

A modern building with a glass facade and concrete pillars. The building is surrounded by greenery, including bushes and aloe vera plants. A person with a backpack is walking on a paved path in the foreground. The word "CATALYST" is visible on the building's facade.

**The Ever-Changing
Landscape of the
California Legislative
& Regulatory
Environment and its
Impacts**

**West Coast Cement
Conference
10.17.2025**

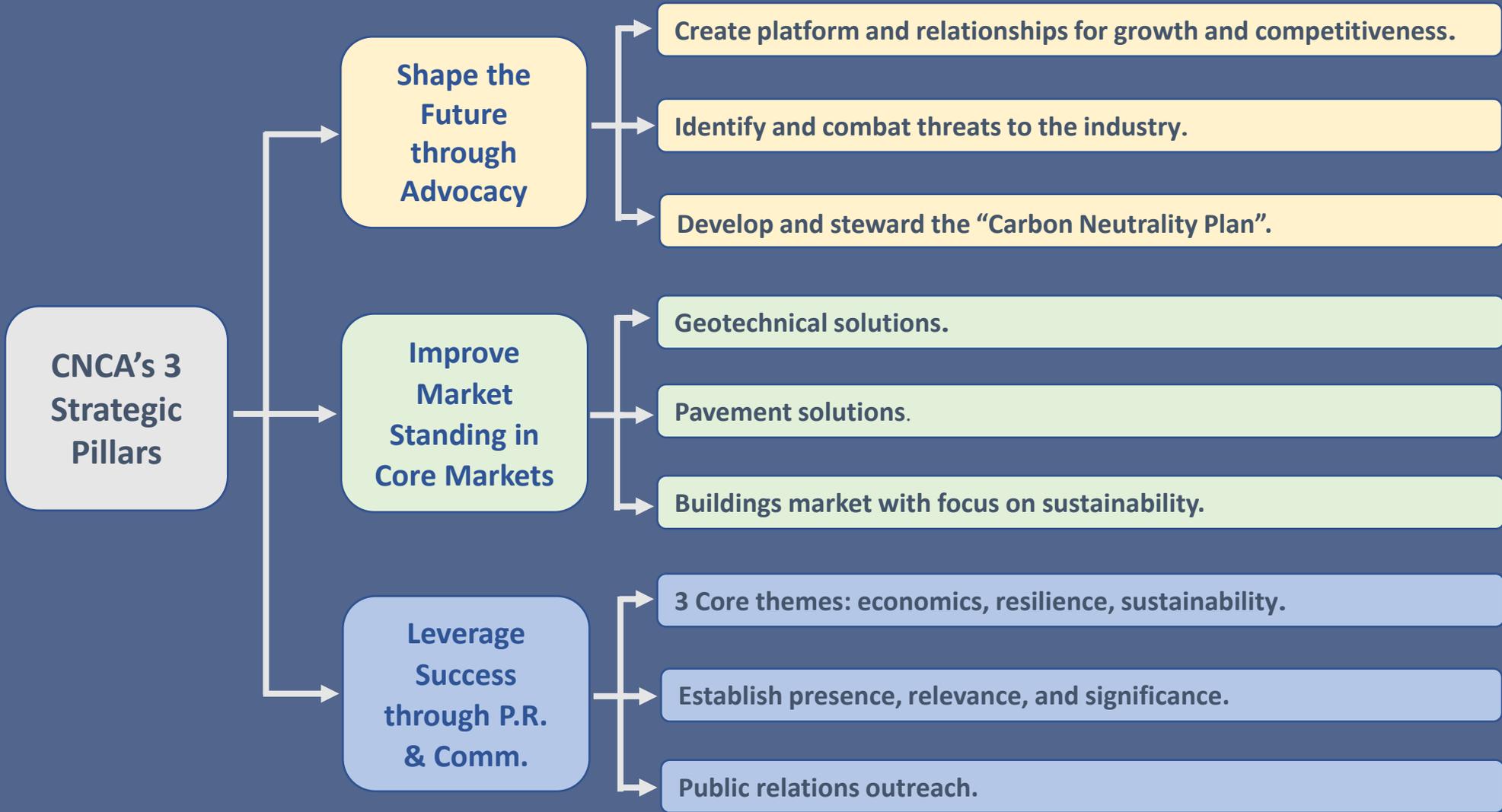
CNCA STRATEGIC DIRECTION

A PLAN FOR THE NEXT 5-10 YEARS



Guiding Principle:

The unparalleled resiliency of cement, combined with reduced carbon is ultimately leading towards concrete being the ‘no compromise’ material of choice.

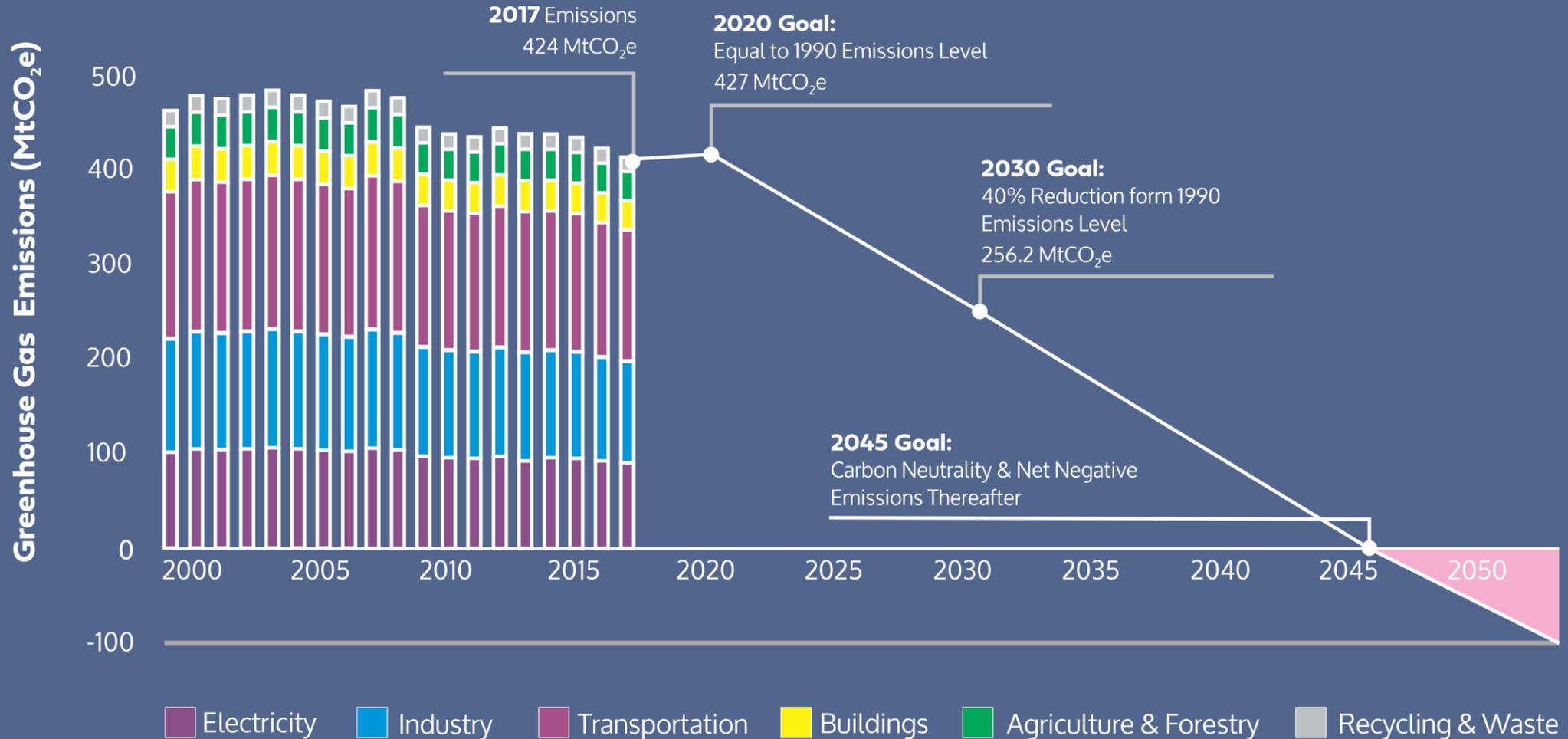




**CEMENT IS DOING
AMAZING THINGS!**

California Historic Emissions & Future Emission Reduction Targets

SOURCE: Energy Futures Initiative and Stanford University, 2020



20 Year Journey

2006: AB 32 Global Warming Solutions Act Signed



2012: Cap and Trade Program Starts / Holds 1st Auction

BUY CLEAN

2017: California Passes
1st Buy Clean Bill

**CALIFORNIA'S
CEMENT INDUSTRY
FAILING THE CLIMATE CHALLENGE**



2019: Heat is Turned
Up with NGO and
Legislative Action on
Cement

CNCA Carbon Neutrality Plan



Second Edition

Positions the industry as proactive and innovative
Takes control of the environmental narrative
Points to core stakeholders that must take actions
Builds a common reference point and language

One Bold Goal. Three Pathways. Eight Levers.

MEASURES		Legislative Assistance	Regulatory Assistance	Public Acceptance	Public Funding	RD&D	Supply Limitations
PROCESS EMISSIONS: 3 LEVERS							
Lever 1	Blended Cements			○		○	○
Lever 2	CCUS	○	○	○	○	○	
Lever 3	Alt Cements & Clinkers					○	○
COMBUSTION EMISSIONS: 3 LEVERS							
Lever 4	Renewable Natural Gas	○	○	○	○		○
Lever 5	Refuse-Derived Fuels	○	○	○			○
Lever 6	Biomass-Derived Fuels	○	○	○	○		○
ELECTRICITY GENERATION: 2 LEVERS							
Lever 7	Waste Heat Recovery	○	○		○		
Lever 8	Renewable Electricity	○	○				
		6	6	5	4	3	5

SB 596: First bill in any California sector to focus on achieving net-zero emissions



JOSH BECKER
REPRESENTING SENATE DISTRICT 13

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LATEST NEWS

California Enacts Legislation To Slash Cement Emissions

September 24, 2021

CA GOVERNOR SIGNS STATE SENATOR JOSH BECKER'S LANDMARK BILL TO DECARBONIZE CEMENT

Directs CARB to develop a comprehensive strategy to reduce GHG intensity by 40% below 2019 average by end of 2035 and achieve net-zero by 2045. Interim feasibility evaluation in 2028.

Legislative and Regulatory Actions

- **Levers:**

- ASTM C 595 Cements approved by Caltrans and others in 2021
- Waste Heat Recovery Bill passed in 2024; still needs CPUC action

- **Demand Side Initiatives:**

- Caltrans requires EPD's in 2025
- Embodied carbon limits on concrete in CALGreen building code
- Local Codes for Low Carbon Concrete
- NGO planning low carbon concrete codes in 100 cities



Bridge spanning the Cuyama River

PLC
infrastructure
projects



U.S. 101 in
Mussel Shoals /
Carpinteria

Blended Cements Outreach

- Presentations to Architects, Engineers, Agencies and Contractors
- Specification Reviews and Recommendations
- Advocacy with State Architect
- Interaction with Researchers
- Advocating for CARB to expand their definition of cement beyond clinker, gypsum, and limestone



Fly ash

Slag

Natural Pozzolans

Calcined Clays

Ground Glass

Novel Manmade SCM

2025 Decarbonization Priorities

- **Derisk Key Levers**
 - CCUS
 - Blended Cements
 - Alternative Fuels
- **Legislative & Regulatory Priorities**
 - *Maintain and Extend Cap & Trade Program beyond 2030*
 - *Keep \$83m in Budget for CCUS Regulatory Development*
 - Streamline Permitting for Decarbonization Projects
 - Lift Pipeline Moratorium



CNCA 'CEO Day' at Capitol

NGO Consensus

- Reauthorize Cap & Trade
- Revise Definition of Cement
- Hold Imported Cement to Equivalent GHG Intensity Standard (BCA)
- Allow CCUS to Count Toward Cap & Trade Emissions Obligations



July 29, 2025

Dear Rajinder Sahota, Mark Sippola, Rachel Gold, and Mihoyo Fuji:

The California Nevada Cement Association (CNCA) and members of the environmental and business communities engage in regular discussions on a wide range of issues, and every organization maintains its independence, with distinct missions and priorities. This letter reflects areas of agreement among us and should not be interpreted as one group speaking on behalf of another. Rather, it represents a shared perspective on critical issues related to decarbonizing California's cement industry.

The undersigned entities (hereafter, the "Parties") represent companies and organizations committed to the successful decarbonization of cement sold in California. The Parties strongly support the California Air Resources Board (CARB) in full implementation of SB 596, which requires that all cement sold in California achieve net-zero emission by 2045. We thank CARB for issuing the *Draft Net-Zero Greenhouse Gas Emissions Strategy for the California Cement Sector*, a crucial first step toward establishing a comprehensive roadmap to decarbonize cement in the state.

In 2021, CNCA and the environmental community joined forces in support of SB 596. The legislation was crafted to avoid emissions leakage risk, ensure full decarbonization, and promote efficient and cost-effective implementation. Since then, the Parties have continued to collaborate and identified several barriers to decarbonization that can be mitigated through regulatory changes.

A critical component of SB 596 is the state's strategy to identify the existing and new measures to overcome the market, statutory, and regulatory barriers inhibiting the achievement of these objectives. The barriers include uncertainty regarding Cap-and-Trade reauthorization, the definition of cement, emissions leakage risk through trade exposure, and emissions obligations for carbon capture.

The Parties recommend CARB act swiftly to make the following regulatory changes to address key challenges associated with cement decarbonization:

Recent Legislative / NGO Policy Initiatives

Current:

- Statewide Guidance BACT Requirements for CCUS Projects
- Establish a State Revolving Loan Fund (SRLF) to Decarbonize Cement Production
- RD&D Funding for Early Stage Decarbonization Technologies
- Modify the Cap-and-Trade Program to Better Incentivize Low-Carbon Cement Production
- Ensuring Air Quality Improvements from Investments in Low-Carbon Cement Production

Successful:

- SB 131: CEQA Reform for Infill Housing
- SB 840: \$85m in GGRF Funding for Advanced Climate Technologies

Past:

- Advanced Procurement Agreements
- Zero Emission Cement Standard

2026 Priorities

Legislative

- Funding Opportunities for Decarbonizing Cement
- Inclusion in Environmental Leadership Development Program
- CEQA Exemptions for Decarb Projects
- Life Pipeline Moratorium

Regulatory

- Implement a Border Carbon Adjustment (BCA)
- Blended Cement Definition
- Carbonation Accounting
- Credit for CCUS

Thank You

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