

Our future industry – delivering and prospering through the net zero transition

Event Programme
13 – 14 June 2023

CEO GATHERING
AND LEADERS
CONFERENCE

20 ZÜRICH
23

CONCRETE
FUTURE

President's welcome



We have an enormous role to play to ensure our people, our companies, our communities and planet can thrive today, and into the future."

It is a great honour to welcome you to Zurich for our 2023 GCCA CEO Gathering and Leaders Conference. I am extremely grateful for the efforts that you have made to travel here from all corners of the world.

This event represents our biggest gathering since our launch in 2018 and it is great to reflect on how far the GCCA and the industry has come in the last five years.

The world continues to change. The climate crisis and other challenges continue to test us as leaders of an essential industry. We have an enormous role to play to ensure our people, our companies, our communities and planet can thrive today, and into the future.

By collaborating, sharing ideas, restating our commitment and redoubling our efforts we can positively shape our collective response – in fighting climate change, building resilient communities, supporting the building of safe homes and nature positive modern cities, delivering clean water and green energy, creating better lives and prosperity for all the world.

As members of the GCCA, we can be proud of the progress and positive difference we are making. The journey ahead remains complex but most things worthwhile require focus and determination.

I remain convinced the best days are ahead for our world and our industry as we address the challenges of the transition, but also harnessing the new opportunities it provides.

I hope that you enjoy these days ahead – we have some big topics to discuss. I also hope you have time for reflection and to interact with your peers as we travel together along our shared journey.

Jan Jenisch
GCCA President; Chairman and
Chief Executive Officer of Holcim



CEO's reflections



We also have a greater shared purpose, to ultimately deliver net zero concrete, and what a great prize that will be for the world."

Can I also take the opportunity to welcome all our guests to Zurich – a genuinely modern city embracing both its history and its future. Look up and you can see concrete all around you.

Cement and concrete are indeed essential for the world – and you, our CEOs and leaders, are the custodians of the future of our great industry. We also have a greater shared purpose, to ultimately deliver net zero concrete, and what a great prize that will be for the world – a product that is strong, durable, recyclable, resilient, local, versatile and transformational – but also decarbonised.

That is the commitment you have made together and that is the theme of our conference. Both exploring the role and future of cement and concrete in the world, and also mapping out how we deliver on our pledge.

We have a busy programme with two full days of great speakers and insights to help prompt our deliberations. We have our best line up yet, from world leaders to national governments, from industry specialists and climate experts to our customers and users – because we cannot achieve our mission by ourselves.

The GCCA family is only as strong as the support we receive from our member companies, and the national and regional associations who make up our affiliate network. It is important for me to thank you for the contribution you and your teams play in delivering our Work Program. Whilst there is lots to do ahead, I sincerely believe we are making a difference.

On behalf of the GCCA team, I can say we are very much looking forward to all our discussions and know that we can count on you for your input and contributions in the days ahead.

Thomas Guillot
GCCA Chief Executive



Our member companies and affiliates operate in almost every country of the world

Our Members

- Adani Cement (pending application)
- Asia Cement Corporation
- Breedon Group
- Buzzi Unicem
- Cimenterie Nationale
- Cementir Holding
- Cementos Argos
- Cementos Moctezuma
- Cementos Molins
- Cementos Pacasmayo
- Cementos Progreso
- CEMEX
- Çimsa Cement
- CNBM
- CRH
- Dalmia Cement
- Dangote
- Fletcher Building
- GCC
- Heidelberg Materials
- Holcim
- Huaxin Cement
- JK Cement
- JK Lakshmi Cement (pending application)
- JSW Cement
- Medcem
- Misr Cement Group
- Neshor Israel Cement Enterprises
- Norm Cement
- Orient Cement
- PT Solusi Bangun Indonesia
- SCHWENK Zement
- Secil
- Siam Cement Group
- Siam City Cement
- Taiheiyo Cement
- Taiwan Cement Corporation
- TITAN Cement Group
- UltraTech Cement
- UNACEM
- Vassiliko Cement
- Votorantim Cimentos
- YTL Cement

Our Affiliates – partner national and regional industry associations

- 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
- Betonhuis – Netherlands
- BIBM – Europe
- CANACEM – Mexico
- Canadian Precast Prestressed Concrete Institute
- Cement Association of Canada
- Cement Concrete & Aggregates Australia
- Cement Industry Federation – Australia
- Cement Manufacturers Association – India
- Cement Manufacturers Ireland
- Concrete NZ – New Zealand
- European Cement Association (CEMBUREAU)
- European Federation Concrete Admixtures
- European Ready Mixed Concrete Organisation
- Federación Iberoamericana del Hormigón Premezclado – LatAm
- Federación Interamericana del Cemento (FICEM) – LatAm
- Japan Cement Association
- Korea Cement Association
- Mineral Products Association United Kingdom
- National Ready Mixed Concrete Association – USA
- Portland Cement Association – USA
- Thai Cement Manufacturers Association
- The Spanish Cement Association (Oficemen)
- Turkish Cement Manufacturers Association (TürkÇimento)

Event programme

Day 1: Tuesday 13 June

Attire: Business or Business Casual for Conference

All our main conference sessions and gala dinner are being held at Hyatt Regency Zurich Airport & The Circle Convention Center – Conference Room B and C

The essential role of concrete and the cement industry

| TIMING | TITLE | THEMES EXPLORED |
|-----------------------------------|---|--|
| 09:00 – 10:00 | Registration coffee and networking | |
| SESSION 1 10:00 – 12:00 | Welcome and Introductions High Level Kick off Regionally focused CEO Action Panel GCCA Programme update and priorities Speakers: Jan Jenisch, GCCA President; Chairman and CEO, Holcim Thomas Guillot, CEO, GCCA António Guterres, UN Secretary General Catherine McKenna, Former Climate Minister & Chair UN High-Level Expert Group on the Net-Zero Emissions Commitments José Raúl González CEO, Cementos Progreso Hakan Gurdal, Member of the Managing Board, Heidelberg Materials Yeqing Li, CEO, Huaxin Cement Kailash Jhanwar, CEO, UltraTech Cement | <ul style="list-style-type: none"> - The climate challenge is urgent - The world needs our industry's joint action to deliver our net zero mission |
| 12:00 – 13:30 | Lunch networking – buffet lunch | |
| SESSION 2 13:30 – 15:00 | Essential role of concrete in the built environment Speakers: Mahendra Singhi, CEO, Dalmia Cement Bharat Limited Paul Adeleke, Strategy, Policy and Communications Director, GCCA Bernard Mathieu, Executive Director, Sustainable Development Initiative of the Solvay Brussels School Sheila Aggarwal-Khan, Director, Industry and Economy Division, UNEP Sanjay Seth, Senior Director of the Sustainable Infrastructure Programme, The Energy and Resources Institute and VP & CEO of GRIHA Council Emmanuel de Lanversin, Deputy Director at the Directorate for Housing, Urban Development and Landscape of the French Government | <ul style="list-style-type: none"> - Cement and Concrete underpin and are essential to delivering a sustainable, resilient and prosperous world - But the carbon challenge needs to be, and is being addressed |
| 15:00 – 15:30 | Short coffee break | |

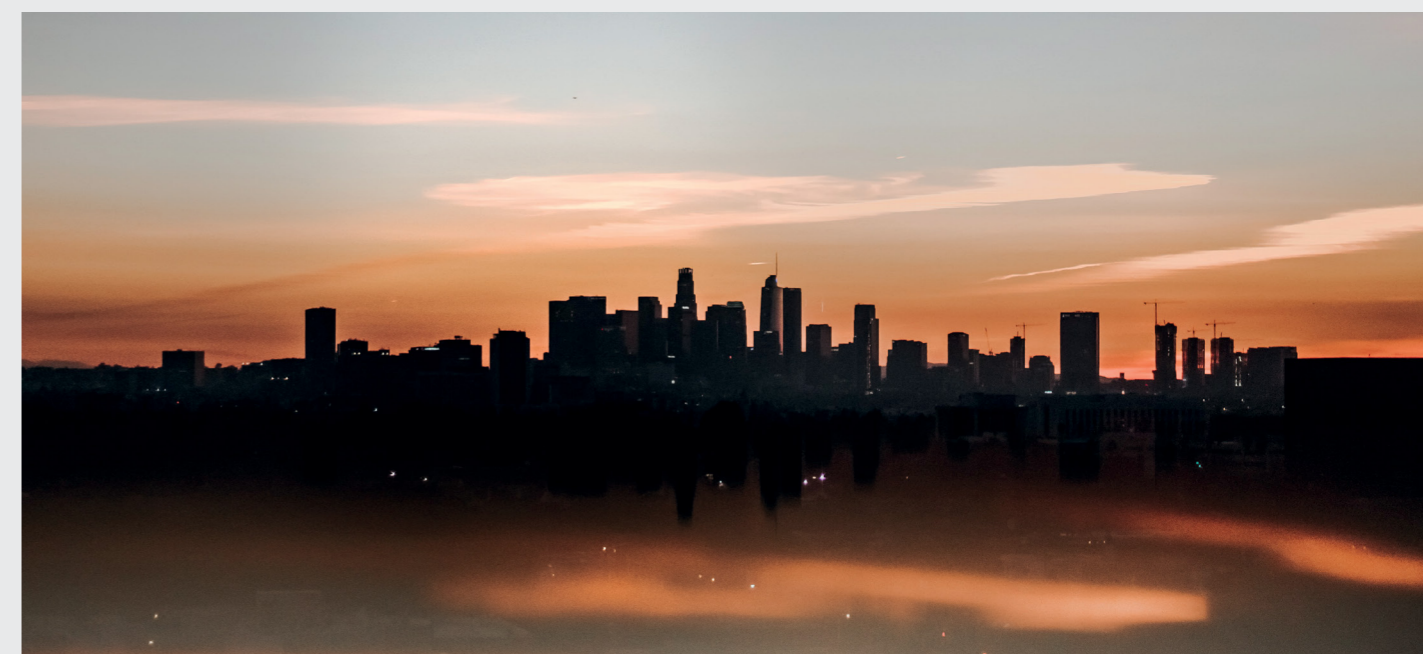
Event programme

Day 1: Tuesday 13 June (continued)



The essential role of concrete and the cement industry

| TIMING | TITLE | THEMES EXPLORED |
|-----------------------------------|---|---|
| SESSION 3 15:30 – 17:15 | Demand for low carbon concrete and customers perspective Speakers: Rob Wood, CEO, Breedon Group Dr Andrew Minson, Concrete and Sustainable Construction Director, GCCA Guillaume Ricome, Managing Director & Partner, BCG Stuart Smith, Director, ARUP Isabelle Spiegel, Chief Environmental Officer, VINCI Rana Ghoneim, Unit Chief, Department of Energy, UNIDO Dimitrios Koufos, Head of Sustainable Business, Industry, Agribusiness and Commerce, EBRD | <ul style="list-style-type: none"> - Demand and the urgency for low carbon concrete and near net zero concrete is now - What are the procurement impacts and processes - How procurement might address the carbon challenge - Built environment project team perspective on sustainability and decarbonisation - Linking procurement to financing of low carbon production initiatives |
| 17:15 – 17:30 | Reflection, discussion and close | |
| 18:30 – 19:30 | Reception Drinks reception and networking | |
| 19:30 – 22:30 | Gala Dinner Entertainment and networking (business attire) | |



Event programme

Day 2: Wednesday 14 June

Attire: Business or Business Casual for Conference

All our main conference sessions and gala dinner are being held at Hyatt Regency Zurich Airport & The Circle Convention Center – Conference Room B and C

The Net Zero Transition: Delivering, Leveraging & Prospering

| TIMING | TITLE | THEMES EXPLORED |
|-----------------------------------|--|--|
| 08:00 – 08:30 | Morning Coffee, pastries and networking | |
| SESSION 4 08:30 – 10:30 | <p>Our Net Zero Transition:</p> <ul style="list-style-type: none"> – How does the world pay for the transition – Sector transition strategy – Finance and opportunities – Policy framework – Circularity and opportunities – How can the cement sector transition be profitable/viable <p>Thomas Guillot, CEO, GCCA</p> <p>Jean Pierre Danthine, Economist & Former Deputy Chairman, Swiss National Bank</p> <p>Eveline Speelman, Partner and Board Member, Systemiq</p> <p>Martin Schneider, Chief Executive, VDZ and Managing Director of the European Cement Research Academy (ECRA)</p> <p>Dr. Chris Bataille, Adjunct Research Fellow, Centre for Global Energy Policy, Columbia University</p> <p>Sebastian Reiter, Partner, McKinsey</p> | <ul style="list-style-type: none"> – There is a cost for the transition, but it is relative compared to other sectors and there are mechanisms that can ensure it can be shared across society, industry, customers and users of our material – Our industry has a bright and viable future through the transition |
| 10:30 – 11:00 | Short coffee break | |



Event programme

Day 2: Wednesday 14 June (continued)



The Net Zero Transition: Delivering, Leveraging & Prospering

| TIMING | TITLE | THEMES EXPLORED |
|-----------------------------------|---|---|
| SESSION 5 11:00 – 13:00 | <p>Innovation and driving technologies:</p> <ul style="list-style-type: none"> – New materials for low carbon concrete – CCUS Advancement <p>Juan Esteban Calle, CEO, Cementos Argos</p> <p>Claude Loréa, Cement, Innovation and ESG Director, GCCA</p> <p>Professor Karen Scrivener, EPFL</p> <p>Dr. Davide Zampini, Vice President of Global R&D, CEMEX</p> <p>Bodil Recke, Head of Green Innovation, FLSmidth</p> <p>Dr. Tongbo Sui, Vice president of Sinoma International, CNBM</p> <p>Jarad Daniels, CEO, Global CCS Institute</p> <p>Dr. Katherine Romanak, Research Scientist, University of Texas</p> <p>Beth (Hardy) Valiaho, Vice-President, Policy, Regulatory & Stakeholder Relations, The International CCS Knowledge Centre</p> <p>Alexander Engh, Deputy Director General at the Norwegian Ministry of Petroleum and Energy, CCS</p> | <ul style="list-style-type: none"> – Innovation will help unlock our net zero future – Our industry is fully committed to driving and advancing innovation and new technologies |
| 13:00 – 14:15 | Lunch networking – buffet lunch | |
| SESSION 6 14:15 – 16:00 | <p>Cement breakthrough and policy dialogue</p> <p>Thomas Guillot, CEO, GCCA</p> <p>François-Philippe Champagne, Minister of Innovation, Science and Industry – Government of Canada</p> <p>Fernando A. González, GCCA Vice-President and Chief Executive Officer, CEMEX</p> <p>Andrew Noseworthy, Assistant Deputy Minister Clean Technologies, Innovation, Science and Economic Development Canada, Government of Canada</p> <p>Adam Auer, CEO, Cement Association of Canada</p> <p>Dr Chana Poomee, Chairman, Thai Cement Manufacturers Association and VP of Siam Cement Group (SCG)</p> <p>Manuel Lascarro, General Director, Colombian Chamber of Cement and Concrete (PROCEMCO)</p> | <ul style="list-style-type: none"> – Policy dialogue: how can governments across the world set a positive environment to support acceleration of decarbonisation of the cement and concrete sector |
| 16:00 – 16:15 | Gathering close | |
| 16:30 – 18:30 | Partnership Council Affiliates meeting | |

Our speakers

(See GCCA website for full biographies)



SESSION 1



Jan Jenisch
GCCA President; Chairman and Chief Executive Officer, Holcim

Jan Jenisch joined Holcim as CEO in 2017, with the vision to lead Holcim to become the global leader in innovative and sustainable building solutions. Under his leadership, Holcim has reached a new level of strength, with record profitability levels, 60,000 people worldwide and industry leading ESG ratings.



Thomas Guillot
Chief Executive Officer, GCCA

Thomas joined the GCCA in 2021 and has over 20 years of sustainability experience with a key focus on circularity and industrial ecology in both operational and functional roles. He has also held leading positions across various industrial associations.



António Guterres (Special industry message)
Secretary-General of the United Nations

António Guterres has served as Secretary-General of the UN since 2017, the ninth person to hold this title. A member of the Portuguese Socialist Party, Guterres served as prime minister of Portugal from 1995 to 2002.



Catherine McKenna
Former Climate Minister & Chair UN High-Level Expert Group on the Net-Zero Emissions Commitments

As Minister of Environment and Climate Change, Catherine was a lead negotiator of the Paris Agreement, negotiated Canada's climate change plan including a coal phase-out and price on carbon, brought in a new Impact Assessment Act for major projects and doubled the amount of nature protected in Canada.

Internationally she co-founded the Powering Past Coal Coalition and the Ministerial on Climate Action. As Minister of Infrastructure, she made historic investments in sustainable infrastructure including leveraging private sector investment through the Canada Infrastructure Bank.

SESSION 2



Paul Adeleke
Strategy, Communications & Policy Director, GCCA

Paul leads the GCCA's work on outreach and engagement to positively position the industry and achieve global recognition for concrete as the sustainable building material of choice. Paul has extensive experience in reputation and public affairs, working for global business, industries and governments around the world.



Bernard Mathieu
Executive Director, Sustainable Development Initiative of the Solvay Brussels School

Bernard has more than 20 years of experience in the deployment of sustainability initiatives in the cement and concrete sector. He was notably Director, Environmental Sustainability at HeidelbergCement and Head of Sustainable Development at Holcim and LafargeHolcim. He is now acting as an independent consultant in the decarbonisation of energy-intensive sectors, including cement, lime and aluminium.



Sheila Aggarwal-Khan
Director, Industry and Economy Division, UNEP

Sheila has over 30 years of management and technical expertise from a range of institutions. Sheila was previously the Director of the Green Climate Fund and Global Environment Facility operations at the International Union for the Conservation of Nature (IUCN). Under Sheila's leadership at IUCN, the programme grew from the two largest global environmental funding mechanisms five-fold, increasingly bringing in actors from the banking, investment and insurance sectors alongside those from sectors such as energy and agriculture.



Sanjay Seth
Senior Director of the Sustainable Infrastructure Programme, the Energy and Resources Institute and VP & CEO of GRIHA Council

Sanjay covers a range of activities from City to Building Level Interventions, including policy analysis, sustainable urban planning, mainstreaming of sustainable habitats in the built environment, promoting low carbon & sustainable transportation, capacity building and knowledge creation.



Emmanuel de Lanversin
Deputy Director at the Directorate for Housing, Urban Development and Landscape of the French Government

Emmanuel has 30-years of professional experience in the construction industry as well as in urban planning and transportation. He puts his energy into the design and efficiency of cities so they can fulfil their purpose as places to meet and interact.

Our speakers

(See GCCA website for full biographies)



SESSION 3



Dr. Andrew Minson
Concrete and Sustainable Construction Director, GCCA

Andrew leads the GCCA's work promoting the sustainability value of concrete in future construction. His role includes improving the understanding of concrete's lifecycle and its role in the circular economy. Andrew led the Net Zero 2050 Roadmap work and the ongoing Net Zero Accelerator initiative to take global commitment to local action through national roadmaps. He has extensive experience across the built environment and is a Fellow of both Civil and Structural Engineering Institutions based in the UK.



Guillaume Ricome
Managing Director & Partner at BCG, Global Lead Building Materials Practice

Guillaume has over 15 years' experience working for Industrial companies, covering projects in Material and Process Industries, with a particular focus on the building materials value chain: heavy-side, light-side products, distribution and construction.



Stuart Smith
Director, ARUP

Stuart Smith leads the structural design team at Arup in Germany. He is an expert in innovation and sustainability in structural design. He set up a series of research projects – including the development of prototypes – exploring open-source design, digital fabrication and material cycles.

SESSION 3 (continued)



Isabelle Spiegel
Chief Environmental Officer, VINCI

With VINCI since August 2019, and member of the VINCI Executive Committee since 2022, Isabelle Spiegel is in charge of implementing the Group's Environmental Ambition within all entities (VINCI Construction, VINCI Energies, VINCI Concessions, VINCI Autoroutes and VINCI Immobilier).



Rana Ghoneim
Unit Chief, Department of Energy, UNIDO

Rana is the Chief of the Energy Systems and Industrial Decarbonisation Unit at UNIDO, where she oversees the organisation's strategy and programmes in promoting a low carbon infrastructure, powering industrialisation and supporting the decarbonisation of industry in developing and emerging economies.



Dimitrios Koufos
Head of Sustainable Business, Industry, Agribusiness and Commerce, EBRD

Dimitrios has more than twenty-five years of practical experience in areas such as Production Technology & Process Optimisation, Production Management Systems, Energy & Environmental Technology, Energy & Environmental Legislation/Reporting, Supply Chain Management, Technology Strategy, Investment Analysis, Corporate & Project Finance, in companies like Shell, Motor Oil Hellas, TITAN Cement, and currently in the European Bank for Reconstruction and Development (EBRD).

Our speakers

(See GCCA website for full biographies)



SESSION 4



Jean-Pierre Danthine
Economist & Former Deputy Chairman, Swiss National Bank

Jean-Pierre is dedicated to inspiring and activating the transition to a resilient, inclusive and sustainable economy, mindful of the opportunities and challenges offered by technology. He is also a member of the Board of the Fondation Leenaards and of the Fondation Schlumberger pour la recherche et l'éducation.



Eveline Speelman
Partner and Board Member, Systemiq

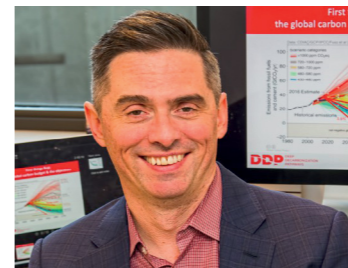
Eveline Speelman is a partner and appointed board member of Systemiq, a systems change company that partners with business, finance, policy-makers, and civil society to make economic systems truly sustainable. Eveline has founded and manages Systemiq's Amsterdam office and she co-leads our global Energy Transition Platform. Systemiq participates through the Energy Transition Commission in the Mission Possible Partnership as core founder and Eveline oversees the development of all of the Sector Transition Strategies of the Mission Possible Partnership, including the upcoming Sector Transition Strategy for Concrete and Cement.



Martin Schneider
Chief Executive, VDZ and Managing Director of the European Cement Research Academy (ECRA)

Being the head of VDZ for more than 20 years, Martin has developed VDZ into a knowledge centre of the cement and concrete industry, providing services for the whole construction value chain. Martin not only heads VDZ with its 200 experts in Duesseldorf but also serves as a strategic advisor for many cement companies around the world.

SESSION 4 (continued)



Dr. Chris Bataille
Adjunct Research Fellow, Centre for Global Energy Policy, Columbia University

Dr. Chris Bataille has been active in energy and climate policy analysis for 27 years as a researcher, energy systems and economic modeler, project manager, and managing consultant/partner. He is focused on technology and policy pathways to net-zero GHG emissions by all sectors by 2050-'70 to meet the Paris Agreement goals.



Sebastian Reiter
Partner, McKinsey

Sebastian is a partner at McKinsey based in Munich. He serves clients globally on strategy, operations and sustainability-related topics drawing on his deep experience in more than 20 countries. Sebastian co-leads the firm's sustainability work in the built environment. He is passionate about helping companies across the cement ecosystem, shaping their decarbonisation and circularity pathways.

Our speakers

(See GCCA website for full biographies)



SESSION 5



Claude Loréa
Cement, Innovation and ESG Director, GCCA

Claude leads all aspects of GCCA work related to cement and works to continuously improve the sustainability performance of the industry through innovation, and through developing and sharing good practices and global guidelines. Claude's previous role was at the European cement industry body, CEMBUREAU where she was Deputy Chief Executive and Industrial Affairs Director.



Prof. Karen Scrivener
Professor EPFL

Karen is a material chemist known for her pioneering works in cementitious materials. She is the head of Laboratory of Construction Materials at École Polytechnique Fédérale de Lausanne and served as the editor-in-chief of the Cement and Concrete Research Journal for 15 years.



Dr. Davide Zampini
Vice President of Global R&D, CEMEX

Dr. Davide Zampini leads a multi-disciplinary group of top scientists and specialists that spearhead new technologies and solutions for the world's building materials market.



Bodil Recke
Head of Green Innovation, FLSmidth

During her 23 years at FLSmidth, Bodil has worked on improving energy and process efficiencies on most of FLSmidth's equipment. She has built modelling and online advanced process control solutions for cement and mining processes and equipment, moving the target for how sustained optimisation can be achieved in practice.



Dr. Tongbo Sui
Vice President of Sinoma International, CNBM

He has been intensively engaged for over 20 years in R&D of low energy and low CO₂ clinker cements and advanced cement-based materials. Before joining Sinoma in 2010, he worked as Vice President of China Building Materials Academy during 2006–2010. He is now also a visiting professor at University College London of UK and senior advisor of China Cement Association, and active in international organizations as co-chair of WKG5 for Cement Innovation under the GCCA, and Fellow of ICT, UK.

SESSION 5 (continued)



Jarad Daniels
CEO, Global CCS Institute

Jarad joined the Institute as Chief Executive Officer in October 2021, bringing with him over 20 years of international collaboration and leadership on clean energy and sustainable development. He has broad expertise in energy and deep experience in Carbon Capture and Storage, having worked with many countries, multilateral organisations, NGOs, and companies on technology development and deployment and government policy.



Dr. Katherine Romanak
Research Scientist, University of Texas

Katherine is a geochemist at the University of Texas at Austin, developing innovative approaches to monitoring geologic CO₂ storage sites.



Beth (Hardy) Valiaho
Vice-President, Policy, Regulatory & Stakeholder Relations,
The International CCS Knowledge Centre

Beth represents the Knowledge Centre amongst global decision makers and financiers to accelerate engagement on, and understanding of, the deployment of carbon capture and storage (CCS); and focuses on helping to link CCS knowledge within Canada and with other countries, to reduce locked-in investments and collaboratively support the goals of the Paris Agreement.



Alexander Engh
Deputy Director General at the Norwegian Ministry of Petroleum
and Energy, CCS

Alexander is responsible for CCS policy development in Norway. He has negotiated state aid agreements for the Longship project, including Heidelberg Material's project in Brevik. Prior to joining the Ministry, he served as Commercial director of Infragas (from 2012 to 2018).

Our speakers

(See GCCA website for full biographies)

SESSION 6



François-Philippe Champagne
Minister of Innovation, Science and Industry – Government of Canada

The Honourable François-Philippe Champagne was first elected in 2015 as the Member of Parliament for Saint-Maurice—Champlain. He now serves as the Minister of Innovation, Science and Industry in Canada's 42nd Parliament. He is a businessman, lawyer, and international trade specialist with over 20 years' experience at large international companies in Europe, particularly in the fields of energy, engineering, and innovation.



Andrew Noseworthy
Assistant Deputy Minister Clean Technologies, Innovation, Science and Economic Development Canada – Government of Canada

Andrew has overseen policy and operational activities related to clean technology in Canada, including the Clean Growth Hub, and served as co-Secretary to one of the Economic Strategy Tables. Prior to joining the public service in 2003, he had an 18-year career with the Government of Newfoundland and Labrador, where he held a number of senior appointments.

Many thanks to all our CEOs for their input into the programme – **special thanks to:**



José Raúl González
CEO, Cementos Progreso



Hakan Gurdal
Member of the Managing Board, Heidelberg Materials



Yeqing Li
CEO, Huaxin Cement



Kailash Jhanwar
CEO, UltraTech Cement



Mahendra Singhi
CEO, Dalmia Cement Bharat Limited



Rob Wood
CEO, Breedon Group



Juan Esteban Calle
CEO, Cementos Argos



Fernando A. González
GCCA Vice-President and Chief Executive Officer, CEMEX



Adam Auer
CEO, Cement Association of Canada



Dr Chana Poomee
Chairman, Thai Cement Manufacturers Association and VP of Siam Cement Group (SCG)



Manuel Lascarro
General Director, Colombian Chamber of Cement and Concrete



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