

# THE CEMENT INDUSTRY ACTION AGENDA



## First year implementation report

2006-07



Australian Government  
Department of Industry,  
Tourism and Resources



**CEMENT INDUSTRY  
FEDERATION**



The Hon Bob Baldwin MP  
Parliamentary Secretary to the  
Minister for Industry, Tourism and Resources  
Parliament House  
Canberra ACT 2600

cc.  
The Hon Ian Macfarlane, MP  
Minister for Industry, Tourism and Resources  
Parliament House  
Canberra ACT 2600

Dear Parliamentary Secretary

We are pleased to present to you the attached report outlining progress for the first year on the implementation of the Cement Industry action agenda.

The Cement Industry action agenda was launched by the Hon Bob Baldwin, MP Parliamentary Secretary for Industry, Tourism and Resources on 26 June 2006. Initial work included the establishment of the Implementation Group to oversee work on the agenda along with the working groups charged with undertaking the seven recommendations and 54 pathways flowing from the Agenda. Since the initial establishment there have been a number of changes in the composition of the Implementation Group and the five working groups. The aim of the changes was to ensure the most appropriate industry and government representation on the Implementation Group to facilitate oversight of the action agenda and the attainment of its goals.

The report notes the progress that has been made over the past year in actioning the action agenda. Highlights have included the work to transform the human resource management strategies within the cement industry and engagement with the Department of Education, Science and Training to ensure a sustainable skill base for the industry into the future; the establishment of the Energy Market Reform Working Group and its work around gaining a greater voice in the energy reform process and maximising potential benefits for industry; work to establish a pilot driver training program to deliver greenhouse and efficiency dividends to the industry; and work to enhance industry representation within Australia's anti-dumping regime.

For industry, a highlight has been the release of the report of the Prime Minister's Task Group on emissions trading. The cement industry was pleased to note the report was broadly in line with the submission from the Cement Industry Federation to the Task Group. The task for industry is now to work with government to develop a practical and cost effective trading scheme which will contribute to reducing the industry greenhouse foot print while ensuring its continued economic viability and competitiveness with imported product.

Finally the report notes the parallel work being done within the Asia Pacific Partnership for Clean Development and Climate through the Cement Task Force and the projects which are of direct relevance to the Australian Industry. This is enabling international exposure for the industry at a time of increasing global competition in the cement industry, both showcasing the strengths of the Australian industry and facilitating industry access to best practice technology from overseas.

We would like to thank all colleagues on the Implementation Group and the many industry and government contributors to the working groups for their support to-date and to encourage them to continue to work to ensure that the outcomes envisaged in the action agenda are achieved. It is pleasing to note that the linkages made between industry and government through the action agenda will continue as a vehicle for raising and resolving issues into the future.

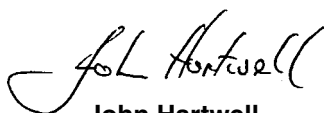
We commend this report to you.

Yours sincerely



**Chris Leon**

Co-Chair Cement Industry Action Agenda  
Chief Executive Officer  
Cement Australia



**John Hartwell**

Co-Chair Cement Industry Action Agenda  
Head of Division—Resources  
Department of Industry, Tourism and Resources

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# Section 1: Overview

## Background

The purpose of the Cement Industry Action Agenda is to put in place the strategies and processes to realise the vision of the cement industry. The agenda encapsulates the challenges facing our industry which in many ways are a microcosm of the same challenges facing all of Australian industry namely: ensuring sustainability in a carbon constrained future, having an appropriately skilled and motivated workforce, an efficient logistics system and a competitive industry in a globalised economy.

The development of the Agenda was announced by the Hon Ian Macfarlane MP, Minister for Industry, Tourism and Resources (DITR) on 25 August 2004. The Minister invited a group of industry leaders and senior government representatives to lead the development of the action agenda.

The first meeting of the Strategic Industry Leadership Group (SILG) was on 22 March 2005 chaired by Mr Malcolm Irving AM. The SILG met a further three times during 2005 to complete the development of the agenda.

The seven recommendations and their pathways for achievement from the report were finalised and transmitted to the Minister in May 2006. The Agenda was formally launched by the Hon Bob Baldwin MP, Parliamentary Secretary for Industry, Tourism and Resources on 27 June 2006.

## Actioning the action agenda

The first meeting of the Implementation Group occurred concurrent with the launch of the agenda. The Minister invited Mr Chris Leon of Cement Australia to co-chair the group along with Mr John Hartwell of DITR.

Initially four working groups were established to implement the recommendations of the agenda. A fifth group was added in response to an explicit pathway within the agenda to gain an understanding of the complicated issue of energy market reform.

The first year of the agenda coincided with the initiation of the Asia Pacific Partnership on Clean Development and Climate. Cement is represented as one of the eight task forces established to progress this international initiative. The Australian cement industry is a key contributor to the success of this significant government/industry partnership. Much early effort was expended to ensure the successful establishment of the Cement Task Force and to progress the key Australian initiated projects,

- ‘Cement Centre of Excellence’
- the co-generation of electricity within the cement industry
- trialling alternative fuels in the operation of cement kilns.

These projects all have important inter-relationships with the Cement Industry Action Agenda and facilitate industry participation in international partnerships and innovation in a way not anticipated at the time of the development of the agenda.

The following chart indicates the responsibility structure of the action agenda with the members of the Implementation Group and working groups on the following page.

## Industry vision

“To maintain a world class, internationally competitive

Australian cement industry positioned

to take advantage

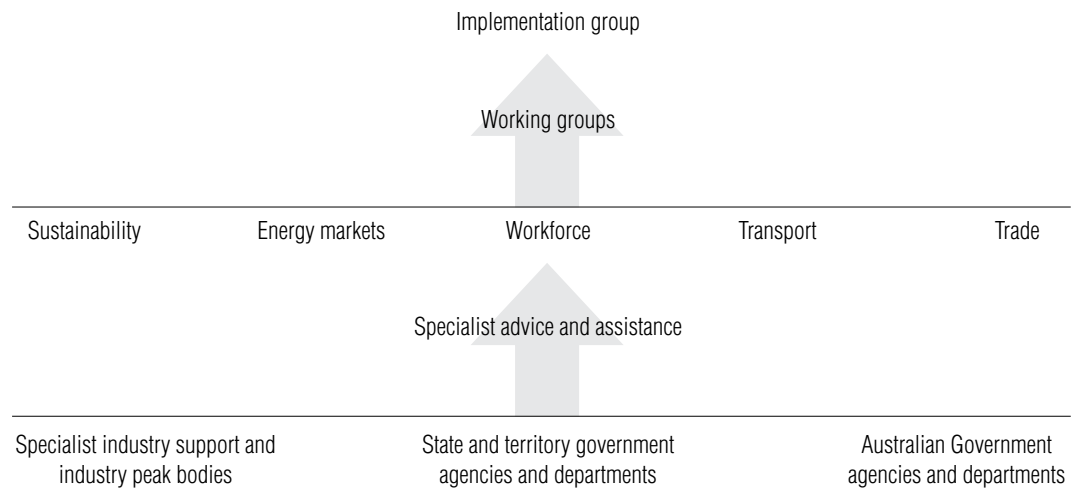
of emerging market opportunities,

endorsed by a

community license

to operate.”

## Action agenda implementation structure



## Action agenda responsibilities

### Implementation Group

|   |  |
|---|--|
| <b>Mr Chris Leon</b><br>Co Chair                                  | Managing Director and Chief Executive,<br>Cement Australia   |
| <b>Mr John Hartwell</b><br>Co Chair                               | Head of Division—Resources<br>Department of Industry, Tourism and Resources                              |
| <b>Ms Ros DeGaris</b><br>(Chair Sustainability Working Group)     | Group Sustainability Manager<br>Adelaide Brighton Pty Ltd  |
| <b>Mr Michael Williams</b><br>(Chair Energy Market Working Group) | Manager Angaston Operations & Northern Cement,<br>Adelaide Brighton Pty Ltd                              |
| <b>Mr Wayne Beel</b><br>(Chair Work Force Working Group)          | General Manager Human Resources & Business Improvement<br>Cement Australia                               |
| <b>Mr Peter Klose</b><br>(Chair Transport Working Group)          | Strategy Manager Major Projects Corporate<br>Cement Australia  |
| <b>Mrs Robyn Bain</b><br>(Chair Trade Working Group)              | Chief Executive Officer<br>Cement Industry Federation  |
| <b>Ms Lynden Ayliffe</b>  | Assistant Secretary Environment Standards Branch, Department of Environment and Water                    |
| <b>Mr Craig Heidrich</b>  | Executive Director<br>Australasian Slag Association and Ash Development Association of Australia         |
| <b>Ms Margaret Sewell</b>   | General Manager Projects & Taxation, Resources Division<br>Department of Industry, Tourism and Resources |

## Sustainability Working Group

|  |  |
|--|--|
| <b>Ms Ros DeGaris</b> Chair                                  | Adelaide Brighton Pty Ltd  |
| <b>Mr Grant Williams</b>                                     | Blue Circle Southern Cement  |
| <b>Mr Brian McGrath</b>                                      | Blue Circle Southern Cement  |
| <b>Mr Joseph Mazzone</b>                                     | Adelaide Brighton Pty Ltd  |
| <b>Mr Michael Jones</b>                                      | Adelaide Brighton Pty Ltd  |
| <b>Mr Stuart Ritchie</b>                                     | Cement Australia   |
| <b>Mr Paul Bainton</b> and other representatives as required | Department of the Environment and Water Resources and the Australian Greenhouse Office |

## Energy Market Reform Working Group

|                                       |  |
|---------------------------------------|--|
| <b>Mr Michael Williams</b> Chair      | Adelaide Brighton Pty Ltd              |
| <b>Mr Dan Taylor</b>                  | Cement Australia                       |
| <b>Mr Barry George</b>                | Blue Circle Southern Cement            |
| <b>Mr David Headbury / Mr Bob Lim</b> | Major Energy Users Group               |
| <b>Ms Naomi Brown</b>                 | Cement Industry Federation             |
| Representatives as required           | Energy and Environment Division / DITR |

## Workforce Working Group

|                             |  |
|-----------------------------|--|
| <b>Mr Wayne Beel</b> Chair  | Cement Australia   |
| <b>Mr Stuart Waldon</b>     | Blue Circle Southern Cement  |
| <b>Ms Sam Toppenburg</b>    | Adelaide Brighton Pty Ltd  |
| <b>Mrs Robyn Bain</b>       | Cement Industry Federation   |
| <b>Ms Naomi Brown</b>       | Cement Industry Federation   |
| <b>Mr Paul Beerworth</b>    | Department of Education, Science and Training                                |
| <b>Mr Alan Neate</b>        | Department of Transport and Regional Services (Area Consultative Committees) |
| Representatives as required | Department of Employment and Workplace Relations                             |

## Transport Working Group

|                             |   |
|-----------------------------|---|
| <b>Mr Peter Klose</b> Chair | Cement Australia                              |
| <b>Ms Naomi Brown</b>       | Cement Industry Federation                    |
| <b>Mr Ian Duncan</b>        | Blue Circle Southern Cement                   |
| <b>Mr Michael Harper</b>    | Adelaide Brighton Pty Ltd                     |
| <b>Mr Duncan Loydell</b>    | Australian Trucking Association               |
| <b>Mr John Turton</b>       | Cement, Concrete and Aggregates Australia     |
| <b>Mr Geoff Johnston</b>    | Department of Transport and Regional Services |

## Trade Working Group

|                             |                            |                             |  |
|-----------------------------|----------------------------|-----------------------------|--|
| <b>Mrs Robyn Bain</b> Chair | Cement Industry Federation | Representatives as required | Australian Customs Service / Department of Foreign Affairs and Trade |
|-----------------------------|----------------------------|-----------------------------|--|



## Recommendations

The action agenda made seven key recommendations which reflected the issues which emerged during the development phase of the agenda. These are:

- 1 The Australian Government support industry collaboration on R&D, and ensure current and new assistance programs are accessible by, and relevant to, the industry.
- 2 Future emissions management measures continue to acknowledge the impacts on energy intensive industry.
- 3 The Australian Government, in consultation with industry, state and territory governments consider the scope to enhance the uptake of alternatives to fossil fuels, secondary materials and supplementary cementitious materials.
- 4 The cement industry work with the Australian Government to address the skills shortages that threaten the sustainability of the industry.
- 5 The Cement Industry Federation support workplace relations reform and work closely with the Australian Government to explore opportunities to increase workplace productivity, flexibility and efficiencies, appropriate to its business model.
- 6 The Australian Government work with the National Transport Commission and state, territory and local governments to promote policy and transport infrastructure solutions aimed at delivering a more integrated and efficient transport network.
- 7 The Australian Government provide effective access to, and timely decisions under, the anti-dumping and countervailing regime.

## Implementation plan

The Cement Industry Action Agenda proposes 54 pathways for ensuring the implementation of seven recommendations. Early in the life of the action agenda, a decision was taken to prioritise the Pathways to first address those which most directly would have a positive outcome for the cement industry. This resulted in some 30 Pathways being identified as the top priorities for the action agenda.

These priorities focus on the following areas of work:

- Government and industry working to increase the uptake of alternative fuels and materials including ensuring that government assistance programs address this issue
- Government and industry working on a nationally consistent waste policy including waste stream utilisation and encourage government to establish a single, national emissions reporting system.
- Deliver the industry technology pathway consistent with business as usual models and to reduce GHG emission using strategies outlined in the action agenda.
- Industry to form an Energy Market Working Group to ensure that industry becomes more aware and participatory in the energy reform process.
- Government and industry to participate in the Asia Pacific Partnership on Clean Development and Climate and collaborate on appropriate initiatives.
- Government and industry working to ensure that workplace efficiency measures are maximised and that internal company human resource management strategies are effective.
- Government and industry working to ensure that road, rail and shipping efficiencies are maximised.



## First year achievements

A prime initial focus of the working groups has been to re-engage with government—state and Commonwealth, to progress the recommendations of the action agenda. This has included organising a number of tours of cement industry infrastructure to demonstrate to government representatives the real issues ‘on the ground’ that are facing the industry.

A positive experience of the first year for the working groups has been gaining a greater understanding of the importance (and occasional difficulty) of the interconnectedness of government and the differences in responsibility and operational approaches between the Commonwealth, states, territories and local governments. This will assist in moving elements of the action agenda forward though engaging with the right areas of government, with the right issues at the right forums.

It is noteworthy that the action agenda process is seen as a model of cooperation between government and industry. The Cement Industry Action Agenda is accessed and downloaded more than 130 times per week from the Cement Industry Federation website with additional downloads from the DITR site—this is over one year after the release of the document.

The main achievements flowing from each of the working groups under the action agenda in the first year of implementation include the following:

### Sustainability

#### COMMENTS FROM THE CHAIR:

#### MS ROS DEGARIS, GROUP SUSTAINABILITY MANAGER ADELAIDE BRIGHTON

*“The Sustainability working group has a broad set of recommendations. In 2004, the CIF undertook a forward looking assessment of technology from now to 2012 — one of the tasks of our group is to find ways to encourage the adoption of technologies that provide sustainability benefits for the industry. Through the CIF we are participating in the AP6 program with three sustainability initiatives being progressed.”*

*“We are focused on energy and greenhouse efficiency projects including streamlined greenhouse reporting; the uptake of alternative fuels and raw materials — exploring ways to lower greenhouse gas (GHG) intensity in our products; and encouraging supplementary cementitious materials (SCM) usage which can also have a significant impact on greenhouse emissions and energy efficiency.*

*“We’re keen to work with governments to improve regulatory approaches to our industry, particularly in the areas of resource recovery, technical improvements and to see the inclusion of full life-cycle assessments in building efficiency codes.”*

#### Key outcomes:

- Access to AP6 funding
- Extension of Alternative fuels and raw materials programs by members
- Review of progress Technology Pathway 2005–2012
- National GHG and Energy Reporting tool to be legislated 2007 (OSCAR)
- Reporting to WBCSD CSI protocol for GHG to AP6 and Greenhouse Challenge Plus
- Registration of all CIF member to Energy Efficiency Opportunities and roll out of assessment process
- Engagement of the industry associations (CCAAA, ASA, ADAA) to increase use of SCM in concrete
- Increase in waste levy in four states in 2007



- Submissions to Productivity Commission on Waste, participation in the Product Stewardship Program for Used Tyres
- Company promotion of alternative fuels and raw materials program through awards, magazine articles and presentations

The goals of the Sustainability Working Group are to maximise the uptake of world's best practice technology by 2012, having regard to local and global environmental and economic factors, to increase fuel efficiency and reduce greenhouse emissions by 2012 in line with the goals identified in the Technology Pathway Report and to increase the uptake of alternative fuels to fossil fuels, secondary materials and supplementary cementitious materials by 2012 to meet or exceed the quantities identified in the Technology Pathway Report.

Participation in the AP6 program has enabled three innovative projects to be progressed. Co-generation of power using process waste heat, development of alternative fuel for cement kilns from industrial waste streams, and the development of biomass fuel from sewage sludge. Other projects include the extension of biomass fuel and use of low GHG raw materials.

The Cement Industry Federation is working with companies to complete the 2007 industry survey with the GHG inventory calculated using the World Business Council for Sustainable Development protocols. Data from this survey demonstrates industry progress in meeting its commitments to reduce greenhouse gas (GHG) emissions and improve overall energy efficiency which are explicit goals of the action agenda.

DITR provided sponsorship to the Australasian Slag (Iron and Steel) Association — Sustainability & Slag Conference 2007 to directly support the implementation of the action agenda. The particular aim of the sponsorship was to run a workshop to identify regulatory and legislative barriers to the use of co-products such as slag, and to promote the potential life-cycle and GHG benefits of utilising alternative materials. The workshop noted the divergences in approaches to waste / co-product management from state governments and is flagging the opportunity of a multi-industry approach to state and Commonwealth governments to achieve reform in this area.

The Department of the Environment and Water Resources provided sponsorship to the Waste Management Association of Australia for its 'Energy from Waste' conference held in July 2007. The conference explored sustainable energy recovery from waste and biomass in light of carbon constraints.

#### **Future focus:**

- Work with government to enhance access to funding schemes
- Work with government on single, national GHG and energy reporting system
- Work with the AGO to develop GHG factors for alternative materials.
- Work with governments on the recommendations of the Productivity Commission on Waste to enhance the use of co-products
- Work with government on the promotion of innovative technology and use of alternative fuels and materials
- Support CCAAA, ASA and ADAA actions to increase SCM use and mineral addition
- Promote the actions of the CIF members towards a sustainable industry
- Extend alternative fuels and raw material programs in cement manufacturing
- Work with state governments on waste policy that embraces resource recovery principles
- Review Technology Pathway review and report the industry's progress

The industry will utilise the CIF Industry Survey and the Technology Pathway information to monitor and progress opportunities for technology advancement and the development of the further use of alternative materials.

The progress of the AP6 program will establish demonstration technology in Australia, and involvement will assist in developing government and industry partnership to encourage innovation.

Developing common specific issues around policy and the regulation of waste is a further step towards promoting alternative materials use and encouraging responsible utilisation of these resources. While national harmonisation is recognised as a challenging objective, there is some common understanding of the principles of resource recovery albeit that each state has a different approach to the issue. There is much yet to be done to change the traditional way of waste disposal to a sustainable approach of waste re-use.

## Energy Market Reform

COMMENTS FROM THE CHAIR: **MICHAEL WILLIAMS, MANAGER ANGASTON OPERATIONS AND NORTHERN CEMENT, ADELAIDE BRIGHTON LIMITED**

*“The Energy Market Reform Working Group was established to make the industry aware of opportunities to monitor, comment on and participate in energy regulatory rule making processes with the major issues being: price; supply; long term supply assurance and sustainability; access and the ability to sell electricity to the grid.”*

*“To assist us in addressing these issues, the CIF become a member of the Major Energy Users Association (MEU) which represents large users in the market reform process as well as monitoring the operation of the market. Government representatives have also provided background on the reform process to the working group and have benefited from cement plant familiarisation visits.”*

### Key outcomes

- Establishment of the working group
- Tour of the cement industry and energy trading with government representatives
- Engagement of the major energy users groups as the vehicle for industry representation

The establishment of the Energy Market Reform Working Group was one of the priority actions of the Sustainability Working Group and reflects a recognition of the complexity and specialist attention that the energy market reform process requires.

An early action of the group was to engage with the Department of Industry, Tourism and Resources as the government agency providing advice to government on the reform process. The industry provided a tour of the cement industry which highlighted energy issues, the impact of the reform process on the industry and how the industry is maximising the benefits of the reform process.

To facilitate industry participation and understanding of the energy reform process the Cement Industry Federation has engaged the services of the MEU to provide a conduit for information on energy reform back to the working group and to represent the interests of industry in the reform process.

The Energy Market Reform Working Group has significantly increased the industry’s understanding and awareness of the reform processes and through the MEU, developed the mechanisms for commenting on those processes.

**Future focus:**

- Establish, where practical, linkages with major energy users in Tasmania, Northern Territory and Western Australia to lobby for effective energy market reform.
- Utilising the services of the MEU to enhance representation in the energy reform process.

A key issue which has emerged in the energy reform process is the perception that major energy users such as the cement industry are not recognised as key players in the development of the national energy market. The focus of the group will therefore be firmly on ensuring an industry voice in the difficult and complex arena of energy reform particularly as we move to the next stage of reform with the establishment of the National Energy Market Operator.

**Work force**

COMMENTS FROM THE CHAIR: **WAYNE BEEL, GENERAL MANAGER — HUMAN RESOURCES AND BUSINESS IMPROVEMENT, CEMENT AUSTRALIA**

*“The Workforce Working Group was established firstly to position the cement industry as capable of working with the Australian Government to address skills shortages that threaten the sustainability of the industry and secondly, to support workforce relations reform providing opportunities to increase workplace productivity, flexibility and efficiencies.”*

*“The working group has been able to quickly establish a framework of initiatives throughout all three companies including an increased focus on recruitment as a core activity of our managerial teams; and the introduction of a fresh set of marketing activities to promote not only the industry but also the communities in which the industry operates.”*

*“The working group approach has enabled the individual companies to share solutions and insights to both the skills shortage and workplace productivity aims that has reduced both discovery, development and implementation costs associated with initiatives undertaken by the individual companies.”*

**Key outcomes**

- Engagement with the Department of Education Science and Training in the Strategic National Initiatives Project
- Redevelopment of industry workforce management strategies
- Redesign of industry work practices

The action agenda recognised that securing the future workforce of the cement industry was a key issue. The goals of the working group are to assist the industry to prepare now for future skill needs and to continue to work closely with government to maximise opportunities stemming from workplace relations reforms, with special emphasis on those elements which support capital-intensive operations that operate a continuous production cycle. The Workforce Working Group has been working on a number of key strategies to meet the recommendation of the action agenda.

The three major Australian cement companies have quickly responded to the industry and broader skills shortage issues by undertaking a number of fresh initiatives. The industry has undergone a substantial revision of its internal human resource management strategies to ensure that the existing workforce is appropriately skilled and actively involved in the changing work environments of the cement industry. This includes an increased focus on recruitment and retention strategies. This has included a more focussed approach to graduate recruitment and plugging into skilled recruitment road shows overseas.

The industry is working closely with the Department of Education, Science and Training as part of a programme to undertake a Strategic National Initiatives (SNI) project to build alliances

between employers within the resource, infrastructure and agriculture industry sectors in order to develop structured career pathways within these sectors.

The project will evaluate the potential career pathways in a range of skills and competencies in occupations across the sectors and with local government to provide long term structured, mobile, career opportunities for people engaged in the affected occupations across Australia.

There is also a focus on recruitment from the local community who will provide a sustainable and motivated workforce into the future. A project which reflects this focus is the development and production of a cement industry DVD for local school audiences where the cement industry operates to demonstrate the important role that the industry plays in these communities and the career paths which it offers.

The industry is also working with the Department of Employment and Workplace Relations on a timeframe to enable the industry to become compliant with the National Code of Practice for the Construction Industry.

#### Future focus:

- To complete an educational DVD on the industry for use in schools (especially schools local to cement plant locations)
- Work with Area Consultative Committees to enhance involvement in local communities and address soft infrastructure issues.
- Development and implementation of a Cement Industry “Diversity Strategy”

The Workforce Working Group is working to complete packages to enhance recruitment strategies for the industry particularly targeting the future workforces in the schools and communities which are local to major cement plants and operations. The group will also enhance links with, and to contribute to building, sustainable local communities through the area consultative committees network and through participating in the Local Government Management Authority.

In recognition of the changing nature of the workforce and of the largely untapped potential workforce in local communities, the group will develop a diversity strategy to assist the industry recruit, train and retain women in its workforce. The group will also continue to work closely with the Department of Education Science and Training on the SNI project

## Transport

### COMMENTS FROM THE CHAIR: PETER KLOSE, STRATEGY MANAGER — MAJOR PROJECTS CORPORATE, CEMENT AUSTRALIA

*“Cement plants are primarily a regionally based industry relying heavily on road transport to deliver product to and from facilities, often over long distances. The action agenda identified a clear objective to reduce reliance on, and increase the efficiency of, road transport and to actively encourage increased use of rail and shipping to transport product.”*

*“Identified issues include a national approach to Heavy Mass Limits; increased costs but lower investment in road, rail and shipping infrastructure; and rail and shipping reliability and timetabling.”*



*“The Transport working group includes representatives from the Australian Trucking Association, the Australian Government and the cement industry. Achievements to date have included the separation of ownership of rail track and rail rolling stock in Tasmania; and undertaking an industry tour to better inform members of the issues. We hope to continue to develop relationships with governments, and to establish improved processes and lines of communications with all stakeholders.”*

#### **Key outcomes**

- Engagement with the Department of Transport and Regional Services and an industry tour for government representatives demonstrating transport issues on the ground.
- Engagement with the Australian Trucking Association and the Cement, Concrete and Aggregates Association of Australia.
- Pilot driver training project.

The goal of the Transport Working Group is to reduce the use of road vehicles to transport product by transferring greater freight loads to bulk rail and sea transport where it is efficient to do so. The working group is also contributing to improving the environmental efficiency of the industry.

Initial efforts of the working group have been focussed on identifying specific concerns for the individual companies and then engaging with all levels of government, Commonwealth, State and local—to gain action on those issues. Engaging with the Australian Transport Council is a priority for the group. An effective strategy is to present these issues “on the ground” to vividly demonstrate how issues around inconsistent heavy mass limits, “gaps” in the road network, rail service unpredictability and the duplication within the marine voyage permit system affect the industry.

The Transport Working Group, in conjunction with the Sustainability Working Group, has developed an application to access Sustainability Victoria funding to undertake a driver training program. The industry will provide vehicles and drivers to undertake the pilot scheme. The aim of the program is to change driver behaviour to realise lower fuel usage commensurate greenhouse gas emission savings along with a range of other benefits including lower maintenance costs, improved logistics management and improved driver awareness. On its completion, the pilot will be assessed for its extension to the rest of the transport sector of the cement industry.

#### **Future focus:**

- Continue to support the creation of standard consistent HML network for Australia.
- Submission to the National Transport Commission on Heavy Vehicle Charges.
- Engage with state rail authorities to progress improvements in rail service and infrastructure.
- Engage with relevant State Government Transport Departments and Port Authorities to address industry concerns on berthing and infrastructure issues.

The group is preparing a submission to the National Transport Commission (NTC) on the draft Heavy Vehicle Charges Determination for 2007 which will highlight industry concerns on increasing charges on a class of transport (B Doubles) which is delivering substantial benefits in terms of productivity improvements, safety and environmental benefits. This also links in with highlighting continuing gaps in the B Double network and the resulting cost and operational imposts on industry.

The Transport Working Group will also follow-up on the rail and port issues identified to-date with the relevant state, territory and local government areas and with port authorities. The aim is to assist these levels of government to address the specific issues relevant to the industry around rail, road and shipping and to inform and influence decisions of the Australian Council on Transport and the Auslink process where appropriate.

## Trade

### COMMENTS FROM THE CHAIR: ROBYN BAIN, CHIEF EXECUTIVE OFFICER, CEMENT INDUSTRY FEDERATION

*“Having been intimately involved with the action agenda from inception to implementation, the key issue has been engaging creatively and effectively with government. The Trade Working Group has found involvement in the Trade Remedies Task Force a particularly effective mechanism for gaining a voice for the cement industry in progressing the trade-related pathways of the action agenda.”*

*“In meeting the challenges of a globalised economy has been to ensure that the Australian cement industry is on a level playing field with imports of cement and clinker. Working with the Australian Customs Service on reforms to the anti-dumping regime is an important component of ensuring our industry remains competitive.”*

#### Key outcomes

- Input on updating the Australian Customs Manual.
- The provision of up-to-date data on the import of clinker and cement product in support of the anti-dumping regime.

The action agenda issues related to trade and in particular the provisions around anti-dumping are being managed through the Cement Industry Federation. The Federation is fully engaged with the Australian Customs Service through the Trade Remedies Task Force and participated in the Joint Study into the administration of Australia’s anti-dumping system. The industry is particularly concerned that there is transparency both in terms of the decision making and assessment process once an application has been made and in obtaining relevant data and information on which to base applications.

The Industry also believes that it is vital that the Australian Customs Service ensures that it has the expertise and experienced required to enable it to reach informed decisions in anti-dumping applications which are often complex, ambiguous and difficult to clearly define.

It is pleasing to note that Customs is actioning most of the recommendations of the Joint Study including improving industry liaison functions and the out posting of Customs Officers in key Australian trading partner economies.

#### Future focus:

- Participate in review of Material Injury Guidelines
- Participate in review of Customs manuals
- Continue to be active members of the Trade Remedies Task Force and to provide accurate data to facilitate necessary trade actions.



## Section 2: Pathway Progress

### Progress on recommendations<sup>1</sup>

The following elements provide detail on progress for each of the pathways included in the action agenda. As already outlined in this report, five working groups have been established to progress each pathway.

#### Sustainability Working Group

##### Pathway 1

Work with industry to promote R&D partnerships across industries to increase uptake of alternative fuels and materials. (G)

**Actions** The Department of the Environment and Water Resources (DEW) contributed \$50,000 to the Commonwealth Scientific and Industrial Research Organisation to develop an alternative fuels calculator to assist in assessing environmental benefits and costs of alternative transport fuels.

The CSIRO Ready Reckoner project is nearing completion. The Ready Reckoner will include a series of stand alone web pages that allow for comparison of fuels in terms of greenhouse gas emissions, fuel usage and safety issues. A dynamic version of the Ready Reckoner hosted on the CSIRO website will be available to the general public at the beginning of 2008.

DEW sponsored the Waste Management Association of Australia's National Energy from Waste Conference 2007. The conference explored sustainable energy recovery from waste and biomass in light of carbon constraints.

As noted—projects within the Asia Pacific Partnership for Clean Development and Climate will directly assist in achieving the goal related to this Pathway.

**Status** Ongoing

##### Pathway 2

In developing relevant programs or in reviews of existing programs consider whether criteria should include waste management and substitution by recycled materials. (G)

**Action** Details of funding programs and grants assistance have been provided to CIF. The CIF has met with the Commonwealth Government (DITR and DEW) and with Sustainability Victoria to discuss what programs are suitable for industry to access with feedback being supplied on the application process and other requirements.

Industry is reviewing criteria of funding opportunities to identify sticking points in applications.

**Status** Ongoing

<sup>1</sup> (G) Government action (I) Industry undertaking



### Pathway 3

Ensure that eligibility criteria for assistance programs stimulate innovation that delivers environmental and social benefits and positive spill-over for the economy. (G)

**Action** The government announced in May 2007 in the Industry Statement an extension of tax concessions for R&D which may be of assistance to the industry.

DITR met with industry representatives to discuss and explain criteria around government funding programs. Industry is preparing a number of potential projects for submission in appropriate grant categories.

**Status** Ongoing

### Pathway 4

Continuing to seek out and implement incremental technological advances consistent with Business As Usual (BAU) developments. (I)

**Action** The industry is actively implementing changes in technology and processes to reduce GHG emissions and improve energy efficiency along the pathways identified and measured in the Technology Pathway Report. The results of the 2006/07 CIF survey and the update report of the Technology Pathway are being prepared.

**Status** Ongoing

### Pathway 5

Driving the industry towards World Best Practice technologies by developing a technology strategy that encourages further investment in R&D and new technologies. The strategy will map out how the industry can:

- Maintain an innovative outlook by promoting the benefits of R&D
- Identify demonstration sites to drive the testing and commercialisation of new product and process technologies for potential industry-wide benefit
- Seek opportunities to facilitate collaborative R&D to develop and apply 'frontier technologies' such as geosequestration and cogeneration. (I)

**Action** Under the AP6 banner, industry and government in partnership have identified best available technology projects to promote the use of frontier technology and to demonstrate flagship projects.

The Technology Pathway Report for the industry is being updated on the progress of emerging technologies for cement manufacturing.

**Status** Ongoing



**Pathway 6**

Australian and state governments to work cooperatively to establish a single, national, emissions reporting system. (G)

**Action** The Prime Minister announced on 17 July 2007 that the Australian Government would introduce legislation this year to provide for a comprehensive and streamlined national emissions and energy reporting system to underpin the introduction of emissions trading. This will give effect to the decision of the Council of Australian Governments (COAG) which on 13 April 2007 agreed to establish a mandatory national reporting system, with detailed design to be settled after the report by the Prime Minister's Task Group on Emissions Trading.

Despite this COAG decision, at 2 June 2007 meeting of the Environment Protection and Heritage Council (EPHC), state and territory ministers agreed to the reporting of greenhouse gases in the National Pollutant Inventory (NPI) as an interim measure, should activation of the national greenhouse and energy reporting system not have occurred by 1 July 2008. The Australian Government dissented from this decision, and will legislate to establish a new purpose-built monitoring, reporting and verification system.

The announcement of legislating a single streamline reporting system for GHG and energy efficiency has been welcomed by the cement industry. The industry will continue working with relevant Australian Government departments to develop a meaningful set of data and a manageable, secure database to meet both information needs at all levels of government.

**Status** Ongoing

**Pathway 7**

The Australian Government to work with industry to explore the development of national greenhouse intensity factors for alternative fuels. (G)

**Action** The Australian Greenhouse Office (AGO) continues to discuss with the Cement Industry Federation (CIF) the development of appropriate greenhouse intensity factors for non-standard fuels. The AGO is intending to develop a protocol whereby users of non-standard fuels are able to develop accurate emission co-efficients for such fuels. This will be contained in the next version of the AGO Factors and Methods Workbook.

**Status** Ongoing

**Pathway 8**

The Australian Government to work in partnership with the industry on a driver education initiative to improve fuel efficiency and reduce greenhouse gas emissions. (G)

**Action** Being undertaken by the Transport Working Group — see Pathway 13.

**Status** Ongoing

## Pathway 9

Continue to reduce energy use and greenhouse gas emissions through the following strategies:

- switching to biomass as a carbon neutral alternative fuel
- substituting calcined materials such as iron and steel slag and coal combustion products for natural raw materials such as limestone, clay and shales in the raw material mix
- introducing more energy efficient equipment and practices
- increasing the use of fuels with lower CO<sub>2</sub> emission intensities
- extending the use and promotion of Supplementary Cementitious Material (SCM) in cement and concrete manufacture. (I)

**Action** The industry is monitoring progress in reducing energy use and greenhouse gas emissions through the Technology Pathway Report update and the annual CIF survey. The 2006–07 results will be available in the later half of 2007. The Industry is working with other industry associations on strategies to further the progress of SCM (e.g. suitability of fly ash in concrete).

**Status** Ongoing

## Energy Market Reform Working Group

### Pathway 10

Form an Energy Market Group to ensure that the industry's specific issues are understood in the forums considering energy market rules and regulation by:

- monitoring the energy market rule-making process conducted by the Australian Energy Market Commission to make the industry aware of opportunities to comment on regulatory rule-making processes
- informing industry participants about opportunities to participate in specific regulatory determinations made by the Australian Energy Regulator, where the determination relates to the energy transmission distributor operating in their geographic area
- participating in consultation processes through the Ministerial Council on Energy to ensure that cement plants have the ability to sell electricity into the network under an efficient pricing and access regime, thereby increasing the scope for installation of cogeneration at cement plants. (I)

**Action** The Energy Market Reform Working Group was established to make the industry aware of opportunities to monitor, comment on and participate in energy regulatory rule making processes in order to ensure that the energy issues that affect the sustainability of the industry are favourably addressed. The major issues are:

- Price—long term movement and volatility
- Supply—reliability and quality
- Long term supply assurance/sustainability
- Access and ability to sell electricity to grid

The working group recommended to the board that the CIF become a member of the Major Energy Users Association (MEU) who represent large users in the market reform process and monitor the market operation on behalf of large users. The MEU have been reporting back on a regular basis to the working group on the progress of reform and the submissions made. The MEU are also fully aware of the specific issues and opportunities of the cement industry. DITR representatives have provided background on the reform process to the working group and have participated in cement plant familiarisation visits.

The Energy Market Reform Working Group has significantly increased the industry's understanding and awareness of the reform processes and through the MEU have developed the mechanisms for commenting on those.

**Status** Ongoing

## Sustainability Working Group (continued)

**Pathway 11**

Maintain the integrity of the Greenhouse inventory through ongoing review of the industry's mechanisms for reporting on national and international developments. This will ensure alignment with recognised international reporting systems including the updating of factors, boundary definitions and data verification methods. (I)

**Action** The Cement Industry Federation has refined reporting tools to ensure their validity and usefulness to the industry. The WBCSD CSI GHG reporting protocol has been adopted in the 2007 CIF survey, GCP and AP6 reporting.

**Status** Ongoing

**Pathway 12**

Work through the Asia Pacific Partnership on Clean Development and Climate to cooperate on best practice environmental management and greenhouse gas reduction systems in the Australian cement industry. (I)

**Action** There is a strong industry commitment to participating in AP6 with four projects before AP6, that will report on their progress at the September 2007 AP6 and CIF conferences.

**Status** Ongoing

**Pathway 13**

Provide driver training to promote energy efficient driving practices. (I)

**Action** This action is being undertaken by the Transport Working Group. An application has been lodged for funding with Sustainability Victoria. The CIF will report back to the AGO the outcome of a joint initiative with Department of Sustainability and the Environment (DoSE) Victoria. After this work has been completed, a decision can be taken on its possible rollout nationally and the AGO will consider its role in helping to fund any rollout at that time..

**Status** Ongoing

**Pathway 14**

Develop and implement a nationally consistent approach to waste policy, addressing such issues as eco-efficiency, recycling and product stewardship. (G)

**Action** The Productivity Commission handed down a report on Waste Management to which the CIF had also made a submission. The report is being considered by government. The CIF will continue to work with departments to progress the industry concerns with government policy outcomes relevant to the report.

The Environment Protection and Heritage Council (EPHC) has in place national filter criteria to identify priority wastes of national concern and has identified product stewardship as a mechanism for improving the environmental performance of a range of priority products. Any action on priority wastes would be subject to normal cost benefit analysis and whole of government decision making processes.

**Status** Ongoing

### Pathway 15

Remove regulatory impediments to resource recovery and reuse. (G)

**Action** DITR were a major sponsor of the Australasian (iron and steel) Slag Association Annual Conference which had a key theme of sustainability and your bottom line including examining the issue of regulatory and legislative barriers to reuse of co-products. A paper has been produced from this conference and circulated to relevant parties with an interest in this issue.

In September 2006, EPHC agreed to adopt the 'Guidance for assessing the beneficial reuse of industrial residues to Land Management Applications'. The guidance represents a national approach and includes references to reuse as an input to cement and concrete products and to provide energy recovery.

Industry is working with the EPHC and government agencies to ensure that the industry views are known and considered as part of the policy development around waste management. The industry has also met with a number of state governments and is collating a list of examples of regulatory impediments which is to be presented to the Waste Working Group of Commonwealth and state and territory governments.

**Status** Ongoing

### Pathway 16

Australian Government to work with industry and other governments to promote the life cycle benefits of using alternative fuels and materials to the community. (G)

**Action** In addition to DITR sponsoring the Australasian Slag Association conference, DEW sponsored the Waste Management Association of Australia for its 'Energy from Waste' conference held in July 2007. The conference explored sustainable energy recovery from waste and biomass in light of carbon constraints.

The CIF is to explore with DEW a campaign to promote the use of waste and quality of materials manufactured from recycled materials.

**Status** Ongoing

### Pathway 17

Pursue a collaborative and strategic approach to encourage the harmonisation of environmental legislation and regulations impacting the industry, including to:

- contribute submissions to the Australian, State and local governments;
- coordinate a submission from relevant industry associations to the Australian Government on the need for a national inventory of alternative fuels and raw materials;
- work with governments to develop product stewardship schemes; and
- develop commercial recycling schemes to:
  - encourage energy recovery from secondary materials or their reuse as raw materials; and
  - contribute to the elimination of unnecessary environmental impacts associated with current waste management practices. (I)

**Action** The CIF and member companies continue to make representation at all levels of government on the issues of recycling by-products into cement manufacturing to gain certainty and supply where these materials conserve natural materials, energy or GHG.

**Status** Ongoing

**Pathway 18**

In relation to supplementary cementitious material (SCM), to:

- work with relevant industry associations to identify and overcome barriers to increased uptake of SCM and, through joint representation, work to have any regulatory barriers addressed
- seek to increase the use of SCM in cement and concrete to at least 29 per cent by volume by 2012.

**Action** Progress of this target is being measured through the Technology Pathway Report

**Status** Ongoing

**Pathway 19**

Work collaboratively with relevant industry associations and the Australian, state and territory governments to demonstrate the environmental and community benefits of the use of alternative fuels and materials by the industry to the community. (I)

**Action** During the past 12 months, CIF members have promoted the use of alternative fuels and materials through over 50 media articles, promotional materials, tours, presentations, case studies and awards, e.g. SA Good Business Guide, Banksia Awards finalist, Clean Air Society of Australia and New Zealand award.

**Status** Ongoing

## Workforce Working Group

**Pathway 20**

Support industry initiatives to promote careers in the industry and increase student interest in the science, engineering and technology disciplines. (G)

**Action** The Department of Education Science and Training (DEST) is working with industry to promote science, technology and engineering disciplines commencing in primary education through to university and advanced education. This includes initiatives for teachers to increase the attractiveness of the profession and to address shortages in the profession under the Australia's Teachers, Australia's Future: Agenda for Action.

DEST is also working directly with industry through the action agenda to ensure support for the industry initiatives in this area.

**Status** Ongoing

**Pathway 21**

Implement, as agreed by the Council of Australian Governments (COAG), an outcomes-based model for auditing Registered Training Organisations (RTOs) in Australia and provide for mutual recognition of skills qualifications across Australia. (G)

**Action** As a result of the COAG agreement, DEST has been working with industry, RTOs and state and territory governments to ensure the implementation of outcomes-based auditing and mutual skill qualification recognition. It is expected that most issues will be addressed by mid-2007 and the major trades incorporated by the end of the year.

**Status** Almost complete

### Pathway 22

Work with state and local governments and industry to address deficiencies in soft infrastructure identified through engagement with Area Consultative Committees (ACCs). (G)

**Action** The Department of Transport and Regional Services has provided insight into the operation of ACCs and how the industry can tap the local knowledge and enthusiasm that resides within these local organisations.

Industry is commencing initial work in building linkages with ACCs to address soft infrastructure issues. This is in addition to industry involvement with local communities and schools that has traditionally been an important component of regional cement plants engagement and support of local communities.

**Status** Ongoing

### Pathway 23

Continue to maximise the competitiveness of Australia's taxation system to encourage urban Australian and foreign skilled personnel to take up positions in regional locations. (G)

**Action** The Cement Industry Federation is continuing to liaise with government on this issue. Similar approaches are being made to government on this issue by the Australian Petroleum Production & Exploration Association and the minerals industry.

**Status** Ongoing

### Pathway 24

Consider proposals, from the cement and other relevant industries, for concessions or exemptions from fringe benefits tax for education and health costs of employees and their families when the business pays these costs to overcome regional disadvantages affecting its capacity to recruit staff to remote areas. (G)

**Action** The Cement Industry Federation is continuing to liaise with government on this issue.

**Status** Ongoing

### Pathway 25

Develop and implement long-term succession plans to ensure that skilled personnel are available to fill key positions. (I)

**Action** The Industry has overhauled many human resource management policies and practices over the past year and the three companies have implemented succession planning strategies to address this issue.

**Status** Complete

**Pathway 26**

Develop a strategy to promote the benefits of a career in the cement industry; including a career and industry information package for use by the National Industry Career Specialists Network and the Regional Industry Career Advisers Network, as part of the Australian Government's Career Advice Australia initiative.

**Action** This action has been signed off as a priority initiative with industry. The industry is working closely with DEST as part of the strategic national initiatives to address extant and looming skill shortages across a number of industries.

**Status** Ongoing

**Pathway 27**

Dispel negative perceptions of the regional lifestyles and communities in which it operates and promote the many positive features of regional life. Each cement plant will tailor an individual strategy to inform potential and existing employees about the information and services available in their regions.

**Action** Refer to actions within Pathway 22

**Status** Ongoing

**Pathway 28**

Work with Area Consultative Committees (ACCs) to:

- promote the cement industry's pivotal role in the community
- identify inadequate education, health and lifestyle services and develop strategies to access government and community funds to address them
- develop options for community development assistance, particularly in such areas as the provision of social and soft infrastructure and options to mitigate the threat of urban encroachment.

**Action** Refer to actions within Pathway 22

**Status** Ongoing

**Pathway 29**

Work with government to develop and implement a strategy for sustaining workplace flexibility, by increasing and maintaining industry awareness of high performance workplace models which guarantee flexible and competitive terms of employment.

**Action** The Cement Industry Federation is continuing to liaise with government on this issue.

**Status** Ongoing



**Pathway 30**

Identify instances where poorly constructed workplace agreements create unnecessary skills and qualifications demarcations, with the goal of addressing these demarcations in future workplace agreements.

**Action** The National Code of Practice for the Construction Industry has been in operation since 1997 and has recently been confirmed as applying to the cement industry. The industry is working with DEWR to prepare a timetable to implement the code.

**Status** Almost complete

**Pathway 31**

Support the WorkChoices legislation and measures to ensure that right of entry provisions are exercised only to investigate Occupational Health and Safety matters.

**Action** Refer to actions within Pathway 30.

**Status** Almost complete

**Pathway 32**

Review any State based or contractual employment agreements to ensure that they are compliant with the National Code of Practice for the Construction Industry (the Code) and the Australian Government Implementation Guidelines (the Guidelines), in consultation with the Federal Department of Employment and Workplace Relations.

**Action** Refer to actions within Pathway 30.

**Status** Almost complete

## Transport Working Group

**Pathway 33**

Roads—Work toward a national approach to certification of Higher Mass Limits (HML) accreditation. (G)

**Action** In accordance with the COAG February 2006 action, individual jurisdictions are assessing the extent to which they can offer up more HML network in accordance with the already agreed HML policy. Many States and the NT already have extensive HML networks.

**Status** Ongoing

**Pathway 34**

Roads—Remove anomalies in the HML network to deliver a national approach. (G)

**Action** Queensland and NSW have, as a result of the AusLink Bilateral agreement, significantly increased the HML routes in late 2006. The Australian Transport Council (ATC) in May 2007 agreed to the establishment of a working group comprising officials from NSW, Qld, Victoria and the Commonwealth to examine opening up further networks to HML in NSW, Qld and Victoria.

**Status** Ongoing

**Pathway 35**

Roads—Address specific areas of concern to the cement industry, as identified in this report in the network of routes for heavy vehicles. (G)

**Action** The AusLink National Network is the focus of Australian Government funding as it represents our major freight routes. Projects on the Network will be determined once the corridor strategies have been completed.

**Status** Ongoing

**Pathway 36**

Roads—Ensure that road user charges take account of whole of government policy in the areas of energy efficiency, productivity improvements and greenhouse gas reduction rather than being based solely on tare weight. (G)

**Action** Operators of heavy diesel vehicles must comply with a number of environmental criteria before they are eligible to receive the fuel tax credit. Industry is preparing a submission, in conjunction with the Australian Transport Association, on the 2007 Heavy Vehicle Charges Determination which will in part draw attention to efficiency, environmental and safety benefits of heavy mass vehicles.

**Status** Ongoing

**Pathway 37**

Rail—Help allocate adequate space for rail terminals adjacent to rail lines by including the spill-over benefits of this use, when making decisions on the allocation of suitable surplus government land. (G)

**Action** Decisions on land-use planning, preservation and zoning are a matter for state governments. The industry will follow-up with individual State jurisdictions.

**Status** Ongoing

**Pathway 38**

Rail—Deliver a higher level of access to the freight rail system and, where critical, establish dedicated freight lines. (G)

**Action** The Australasian Rail Track Corporation (ARTC), owned by the Australian Government, operates an open access regime on its interstate track whose terms have been accepted by the Australian Competition and Consumer Commission (ACCC) in May 2002.

The Australian Government, through AusLink, and the ARTC are investing over \$2.4 billion in rail infrastructure including the construction of the Southern Sydney Freight line.

The line will help to overcome one of the major impediments to efficient rail freight movements between Melbourne, Sydney and Melbourne.

**Status** Ongoing

### Pathway 39

Rail— Deliver an open access regime for terminals (for example: by making access to land by rail track owners conditional on the construction of common access terminals). (G)

**Action** Terminals have traditionally been run by private sector companies. Land-use issues are usually resolved by the relevant state government. The industry will follow-up with individual state jurisdictions.

**Status** Ongoing

### Pathway 40

Rail— In Tasmania, separate ownership of track and rolling-stock. (G)

**Action** Pacific National and the Tasmanian Government have agreed to a \$78 million rescue package provided by the Australian Government. As part of this Pacific National will pass ownership of the track back to the Tasmanian Government which is currently progressing enabling legislation.

The company affected by the decision (Cement Australia) has lodged a submission with the National Competition Council in relation to the Tasmanian Government's application to formalise the resumption of the track lease from Pacific National.

**Status** Ongoing

### Pathway 41

Shipping— Provide secure access to port berthing for small to medium sized industry. (G)

**Action** Ports are the responsibility of the states/ Northern Territory. The industry has been advised to seek commercial resolution of issues between relevant port authority and the ship operator/shipper. In addition to that approach, DOTARS intends to raise this issue within the Australian Maritime Group (AMG), a consultative forum for Commonwealth, state and territory officials, in the context of broader coastal shipping issues arising out of a recent study of coastal shipping commissioned by AMG.

**Status** Ongoing

### Pathway 42

Shipping— Seek to have the states and the Northern Territory agree to the coastal trade permits issued under the *Navigation Act 1912* becoming the single national system for the regulation of inter- and intra-state voyages and elimination of the Queensland permit system (Restricted Flag Use). (G)

**Action** Elimination of state/ territory regulation is a matter for state/ territory jurisdictions, however DOTARS will be discussing issues related to coastal shipping licences and permits within the Australian Maritime Group (AMG) in the context of a recent study commissioned by AMG into coastal shipping issues.

**Status** Ongoing

**Pathway 43**

Reduce the road transport of product through greater use of bulk rail and sea transport (provided that transport infrastructure and availability issues are addressed). (I)

**Action** The timeframes for issues to be addressed through the Australian Transport Council will and other forums will dictate the achievement of this action.

**Status** Ongoing

**Pathway 44**

Nominate a representative from each member of the Cement Industry Federation to work jointly with the Australian Government Department of Transport and Regional Services and state, territory and local governments, to develop a transport strategy to pursue reforms in appropriate forums. (I)

**Action** Appropriate members have been sourced from all companies to be included in the working group. Specialist advice is being sourced from the Australian Trucking Association and joint approaches to relevant issues being pursued with Cement, Concrete and Aggregates Australia (CCAA).

**Status** Ongoing

**Pathway 45**

Report annually on the industry's progress in achieving these goals. (I)

**Action** This report represents the first instalment on progress.

**Status** Ongoing

## Trade Working Group

**Pathway 46**

Australian Customs Service to enhance its information about the identification and verification of pricing and provision of free-on-board pricing, during dumping investigations. (G)

**Action** The Australian Customs Service and the Department of Industry Tourism and Resources completed a joint study of the administration of Australia's anti-dumping system. The study addressed the key issues raised in the action agenda with Customs currently reviewing progress on implementing the 22 recommendations. Customs has substantially upgraded its industry liaison function as a result of this report.

Customs is following up this study with a more detailed review of their functions and relationships with industry and are consulting on the terms of reference for this review.

The Cement Industry Federation is represented on the Trade Remedies Task Force which ensures that the industry is appraised of any changes taking place in Australia's anti-dumping regime.

**Status** Ongoing

**Pathway 47**

Aim to take anti-dumping decisions in a timely fashion. (G)

**Action** Refer to actions within Pathway 46.

**Status** Ongoing

**Pathway 48**

Aim to take decisions on provisional anti-dumping measures as soon as possible after Day 60 of an investigation. (G)

**Action** Refer to actions within Pathway 22

**Status** Ongoing

**Pathway 49**

Australia Customs Service to work with Australian industry to address 'country hopping', when it is considered to be occurring. (G)

**Action** Refer to actions within Pathway 46.

**Status** Ongoing

**Pathway 50**

Consider clarifying the ministerial guidance on material injury, including the assessment of injury in an expanding market where market share is being lost. (G)

**Action** Refer to actions within Pathway 46.

**Status** Ongoing

**Pathway 51**

The Department of Foreign Affairs and Trade to conduct outreach activities with the cement industry, to increase the industry's understanding of safeguard procedures and the WTO rules relating thereto. (G)

**Action** Refer to actions within Pathway 46.

**Status** Ongoing

**Pathway 52**

The Cement Industry Federation (CIF) will ensure that all data needed for future anti-dumping cases is kept up-to-date on a six monthly basis, to expedite future anti-dumping processes. (I)

**Action** The CIF is ensuring that all data is up-to-date with six monthly revisions of relevant data.

**Status** Completed

**Pathway 53**

Closely monitor normal values for cement produced in competing countries. (I)

**Action** Refer to actions within Pathway 52.

**Status** Ongoing

**Pathway 54**

The CIF will work with Customs to ensure its officials are familiar with the cement industry. (I)

**Action** The Cement Industry Federation works closely with Customs and participates in the Trade Remedies Task Force which ensures that Customs is kept apprised of issues relevant to the Cement Industry.

**Status** Ongoing





**CEMENT INDUSTRY  
FEDERATION**



**Australian Government**  
Department of Industry,  
Tourism and Resources