

‘Action, progress and next steps – a global perspective’

An update of global action and progress
of the GCCA and its member companies -
as we advance on our mission.

Congresso FICEM
May 12th 2026

Thomas Guillot
CEO

Members operate in most countries in the world

GCCA is the leading global cement & concrete association

Our Members

- Asia Cement Corporation
- Arkan
- Breedon Group
- BUA Cement
- Buzzi
- Cementir Holding
- Cementos Argos
- Cementos Pacasmayo
- Cementos Progreso
- CEMEX
- Cimenterie Nationale
- Cimsa
- City Cement
- CNBM
- CRH
- Dangote
- Fletcher Building
- GCC
- Heidelberg Materials
- Hima Cement
- Holcim
- Huaxin Cement
- JSW Cement
- Kartuli Cement
- Limak Cimento
- Medcem
- Moctezuma
- Molins
- Neshor Israel Cement Enterprises
- Norm Cement
- SCHWENK Zement
- Siam Cement Group
- Siam City Cement
- Taiheiyo Cement
- TCC Group Holdings CO., LTD.
- TITAN Group
- TPI Polene
- UltraTech Cement
- UNACEM
- Vassiliko Cement
- Votorantim Cimentos
- Yura Cement

National & Regional Association Partners

- American Cement Association
- Asociación de Fabricantes de Cemento Portland – Argentina
- Asociación de Productores de Cemento – Peru
- Associação Brasileira de Cimento Portland – Brazil
- Association of German Cement Manufacturers (VDZ) – Germany
- Association Professionnelle des Cimentiers – Morocco
- Azerbaijan Cement Producers Association (ACPA)
- Betonhuis – Netherlands
- BIBM – Europe
- CANACEM – Mexico
- Canadian Precast Prestressed Concrete Institute
- Cement Association of Canada
- Cement Concrete & Aggregates Association – Australia
- Cement Europe
- Cement Industry Federation – Australia
- Cement Manufacturers Association – India
- Cement Manufacturers Ireland
- China Cement Association
- Concrete NZ – New Zealand
- European Federation Concrete Admixtures
- European Ready Mixed Concrete Organisation
- Federacion Iberoamericana del Hormigon Premezclado – LatAm
- Federacion Interamericana del Cemento (FICEM) – LatAm
- France Ciment
- Japan Cement Association
- Mineral Products Association – United Kingdom
- National Ready Mixed Concrete Association – USA
- South Indian Cement Manufacturers Association
- Thai Cement Manufacturers Association
- Agrupación de Fabricantes de Cemento de España: Oficemen – Spain
- Turkish Cement Manufacturers Association (Turkcimento)

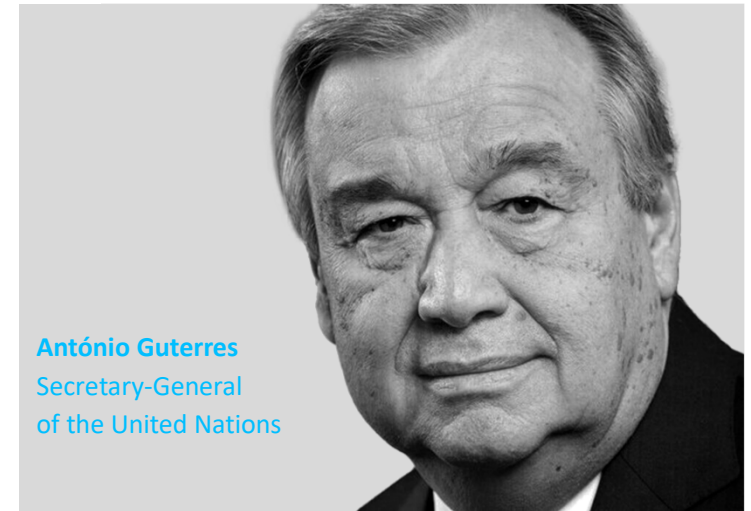
Concrete is essential... But needs to be decarbonised

“ Three quarters of the infrastructure that will exist in 2050 has yet to be built.

Without credible action now, future generations will have no liveable planet to build upon.

The United Nations stands ready to support you in accelerating the transformation of your industry.

I invite all cement companies to join this vital endeavour.”



World's infrastructure needs to 2050



By 2050

9.8 billion

Estimated world's population by 2050

68%

Percentage of population living in cities

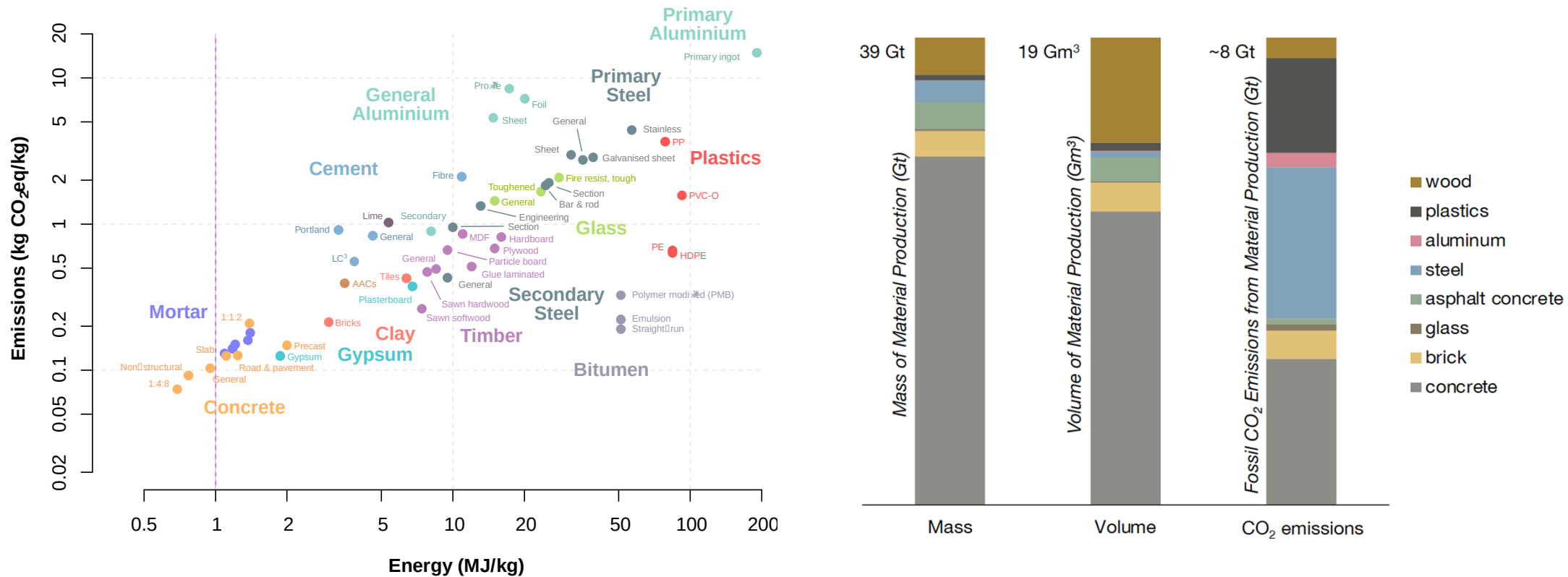
70%

Percentage of land use in most cities comprising housing

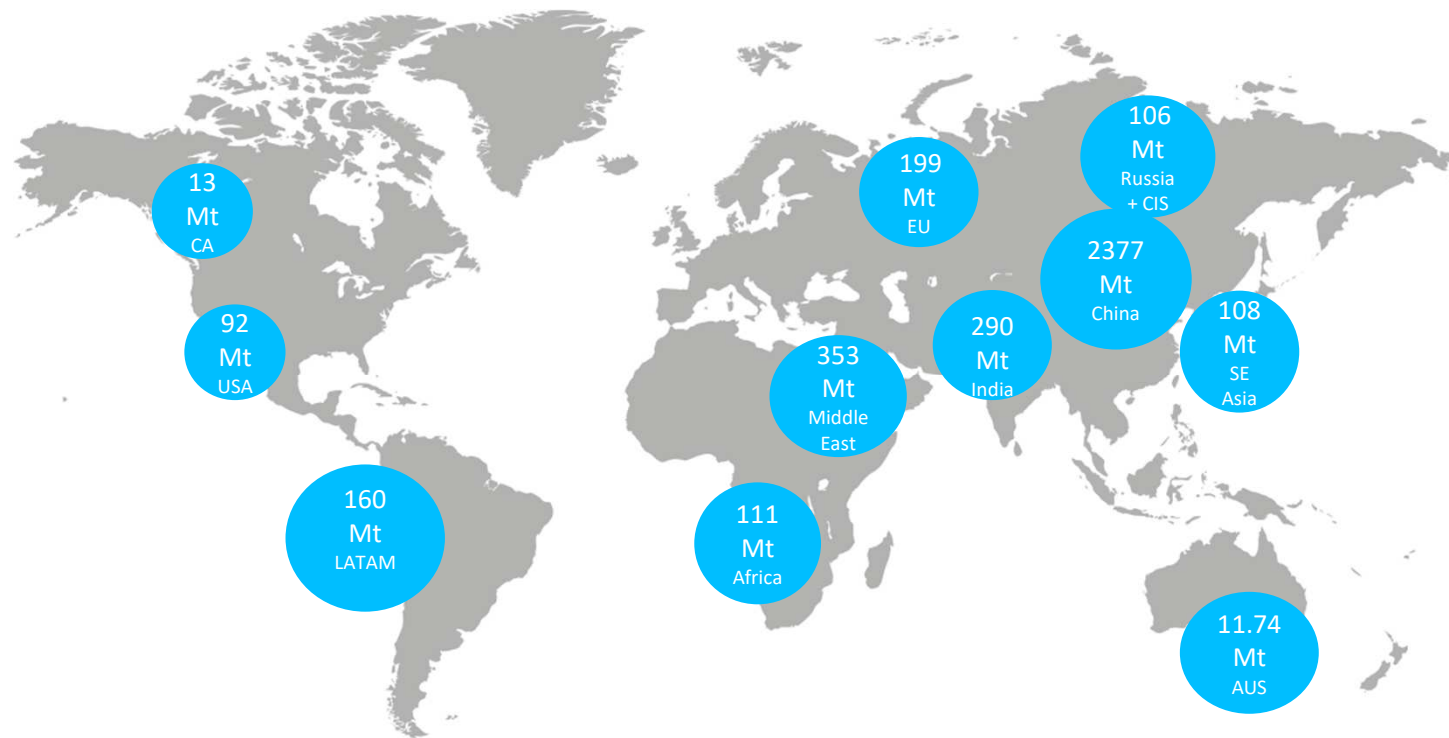
80%

Percentage urban water demand is predicted to increase

Challenge 1 - concrete comes with heavy CO2 footprint... In large footprint relates to the wide usage of the material



Challenge 2 - Cement Production sits in Emerging and Developing countries

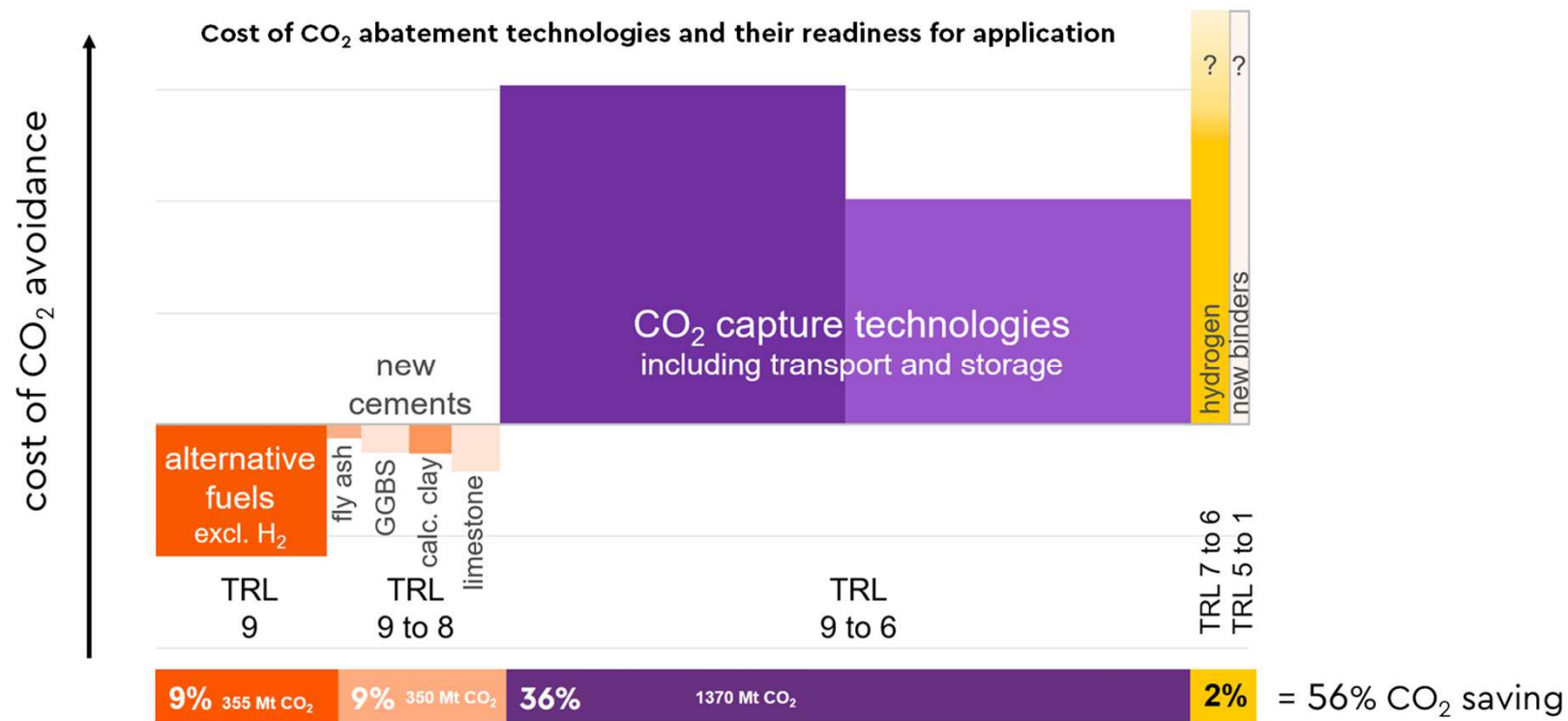


Global cement production has reached **4.20 bnt***.

Notably, the **Global South**, encompassing LATAM, the Middle East, Africa, and India, accounted for approximately **84% of this total output**.

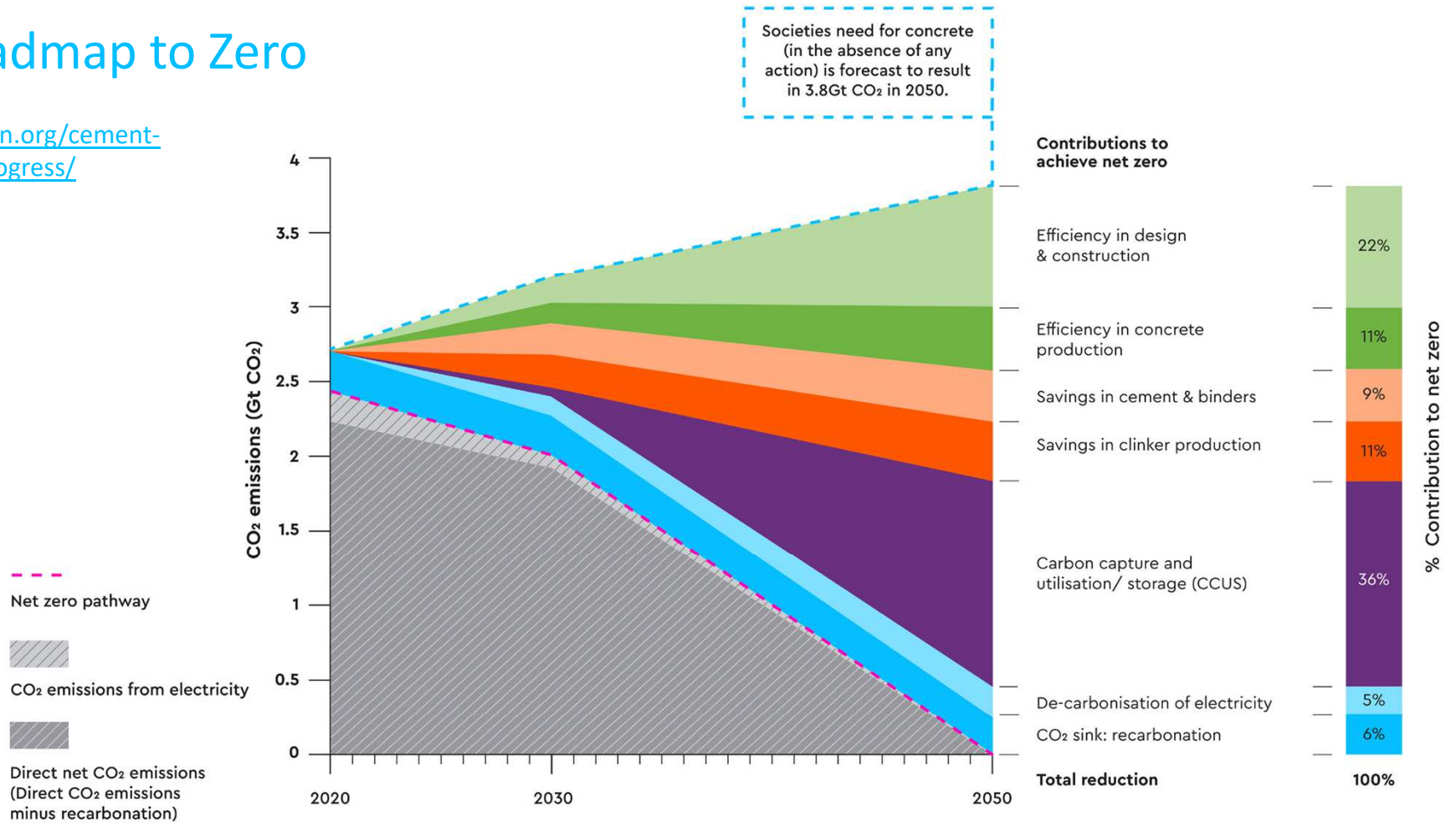
The North America, Europe, CIS and Australasia represent 16% of the world production

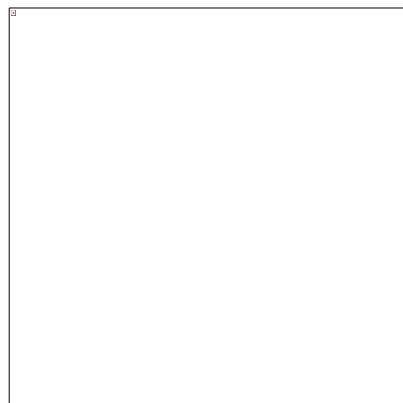
Challenge 3 – Net Zero technologies requires a step-change in cement plant OPEX and CAPEX



Global Roadmap to Zero

<https://gccassociation.org/cement-industry-net-zero-progress/>





CO₂ emissions*

25%

Reduction in net CO₂ emissions per tonne cementitious (1990 baseline)



Energy

18%

Energy efficiency improvement (1990 baseline)



Fossil fuel

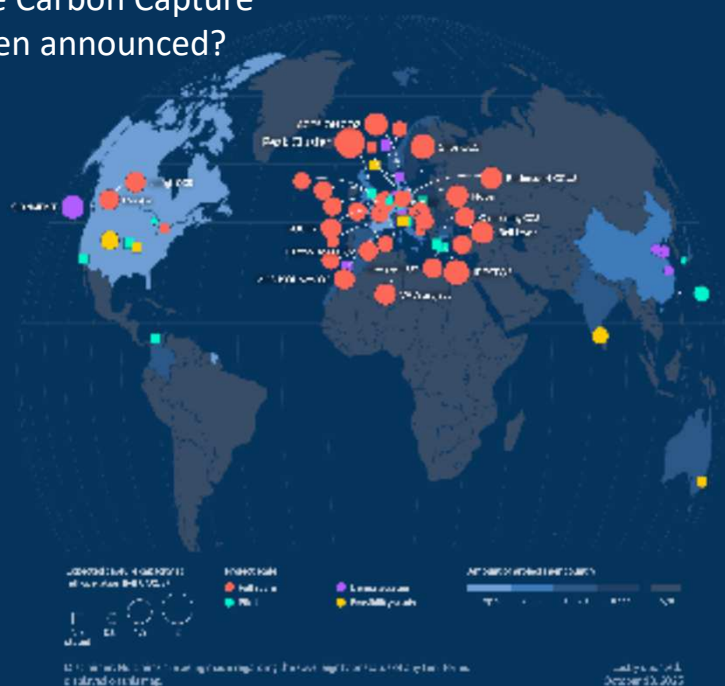
22%

Reduction in fossil fuel consumption (1990 baseline)

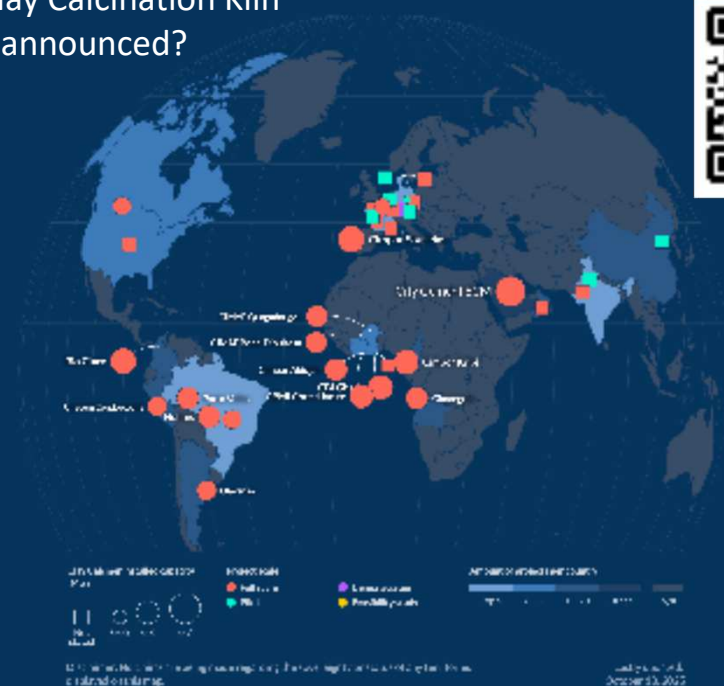
* Note figures are rounded. Please refer to GCCA website for exact figures and comparisons and full GNR database.

Green Cement Technology Tracker

Where have Carbon Capture
projects been announced?



Where have Clay Calcination Kiln
projects been announced?





Global Cement and Concrete
Association

Cement & Concrete Industry Net Zero Action & Progress Report 2025/26

An update of global action and progress
of the GCCA and its member companies -
as we advance on our net zero journey.

**ACTION &
PROGRESS**



60 plus case studies for members
across world on a range of
decarbonisation and sustainability
projects

Summary of 2025 Progress

Completed in 2025

- Argentina
- India
- Indonesia
- Morocco
- Tanzania

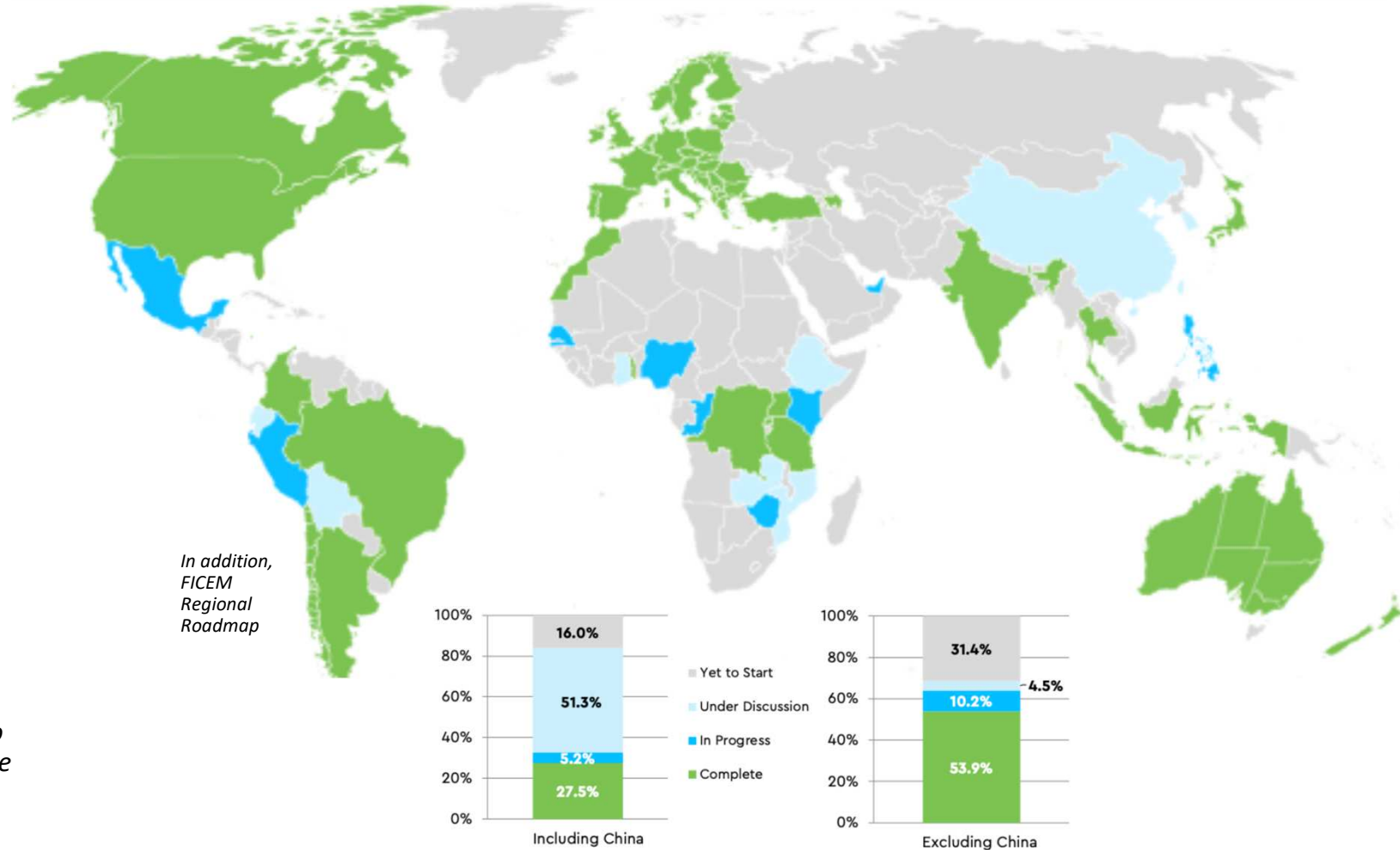
In Progress

- Kenya
- Peru
- Philippines
- Senegal
- Zimbabwe

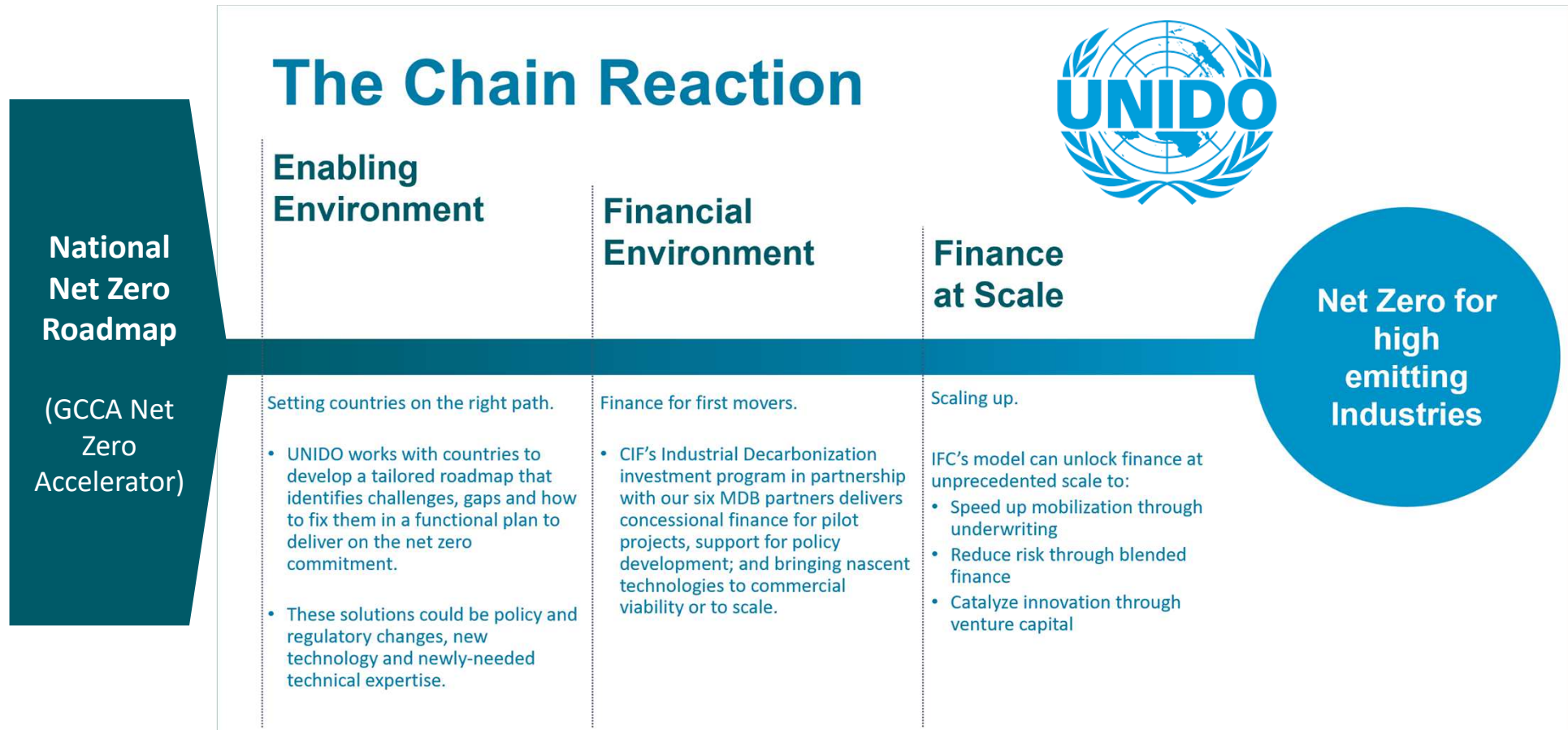
Under Discussion

- Ethiopia (COP host in 2027)

Note* Uganda, Rwanda, Togo, Congo Brazzaville → **Complete (but will not be published)*



UNIDO chain reaction: a vision for finance mobilisation on climate transition



Cement Industry signed unique partnership with UNIDO to drive industry decarbonisation around the globe

JUNE 2024 – UNIDO / GCCA MOU



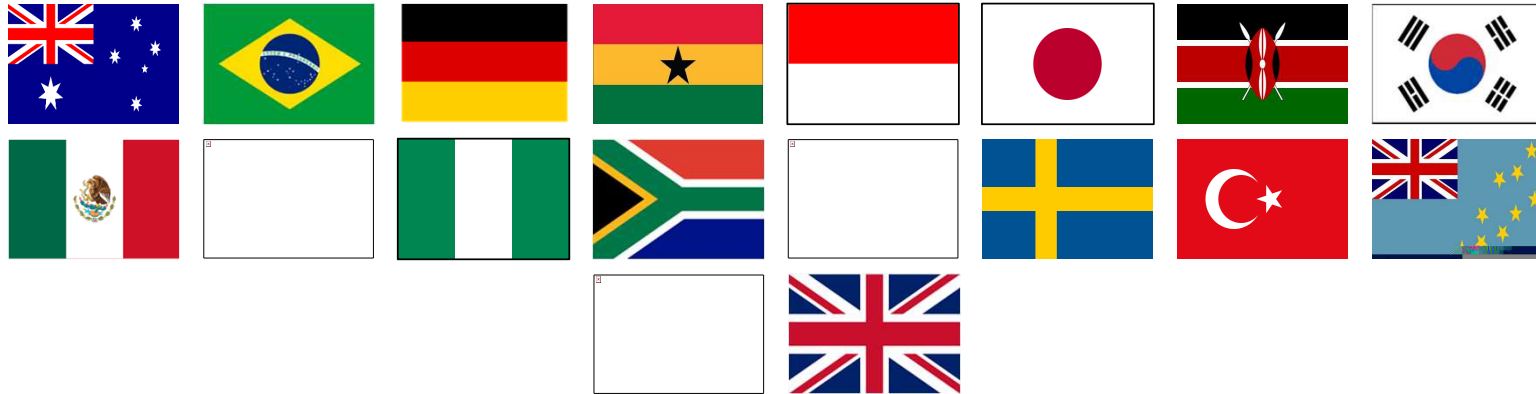
The partnership agreement includes pledges to provide **recommendations and financial support to create the right market environments** for the development of low and near zero emissions cement and concrete

April 2026 – UNIDO / FICEM common declaration

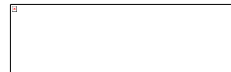


The Belém Declaration on Global Green Industrialization

Supporters as of 12 March 2026



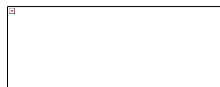
UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION



climateimperative



worldsteel
ASSOCIATION



Industry, Infrastructures, and Innovation
for Strategic Transformation



IPC | ISTANBUL POLICY CENTER
SABANCI UNIVERSITY
STIFTUNG MERCATOR INITIATIVE

Our key policy requirements

We call on governments and policymakers to support us across these five key policy areas:

01. Supplementary Materials
02. Low Carbon Procurement
03. Waste Treatment in Cement Kilns
04. Carbon Pricing
05. Carbon Capture Use and Storage



European Bank
for Reconstruction and Development



The Federal Government



Financing Opportunities Latest developments

IKI:

- **IKI** launched call for project focussing on Cement in Africa and South-East Asia
- GCCA is leading a proposal focusing on Africa – Nigeria, Senegal, Ethiopia.
- Partnership with UNIDO, DENA, CPI, LC3/EPFL

GEF:

- **GEF** granted 3 m USD to UNIDO to develop a concept to address Industrial decarbonisation in cement sector. First time ever GEF gives grants on single sector.
- GCCA is prime partner in development of concept, however proposal **will need to respect GEF specificities**.
- **Project outcome 1:** demonstration of implementation of “Chain Reaction” in 2 countries in 2026. Focus countries will be **Colombia and Kenya**
- **Project outcome 2:** if successful GEF will give a second grant of 50+ mUSD for implementation in 5 countries

Roadmap support:

- Roadmap finalised in **ARG with Climate Club**
- RM started in **Philippines with Canada/UNIDO** and **Kenya with Net Zero Partnership**
- Next RM (under discussion) **MEX, PERU, Other African countries**

Climate Work Sponsorship:

- Foundational project on Calcined Clay Cement development and compatibility with ITMOs / Art 6 Carbon market system **in Global South**

MAF Submission:

- Second submission for MAF in Vietnam ongoing
- 2026 MAF in Thailand (with UNIDO), Kenya and India (GCCA lead with Teri)

CCUS

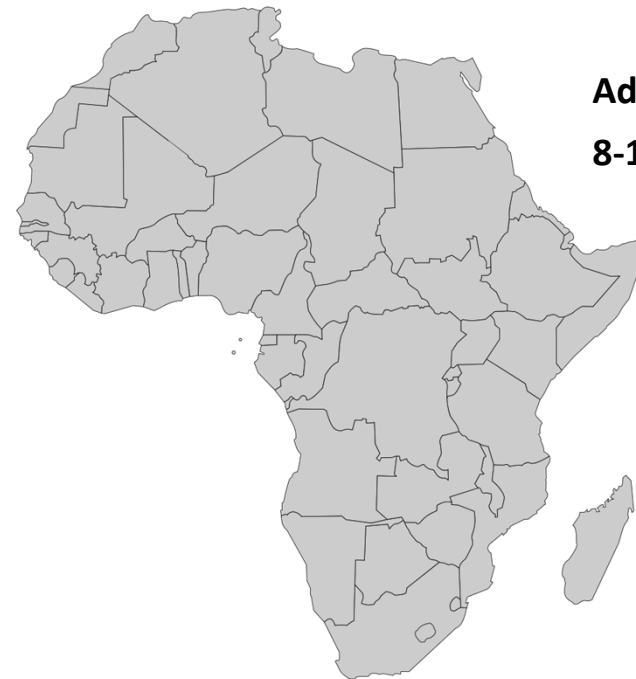
- CCUS carbon value chain assessment to be conducted in 3 countries.
- Project scope under elaboration

Two regional Dialogues

First of a kind dialogue where National regulator and industry meet to explore industrial decarbonization solution and actions in cement sector



Santiago, Chile
12-14 May



Addis Ababa
8-10 July



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**Action &
Progress Report**