and Aggregates Australia (CCAA)

Cement Concrete & Aggregates Australia is the peak body for the heavy construction materials industry in Australia. Its members operate cement manufacturing and distribution facilities, concrete batching plants, hard rock quarries and sand and gravel extraction operations throughout the nation.

Supports Paris Agreement and net zero agenda	■ Other
Supports carbon pricing mechanisms	■ Other
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

The Cement Concrete & Aggregates Australia (CCAA) has not taken a formal position on the Paris Agreement but is supportive of reducing the industry's carbon footprint and will formalize its position in 2021. The organization is currently developing its sustainability strategy and a roadmap for the cement industry, which is expected for September 2021.

Given the current policy framework in Australia on carbon pricing, CCAA has no formal positions on such policy tools. CCAA recognizes that CCUS will be necessary to decarbonize the industry.

CCAA is actively involved in developing performance-based codes and standards for cement, concrete, alternate binders, supplementary cementitious materials and concrete construction technology that will

help stimulate innovation and support the introduction of new low-carbon technologies. CCAA is active in promoting the use of LCA analysis.

Holcim Australia will support CCAA over the next couple of months in the development of its climate strategy and in view of taking a more formal position on the Paris Agreement.

Learn more in the CCAA's submission to the Draft National Climate Change Fund Strategic Plan:
www.ccaa.com.au/imis_prod/documents/ClimateChange.pdf

Concrete New Zealand

Founding member organizations of Concrete NZ are the Cement & Concrete Association of New Zealand (CCANZ), the New Zealand Concrete Masonry Association (NZCMA), the New Zealand Ready Mixed Concrete Association (NZRMCA), Precast New Zealand (PCNZ) and the New Zealand Concrete Society (NZCS).

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Yes
Existence of a net zero roadmap	■ Yes
Recognizes the need of advanced technologies, including CCUS	■ Yes
Supports introduction of low-carbon and/or net zero products	■ Yes

Concrete New Zealand supports New Zealand's Climate Change Response (Zero Carbon) Amendment Act, and its objective to ensure New Zealand plays its part in reducing Greenhouse Gas Emissions (GHG) under the Paris Agreement. Concrete NZ states that the concrete industry is fully committed to becoming net carbon neutral by the Government's target date of 2050. It has developed a vision up to 2030 to reduce emissions by 30% vs. 2005 and is halfway through its target.

Concrete NZ is supportive of the country's Emissions Trading Scheme as one of the policy tools to deliver on the climate ambitions. The organization supports the assessment of advanced technologies in New Zealand, such as CCUS.

Concrete NZ is active in promoting low-carbon products on the market, via building regulations, promotion of life cycle analysis (LCA) for buildings and EPDs.

Learn more in Concrete NZ's industry vision on climate:
www.concretenz.org.nz/page/s_industry_vision

Cement Manufacturers Association of the Philippines (CEMAP)

Cement Manufacturers Association of the Philippines represents the cement industry in the Philippines.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Other
Existence of a net zero roadmap	■ No
Recognizes the need of advanced technologies, including CCUS	■ Other
Supports introduction of low-carbon and/or net zero products	■ Yes

The Cement Manufacturers Association of the Philippines (CEMAP) is supportive of the industry's decarbonization ambitions and has taken a commitment to reduce the cement carbon footprint in its industry roadmap. If the Philippines is a member of the Paris Agreement, it has no known project of carbon pricing mechanisms. Given the country's policy context, the organization is not as advanced in its climate policy positions as other organizations included in this review.

CEMAP is active in promoting changes in standards to promote the use of low-carbon blends.

CEMAP is also very active in promoting waste management solutions, to answer one of the country's most pressing environmental challenges.

Cement Manufacturers Association in India (CMA)

The Cement Manufacturers Association in India is the apex body of large cement manufacturers in India.

Supports Paris Agreement and net zero agenda	■ Yes
Supports carbon pricing mechanisms	■ Other
Existence of a net zero roadmap	■ No
Recognizes the need of advanced technologies, including CCUS	■ Other
Supports introduction of low-carbon and/or net zero products	■ Yes

The Indian Cement Industry is the first and only core Industry sector to have its sectoral level Low Carbon Technology Roadmap (LCTR), developed by the WBCSD/CSI and well-aligned with the Country's Nationally Determined Contribution (NDC) targets. The Cement Manufacturers Association (CMA) endorses the low carbon growth pathway supported by a few cement companies, members of the WBCSD/CSI. According to the LCTR report in 2018, as a mid-century target, the Indian Cement Industry aims to achieve a 45% reduction in its emission intensity from a baseline level of 2010.

CMA supports the use of alternative fuels and resources in representing the Cement Industry at various working groups and committees appointed by government agencies to develop standards, rules, policy guidelines, regulatory frameworks, etc.

CMA has no formal position on carbon pricing, while there are no known-projects in India for such policy tools. While CMA has no formal position on CCUS, this advanced technology is identified as a potential lever to decarbonize the Indian cement industry in the LCTR roadmap.

Learn more in Low Carbon Technology Roadmap (LCTR) 2018 update: www.docs.wbcsd.org/2018/11/WBCSD_CSI_India_Review.pdf

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