



ANNUAL REPORT 2025

CSC Concrete Sustainability Council

THE GLOBAL CERTIFICATION SYSTEM
FOR RESPONSIBLY SOURCED
READY-MIXED AND PRECAST CONCRETE
AND ITS SUPPLY CHAIN





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1 | Disclaimer

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Shaping the future of Concrete

Concrete is the foundation of modern society and the most widely used construction material globally. It is essential to delivering infrastructure, housing, and climate-resilient development at scale. As demand continues to grow, so does the responsibility to reduce its environmental footprint and strengthen its social and economic value. The impacts of concrete span the entire value chain, from raw material extraction to production and use, covering emissions, resource efficiency, biodiversity, and labour practices. Addressing these challenges requires a systemic, multi-attribute approach that enables measurable and verifiable progress.

The Concrete Sustainability Council (CSC) was established to meet this need through a globally recognised, third-party and independent certification system, CSC provides a robust framework to assess and improve environmental, social, and governance performance across cement, aggregates, and concrete production.

By aligning with green building frameworks and procurement practices, CSC supports the integration of responsible sourcing into decision-making and helps translate sustainability objectives into measurable outcomes.

As the sector transitions, the need for credible, scalable, and internationally applicable solutions becomes increasingly critical. CSC will continue to support this transformation, ensuring that sustainability performance is measurable, transparent, and recognised across global markets.

1 Disclaimer

This report is intended to provide general annual information for non-commercial purposes only. While every reasonable precaution has been taken to ensure that the content of this report is accurate, errors can occur. Therefore, this report is provided with no guarantees of completeness, accuracy or usefulness.

In no event will the Concrete Sustainability Council (CSC) or its external advisors or any of its Regional System Operators, members or affiliates, or any partners, sponsors or stakeholders assume liability for any decision made or action taken in reliance on the report.



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2 | Introduction

Pillars Across the Sea by Celbert Palaganas, Cebu City, Philippines

Dear Stakeholders,

As we reflect on the achievements of 2025, it is clear that this year has been one of continued growth, consolidation, and increasing global recognition for the Concrete Sustainability Council (CSC). Building on the strong foundations of previous years, CSC has further strengthened its role as a leading certification system driving sustainability across the concrete value chain.

In 2025, CSC surpassed the milestone of **1593 active certificates worldwide** and expanded its presence to **27 countries across five continents**. This growth reflects both the increasing demand for credible sustainability frameworks and the commitment of our members and partners to advancing responsible practices throughout the industry. The year was marked not only by expansion into **new markets such as Mongolia, Greece, Slovenia, and the United Arab Emirates**, but also by the renewed engagement of established CSC countries, including **the United Kingdom and Spain**, demonstrating sustained and long-term adoption of the certification system.

A key focus of 2025 has been strengthening collaboration and knowledge exchange across our global network. The **CSC General Assembly and CB/RSO Roundtables** provided important platforms to share best practices and align on future priorities. These exchanges also highlighted the maturity of the system, with notable achievements such as **BTB in Germany approaching 1000 certified plants** and **GVTB in Austria certifying more than 50 plants within a single year**.

CSC's relevance at policy level continued to grow throughout the year. In Colombia, the **Ministry of Housing, City and Territory** formally recognised CSC within updated national guidelines for sustainable construction, confirming its value as a reference framework for sustainable construction materials. In parallel, CSC further strengthened its alignment with **European sustainability frameworks**, notably through the publication of the **CSC Sustainability Report 2024 for the Dutch concrete sector** by Betonhuis. This report provides independently verified, sector-wide data on CO₂ reduction and circularity aligned with European LCA standards, positioning the Netherlands as a frontrunner in transparent, EU-aligned sustainability reporting. The publication of a national CSC sustainability report in Belgium further reflects the growing convergence of data, transparency, and policy alignment at European level.

The year also featured important milestones in regional engagement and recognition. CSC certification was officially recognised within **Saudi Arabia's Mostadam rating system**, strengthening alignment with regional sustainability frameworks. In Türkiye, a dedicated award ceremony during **Beton 2025 in Istanbul** celebrated 22 new CSC certifications achieved since 2023, while in the United Arab Emirates, **Abu Dhabi Ready Mix** became the first company to achieve CSC certification for four ready-mixed concrete plants, setting a strong benchmark for the region.

As we look ahead, 2026 will mark a significant milestone for CSC as we celebrate our **10th anniversary**. This moment provides an opportunity to reflect on the progress achieved over the past decade, while continuing to strengthen our impact, expand our global reach, and enhance the robustness of our certification system. We are also pleased to welcome **Tobias Laurens as Managing Director**, who will coordinate the next phase of CSC's development and strategic growth.

We would like to express our sincere gratitude to our members, partners and all stakeholders for their continued trust, collaboration, and commitment. Together, we are advancing the transition towards a more sustainable, transparent, and responsible concrete industry.

Yours sincerely,



Christian Artelt
Chair of the CSC

Christian Artelt



Michael Scharpf
Vice-Chair of the CSC

M. Scharpf





3 | CSC certification

© Cathedral, John Twina

3.1 Scope of certification

The CSC system is a comprehensive certification system, designed to certify production plants, with a clear focus on enhancing sustainability across the concrete supply chain. Generally, the certification applies to all products produced and supplied by the respective plant, with the exception of voluntary modules for recycling and low CO₂-concrete, which are specific to a defined range of products offered by the certified plant.

Both, ready-mix concrete plants and precast concrete plants are eligible to receive a “CSC certificate” demonstrating their commitment to sustainable practices and responsible sourcing. Cement, slag and aggregate suppliers can obtain a “CSC supplier certificate”. The supplier certificates ensure that the entire supply chain adheres to the highest sustainability standards, reinforcing the overall performance and integrity of certified concrete plants.



Fig. 3.1 CSC certification scope

3.2 Scoring & certification levels

The CSC certification system is designed to encourage continuous improvement by offering four dedicated certification levels, i.e. Bronze, Silver, Gold and Platinum.

The certification level awarded to a plant is determined through a scoring system that evaluates the plant's performance and, in the case of concrete certificates, considers the weighted average from its CSC certified cement and aggregates suppliers. In order to enter the certification process, plants must first meet all the prerequisites outlined in section 3.3. Additionally, plants aiming to certify at the level Silver or higher need to fulfill several mandatory criteria.

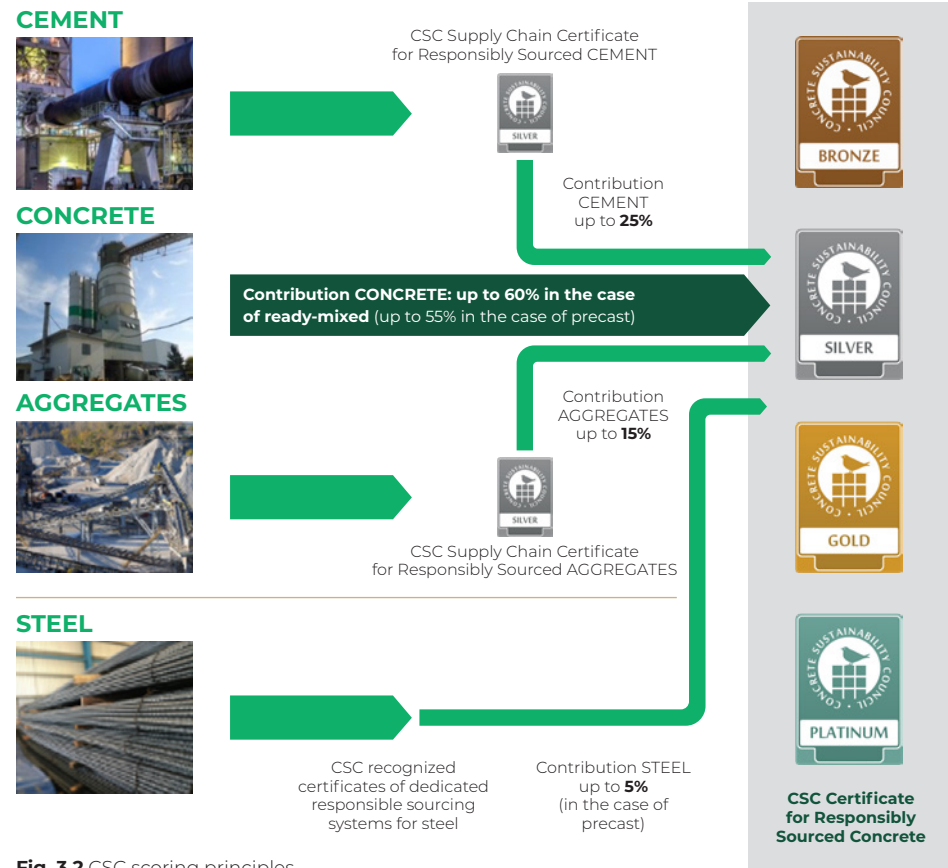


Fig. 3.2 CSC scoring principles

3 CSC certification

3.3 Content of CSC certification

Each plant undergoing CSC certification must meet a certain number of prerequisites to obtain a CSC certificate. Provided the prerequisites are fulfilled, the plant can score points in the following categories:

- M – Management;
- E – Environment;
- S – Social;
- E – Economics;
- C – Chain of custody;

An overview of the credits applicable in CSC Version 3.0 is shown in the figure 3.3. Certain prerequisites, credits or criteria only apply to the certification of a specific part of the supply chain. For example, the “P6 Vessel Evidence List” applies to Marine aggregate producers, while the “E9 Secondary fuels” criterion is specific to clinker producing plants.

Fig. 3.3 Content of CSC certification

PREREQUISITES		
P1 Ethical and Legal Compliance	P2 Human Rights	P3 Indigenous People Rights
P4 Environmental and Social Impact	P5 Traced Materials	P6 Vessels Evidence List
MANAGEMENT		
M1 Sustainable Purchasing	M2 Environmental Management	M3 Quality Management
M4 Health & Safety Management	M5 Benchmark	
ENVIRONMENTAL		
E1 Life Cycle Impact	E2 Land Use	E3 Energy & Climate
E4 Air Quality	E5 Water	E6 Biodiversity
E7 Secondary Materials	E8 Transport	E9 Secondary Fuels
SOCIAL		
S1 Local Community	S2 Health Product Information	S3 Occupational Health & Safety
	S4 Labor Practices	
ECONOMICS		
B1 Local Economy	B2 Ethical Business	B3 Innovation
	B4 Feedback Procedure	
CHAIN OF CUSTODY		
C1 Cement	C2 Aggregates	C3 Clinker
C4 Raw Aggregates Suppliers	C5 Ready Mix Concrete	C6 Steel Reinforcement
C7 Slag Supply to CSC Slag Grinder	C8 Cernent supply to CSC Cement Blender	

3.4 The “R-Module”

The R-Module enables concrete suppliers to label concrete that contains 10 vol.-% (or more) of recycled, secondary or reclaimed aggregates. The R-Module is available for CSC-Silver (or higher) certified concrete plants and rewards maximizing the use of recycled material in fresh concrete. This is incentivized through a “Star” system which was introduced with the CSC R-Module Version 2.1.

The CSC R-Module is visually represented on the certificate by a supplementary “R” label, along with the number of stars awarded, reflecting the maximum level of recycled material incorporated into the concrete supplied from a given plant.



Fig. 3.4 R-Module certification content and star system

3.5 The “CO2-Module”

The CO2-module enables concrete suppliers to label CO₂-optimized concrete that achieves a reduction in GHG emissions [kg CO₂ eq per m³ of concrete] of at least 30% when compared with a regional CEM I / OPC based reference mix of a given strength class. The CO2-module is available for CSC-Silver (or higher) certified concrete plants. The CO2-module is not considered an EPD (Environmental Product Declaration), as it integrates performance levels into material specific CO₂ values relative to a regional benchmark.

The CSC CO2-module is awarded in the form of a “Star” system ranging from one to four stars. The color (Silver, Gold, Platinum) of the CSC CO2-module is the color of the main CSC certificate held by the concrete plant supplying the low CO₂-concrete. This system recognizes and incentivizes plants that achieve significant reductions in carbon emissions.

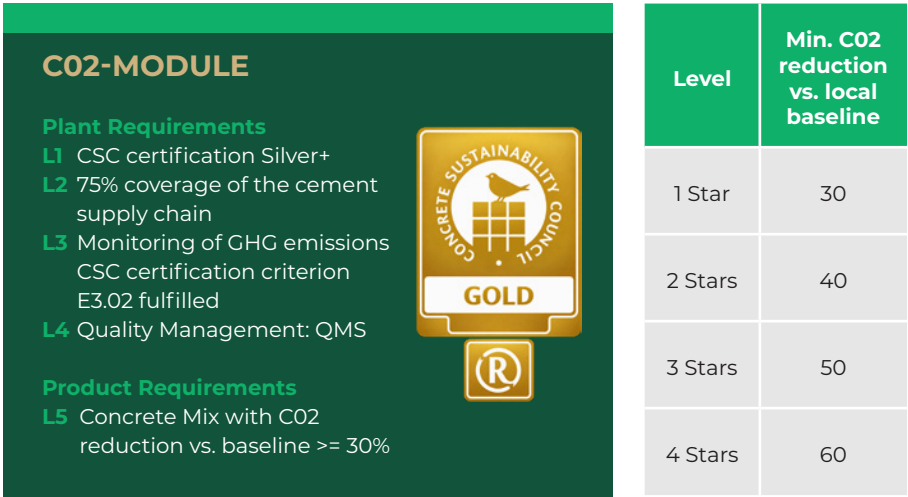


Fig. 3.5 CO2-module certification content & star system



3.6 Supporting the implementation of the United Nations' Sustainable Development Goals (SDGs)

CSC certification takes a comprehensive and integrated approach, requiring concrete plants to comply with five fundamental prerequisites and a broad range of social and environmental performance indicators. These include “Occupational Health & Safety”, “Labor practices”, “Land use”, “Energy & climate”, “Air emissions”, “Water”, “Biodiversity”, “Secondary materials”, and “Transport”. By addressing these issues, CSC Cer-

tifications contributes to the broader implementation of the United Nations' Sustainable Development Goals SDGs within the concrete sector and its supply chain.

The CSC Certification framework actively supports the achievement of multiple SDGs, both directly and indirectly. In particular, the following goals are specifically addressed:

-
- **SDG 3: Good Health and Well-being** – Promoting healthier working conditions and safer environments.
 - **SDG 6: Clean Water and Sanitation** – Ensuring efficient water use and management practices.
 - **SDG 7: Affordable and Clean Energy** – Encouraging energy efficiency and the adoption of renewable energy sources in production processes.
 - **SDG 8: Decent Work and Economic Growth** – Fostering fair labor practices and promoting long-term economic growth within the industry.
 - **SDG 9: Industry, Innovation, and Infrastructure** – Supporting sustainable industry practices and innovations that improve infrastructure resilience.
 - **SDG 10: Reduced Inequalities** – Reducing inequalities within communities and the workforce by promoting inclusive practices.
 - **SDG 11: Sustainable Cities and Communities** – Contributing to the creation of sustainable and resilient urban environments through responsible building practices.
 - **SDG 12: Responsible Consumption and Production** – Encouraging resource efficiency and minimizing waste through responsible production processes.
 - **SDG 13: Climate Action** – Reducing the carbon footprint of concrete production through sustainable practices and innovation.
 - **SDG 14: Life Below Water** – Minimizing the impact of industry activities on aquatic ecosystems.
 - **SDG 15: Life on Land** – Promoting sustainable land use and biodiversity conservation.
 - **SDG 16: Peace, Justice, and Strong Institutions** – Ensuring ethical business practices, transparency, and strong governance structures within the concrete sector.
-

Through its rigorous certification process, CSC not only encourages compliance with these critical social and environmental

standards but also plays an active role in advancing the global sustainability agenda across the concrete industry.



Fig. 3.6 The CSC system's coverage of the SDGs



4 | Credibility of the CSC certification

The aim of the CSC is to achieve a positive impact on the social, environmental and economic practices of concrete, cement and aggregate producers. Therefore, the CSC certification system is based on worldwide recognized credibility systems that define our core values.¹

1. Sustainability Impacts

The CSC certification system aims to promote responsible practices throughout the concrete value chain, i.e. amongst concrete, cement and aggregate producers.

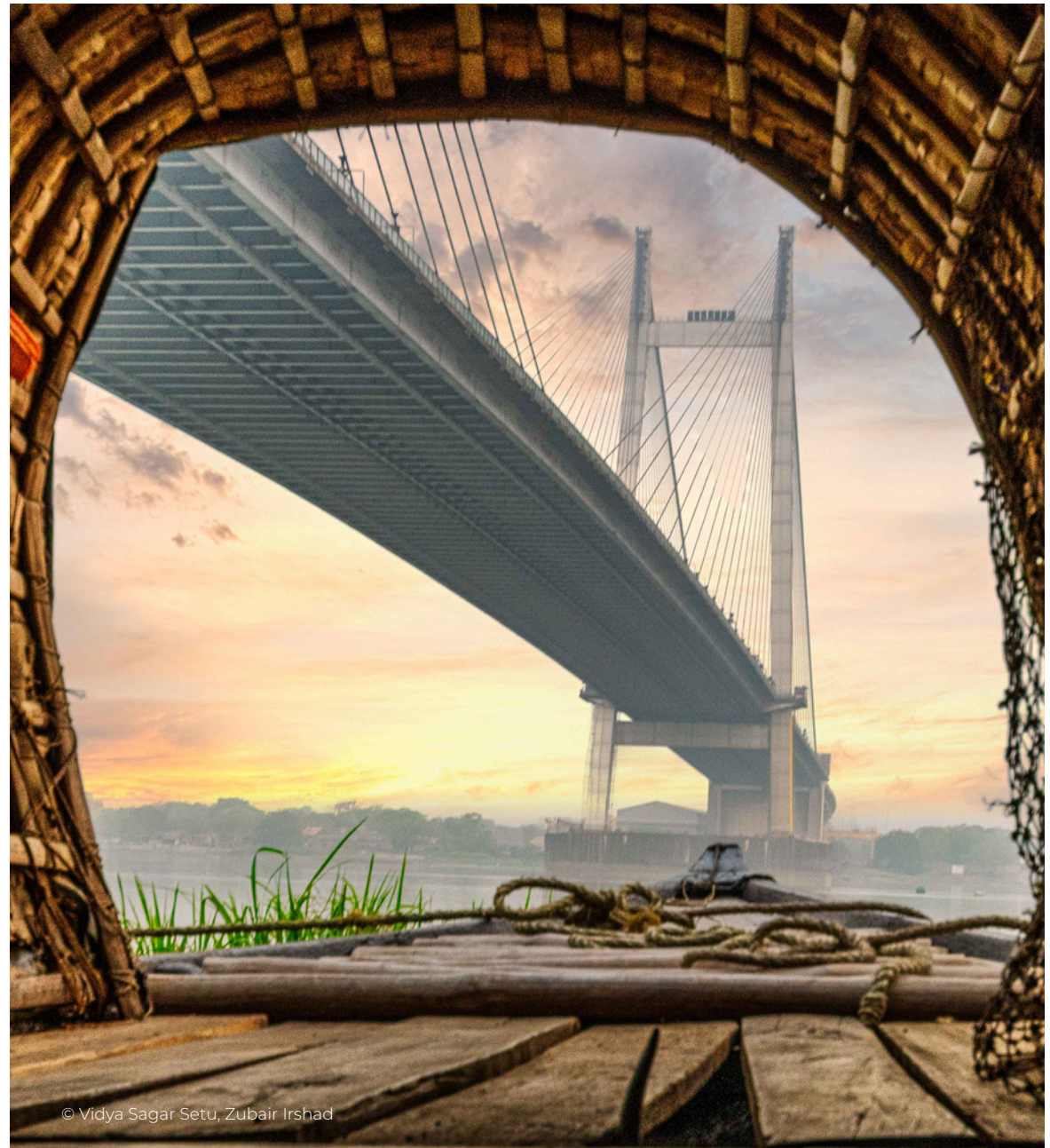
This is achieved by driving the CSC's key objective, i.e. providing positive social, environmental and economic impacts to producers, nature and society. For this reason, sustainability topics where responsible practices can make a material difference are in the spotlight of CSC certification. Material topics covered by the certification system were identified with the support of a broad range of internal and external stakeholders and include:

- Human rights, compliance, health and safety, labor practices, and engagement with local communities as social key-topics;
- Life cycle impact assessment, energy and climate, air quality, water, land use, biodiversity, recycling and use of secondary materials including fuels, and transportation as most material environmental topics;
- Local economy, ethical business practices, and innovation as most relevant economic topics.

2. Collaboration

The CSC is convinced that collaboration is very impactful to create change and therefore embraces engagement and partnerships with stakeholders inside and outside the concrete value chain, including non-for profit- and civil society organisations. This is why the CSC is working in close collaboration with sector associations and also engaged with a broad range of external stakeholders including Green Building Councils, the Decarbonisation Leaders' Network Decarb Connect, the Global Alliance for Buildings and Construction Global ABC, and ISEAL.

¹) ISEAL 10 Credibility Principles. CSC adopted the ISEAL Credibility Principles since its foundation and has updated them now according to version 2 of ISEAL principles.



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4 Credibility of the CSC certification system

3. Value Creation

CSC certification is aligned with different ISO standards, namely ISO 14001, ISO 18001, ISO 9001, ISO 26000, and ISO 50001. This alignment facilitates an efficient certification process for companies that already operate under these frameworks, while ensuring consistency with internationally recognized best practices.

CSC continuously seeks to create value by ensuring that the efforts and resources invested by companies in responsible sourcing are recognized in the market. This is achieved through increasing alignment with green public and social procurement frameworks, as well through recognition in leading green building and infrastructure rating systems such as

- BREEAM, DGNB, LEED, ÖGNI, ENVISION, CASA, B.E.S.T., SGNI, Mostadam;

CSC's recognition in Green Building Labels plays a key role in advancing sustainability in the built environment. CSC has been recognized by several leading green building certification systems globally, enhancing its credibility and visibility.

This recognition allows our certified plants to demonstrate their commitment to sustainability in line with the criteria of major green building standards. Through these recognitions, CSC certification enables concrete, cement and aggregate producers to demonstrate verified sustainability performance in a way that is aligned with evolving market expectations. This not only supports transparency and comparability across the value chain, but also helps position certified companies more strongly in projects where sustainability criteria are increasingly decisive.

In this way, CSC contributes to bridging the gap between sustainability performance and market uptake, ensuring that responsible practices are not only implemented, but also valued.

Fig. 4.0 The CSC system's recognition

RECOGNITION IN GREEN BUILDING LABELS

CSC's recognition by green building labels enhances the value of certified concrete in sustainable construction. It ensures alignment with global standards, promoting transparency and credibility in the concrete industry's sustainability efforts



LEED | United States and many countries

Recognition in LEED v5 as contributor to the frameworks "Multi-attribute MRc4 and MRpc181"



BREEAM | UK, Europe

Recognition in the "Responsible sourcing of construction products" credit



Envision | North America, World

Recognition in certification system by the Institute for Sustainable Infrastructure (ISI)



DGNB | Germany and many countries

Recognition in the "Responsible sourcing" credit



ÖGNI | Austria

Recognition in the "Responsible sourcing" credit



MOSTADAM | Saudi Arabia

Recognition across the Commercial, Residential, and Communities D+C manuals, for responsible sourcing, recycled materials, and CO₂ reduction.



B.E.S.T. | Turkey

Recognition in the "Ecological and Sustainable Design" residential certification system



CASA Guatemala, CASA Colombia | LATAM

Recognition in the "Materials" category



SGNI | Switzerland

Recognition in the "Materials" category

4 Credibility of the CSC certification system

4. Measurable Progress

With its “toolbox” the CSC possesses a tool to track progress on achieving its sustainability objectives, i.e. providing positive social, environmental and economic impacts to producers, nature and society. Progress is measured annually by means of analysing the credit fulfillments rates of the plants that underwent CSC certification during the past 12 months.

Key-insights of this in-depth analysis are shared with the general public as part of the organization’s annual report and provide tangible input to the annual certification system review process.

5. Stakeholder Engagement

The CSC recognizes the value of inclusive and non-discriminatory stakeholder engagement. This is why the CSC created a broad range of approaches and opportunities for stakeholders to express views, to participate in the system development as well as in the general decision making process.

The CSC offers full membership to civil society organizations free of any charge and with this access to the CSC’s executive committee. The CSC also created an advisory committee as a platform for in-depth exchanges with academia and non-for-profit associations and implemented a collaborative approach for updating the CSC certification system, i.e. with in-depth involvement from internal stakeholders such as enterprises, industry associations, CBs and external stakeholders i.e. CSOs, labor organizations, green building councils (GBCs) and academics.

Fig. 4.1 The CSC system’s stakeholders engagement matrix

STAKEHOLDERS ENGAGEMENT AND HOW WE COMMUNICATE



6. Transparency

Information on the CSC is easily accessible via its webpage www.csc.eco. The website provides in-depth documentation of the CSC certification system, as well as information on progress through the annual report. It also offers transparent insights into governance aspects, including the grievance mechanism and certification body audit findings, and includes a contact form to reach the CSC helpdesk. For any additional information or clarification, stakeholders are encouraged to contact the CSC directly via the general information email info@csc.eco or helpdesk helpdesk@csc.eco

7. Impartiality

The CSC has a broad range of internal and external stakeholders comprising producers, industry associations, certification bodies, academia, Green Building Councils and others. Impartiality is ensured by the organization's Governance, namely:

- A General Assembly (GA) with equal voting rights for all full members;
- An executive committee (ExCo) with appropriate representation of all internal stakeholders;
- The CSC Advisory Committee providing the direct voice of social and environmental stakeholder organizations;
- And a dedicated grievance management procedure applicable to all stakeholders.

8. Reliability

The CSC has made available for plants undergoing CSC certification the so-called CSC toolbox. The CSC toolbox is a web-based certification tool that provides its users with a clear structure and guidance when uploading certification evidence to support their claims.

The submitted evidence undergoes third-party verification by trained, CSC accredited certification bodies before a certificate is issued, provided that the evidence is deemed valid, including verification during an on-site audit.

To ensure the quality and consistency of certification activities, CSC conducts oversight of certification bodies, including audits of their audit processes.

CSC-accredited certification bodies must be certified according to ISO 17021 and/or 17065. They are required to demonstrate responsibility, impartiality, confidentiality and openness, responsiveness to complaints and appeals, and must possess technical knowledge of aggregate, cement and concrete production.

9. Truthfulness

It is of utmost importance for the CSC that claims and communications in relation to the CSC certification system are accurate, transparent, and trustworthy. To support this, the CSC toolbox provides a publicly available list of all active CSC certificates. Certificates can be downloaded and include key information such as the certification body, validity period and achieved scores across the different sustainability categories.

In addition, the CSC has established a robust framework of dedicated measures to ensure the integrity of claims and to maintain confidence in products from CSC certified plants:

- CSC requires that all claims and communications related to CSC certification, including the use of the CSC logo comply with the relevant CSC guidance document;

- A dedicated procedure is in place to report misleading claims, misuse of the CSC trademark and logo;
- CSC conducts regular monitoring of CSC logo and trademark use, including targeted online checks. CSC reserves the right to take appropriate action, including legal measures, in case of false/deceptive claims or misuse of the CSC trademark

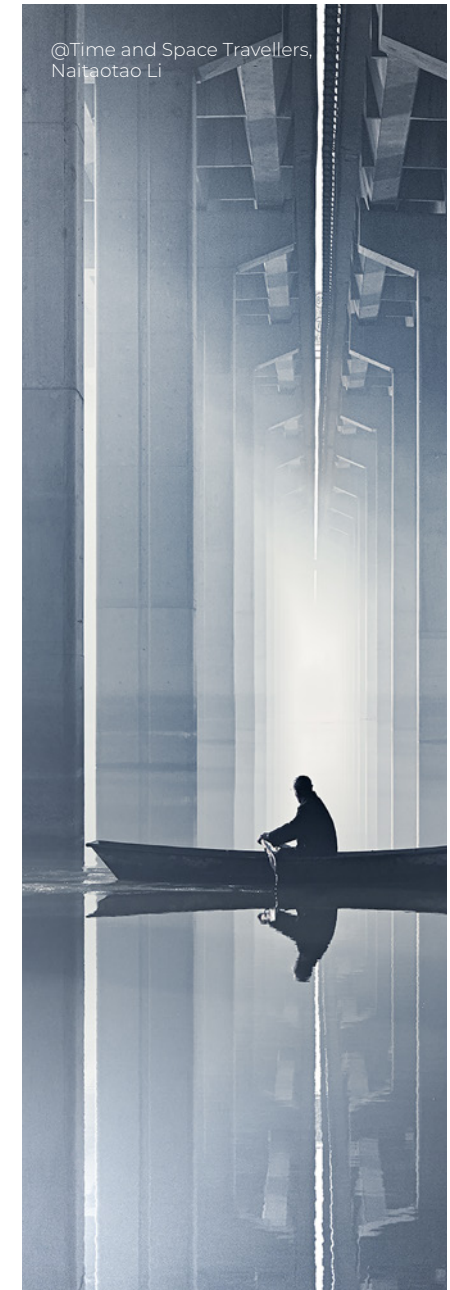
10. Continual Improvement

It is important for CSC to regularly review its objectives, strategies and the overall level of ambition of the CSC certification system. This ensures that stakeholder input is continuously integrated and that the system evolves in line with emerging and advancing responsible sourcing practices.

This is achieved through a range of dedicated measures, including:

- Regular discussions with the CSC Technical Committee and with key internal stakeholder groups, including Regional System Operators (RSOs) and Certification Bodies (CBs);
- Proactive collection of feedback from key-stakeholders' on an annual basis;
- Ongoing exchanges with Green Building Councils;
- Exchanges with companies undergoing certifications and existing certificate holders;
- Stakeholder events with CSC Advisory Committee, Civil Society Organizations, and Labor Organizations.

Together, these processes support the continuous improvement of the CSC system and lead to regular updates, with major revision undertaken at least every three years.



An aerial photograph of a city grid, likely New York City, with a star shape highlighted in the bottom left corner. The star is formed by the intersection of several major streets. The rest of the image is a solid dark green color.

5 | CSC in numbers system

@ The star from above, Azim Khan Ronnie

5.1 2025 Performance Indicators

In 2025, the number of annual certifications continued its upward trajectory, reaching a record high of 635 compared to 619 in 2024, representing a 3% year-on-year increase. This sustained growth reflects the industry’s deepening commitment to enhanced sustainability standards and formal recognition. Expansion was primarily driven by a strong growth in Germany, the Netherlands, Belgium, Austria and Poland.

By the end of the year, CSC certificates were present in 27 countries, up from 24 in 2024, with 1593 plants holding active CSC Certificates (2024: 1297). During the year, certification activities expanded into new markets, including Greece, Mongolia, the United Arab Emirates and Slovenia further advancing the uptake of responsibly sourced concrete worldwide.

In terms of certificates by product category, 511 concrete plants were certified in 2025 (2024: 470), alongside 96 aggregate production sites (2024: 96) and 28 cement plants (2024: 53). A total of 126 CO2 module certificates was awarded (2024: 110), supporting the reduction of life cycle emissions. In addition, 75 R-module certificates were issued (2024: 85) contributing to increase circularity in concrete production processes.

CSC is proud to collaborate with more than 874 producers globally, all committed to advancing sustainable practices. The system is further strengthened by 41 members, including 20 accredited certification bodies, that deliver independent CSC audits and ensure the robustness and credibility of the certification process. CSC’s expanding global footprint underscores its ongoing commitment to advancing sustainable practices across the concrete industry worldwide. Through this collective effort, CSC continues to drive the uptake of measurable, verifiable sustainability performance.

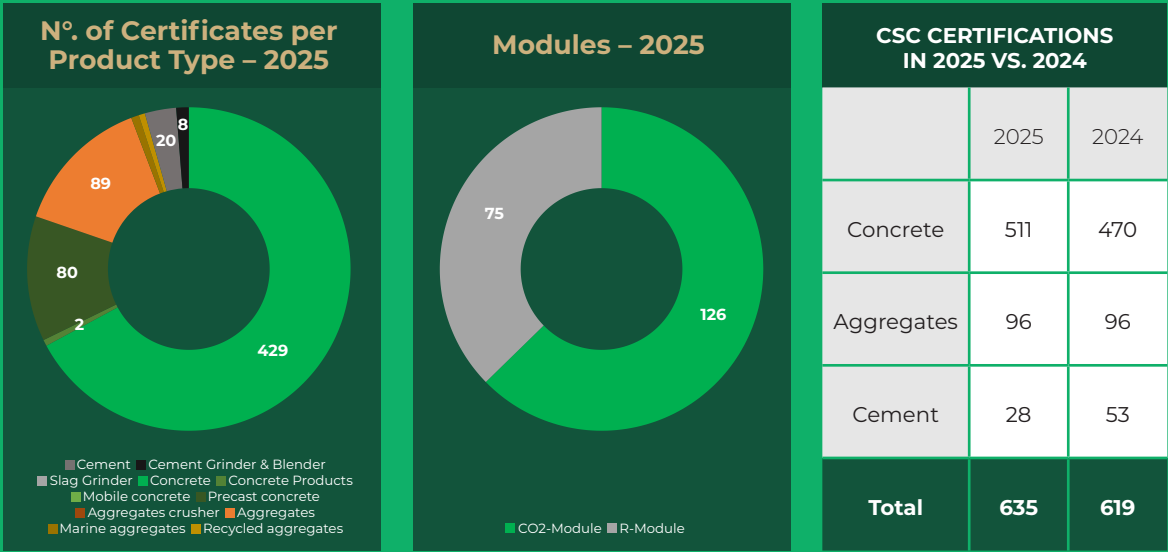


Fig. 5.0 2025 performance indicators

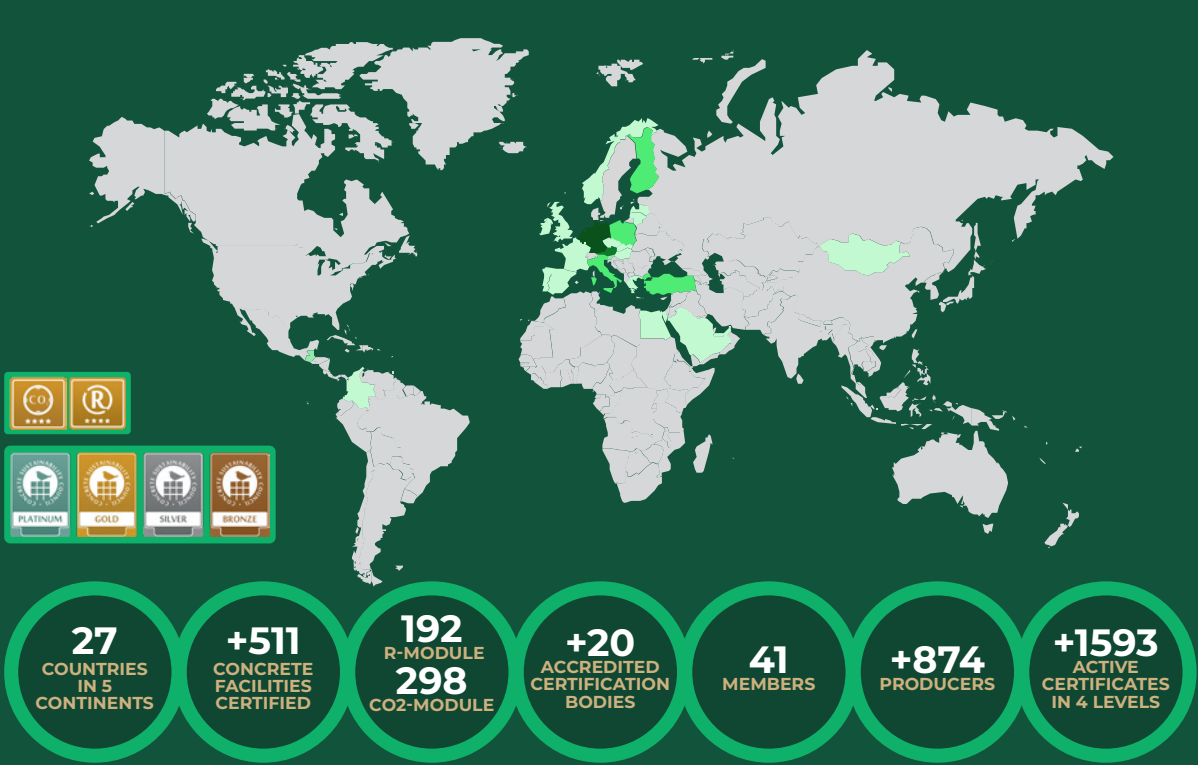


Fig. 5.1 CSC performance indicators dashboard

5.2 CSC-certifications

The 2025 results reflect a transition from system maturity to performance improvement, with annual certifications reaching a record high of 635 (see Table 5.2)

511 out of the 635 certificates (≈80%) issued in 2025 were awarded to concrete plants, 429 of them to plants producing ready-mix concrete, 2 mobile concrete plants and 80 to precast concrete plants.

Additionally, 96 supplier certificates (≈15%) were awarded to aggregate production sites, including 3 to recycled aggregates plants and 4 to marine aggregates.

Meanwhile, 28 supplier certificates (≈5%) were awarded to cement plants, 8 of these to cement grinding and blending plants.

The 635 CSC certifications awarded in 2025 were spread across multiple countries, with 440 in Germany, 59 in the Netherlands, 59 in Belgium, 32 in Austria, 8 in Turkey, 4 in Italy, 12 in Poland, 7 in Slovenia, 4 in UAE, 4 in Mongolia, 3 in Greece, 1 in Portugal, 1 in Spain, and 1 in the UK. In 2025, certificates were issued in 4 additional countries compared to 2024. Considering that already by 2024, certificates were issued in 10 new countries, namely the Czech Republic, Hungary, Egypt, France, Latvia, Ireland, Luxembourg, Saudi Arabia, and Guatemala, this is a significant development and increased the number of active certificates to 1593.

The Netherlands shows the highest concrete market penetration, followed by Germany, Belgium, and Austria.

Certification is gaining critical importance for cement, the component with a high environmental footprint: while all cement grinding plants in The Netherlands and nearly all cement plants in Germany, Belgium, and Austria are already CSC certified, significant progress is also being made in the Netherlands, Italy, and Turkey.

Year*	Cement	Cement Grinder & Blender	Slag Grinder	Concrete	Concrete Products	Mobile Concrete	Precast Concrete	Aggregates crusher	Aggregates	Marine Aggregates	Recycled Aggregates	Grand Total
2017	4			54					5			63
2018	21			39			11		3			74
2019	11			87			1		27		3	129
2020	12	3		127		1	11	2	34		2	192
2021	32	2		138		1	18		45	4		240
2022	10	4		227	3		16		27	4	3	294
2023	19	5	1	262	16		41		57	1	3	405
2024	40	13		373			97		92	1	3	619
2025	20	8		429		2	80		89	4	3	635

Table 5.2 Number of certificates issued per year and per segment

Share of CSC-certified plants per product type per country - 2025

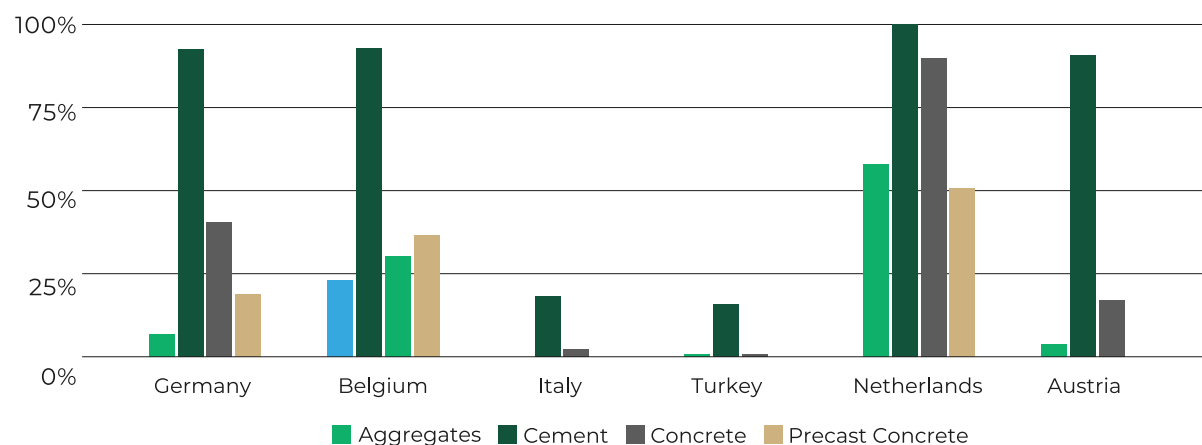


Fig. 5.3 Share of CSC-certified plants per market segment and country

5.3 CSC R-Module certifications

In 2025, 75 R-Module certifications were issued, bringing the total number of R-module certificates to 192 vs. 172 in 2024. Of the 192 active R-Module certificates, 151 are in Germany, 37 in the Netherlands and 4 in Austria. This growth highlights the expanding adoption of sustainable resource management practices across the sector. .

5.4 CSC CO2-Module certifications

In 2025, 126 CO2-module certifications were issued, reflecting the industry's ongoing commitment on quantifying and reducing carbon emissions in concrete production. By the end of 2025, the total number of active CO2-module certificates reached 298 (2024: 289), with 242 in Germany, 31 in the Netherlands, 22 in Belgium, 2 in Austria and 1 in Luxembourg.

R-Module Certificates – valid (excluding expired)

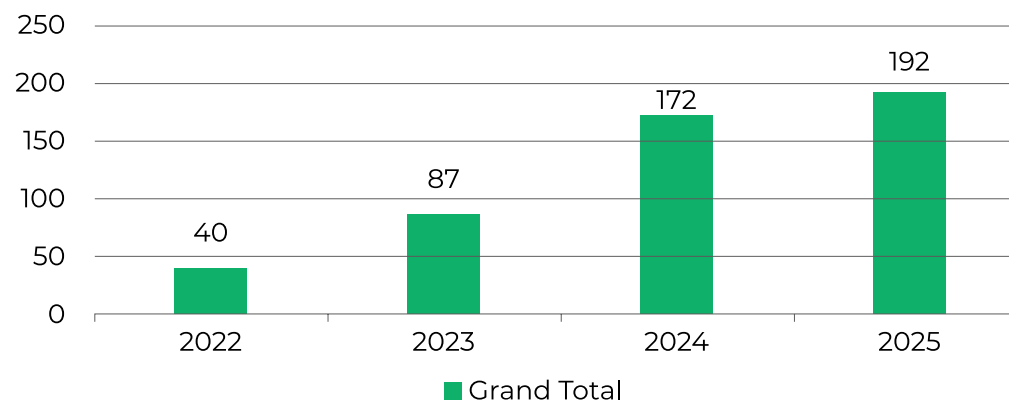


Fig. 5.4 Total active R-Module certificates at the end of each year

CO2-Module Certificates – valid (excluding expired)

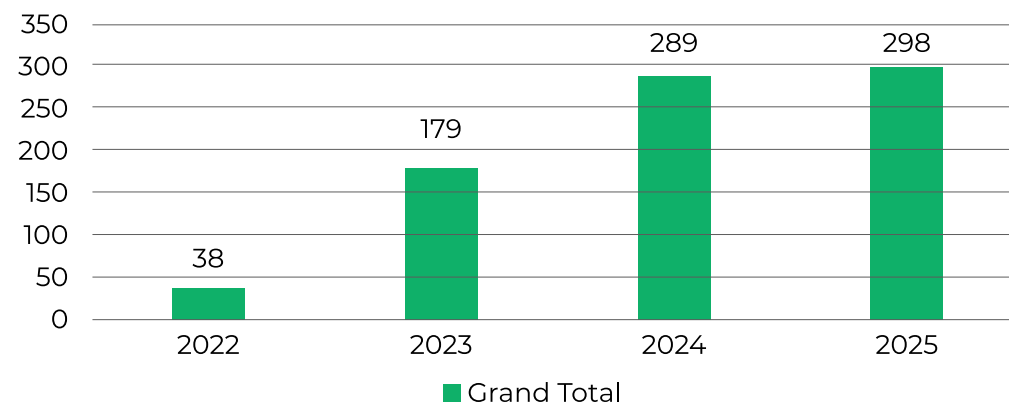


Fig. 5.5 Total active CO2-module certificates at the end of each year



6 | Certificate holders' responsible sourcing impact

© Innocence among the silent, Christopher Andres

6 Certificate holders' responsible sourcing impact

This section provides an overview of the achievements of plants certified in 2025 under the latest CSC system version 3.0. The data offers insights into the implementation of sustainability practices within the concrete, cement and aggregate sectors, highlighting industry trends and areas for improvement. Additionally, these findings help to guide future updates of the CSC certification system, ensuring continuous advancement in responsible sourcing and sustainable production.

6.1 Overview of key-findings and developments

Across all product segments, 2025 showed steady improvement in policy adoption, management systems and disclosure. Social and economic criteria remained strong, and the main opportunities for further progress related to external verification, certified management systems, renewable energy, low-emission transport and measurable decarbonization outcomes.

The sector is therefore moving from policy maturity toward verified performance. Commitments are broadly in place, but implementation gaps persist where third-party assurance or capital-intensive decarbonization measures are required. In 2025, the dominant trend was stabilization and incremental improvement rather than regression.

The 2025 results indicate that the sector has established a strong foundation of governance frameworks and policies. Future differentiation will be driven by:

- Verified outcomes followed by the stated commitments;
- Acceleration of decarbonization measures;
- Expansion of renewable energy sourcing and low-emission logistics;
- Conversion of mature systems into certified management standards.

CSC certification continues to serve as a pivotal framework supporting this transition, enabling concrete, cement, and aggregate producers to strengthen performance, enhance transparency, and align with evolving sustainability expectations.

In the same way, in terms of performance improvement based on the results obtained by the certified plants, the Cement sector made the strongest YoY progress, particularly in climate go-

vernance and reporting, reinforcing its central role in advancing decarbonization across the value chain. Future performance improvements will increasingly depend on the pace of emissions abatement, alternative fuels, and energy transition investments.

Biodiversity performance continues to strengthen across all product groups, with certified aggregate quarries showing particularly strong results. Additionally, the utilization of low-emission trucks remains low at only 27% partial utilization in concrete and aggregates and 74% partial utilization in cement and the share of renewable electricity used by certified plants stands at 22-28%, both highlighting opportunities to accelerate sustainable energy transition and reduce emissions from transport and operations.

Overall, the substantial progress made along many certification criteria highlights the sector's ongoing journey toward more sustainable practices. CSC remains committed to supporting producers in this journey, enabling continuous improvement and helping translate ambition into measurable impact.

CSC will continue to play a central role in this evolution, providing a robust, credible, and globally recognised framework to support the sector in delivering measurable progress. Together, we shall continue to build a more sustainable, resilient, and responsible concrete industry for generations to come.

Category	Cement	Concrete	Aggregates
Prerequisites	100%	100%	100%
Management	90%	74%	73%
Environmental	86%	79%	79%
Social	94%	91%	94%
Economics	91%	88%	89%
C1 Cement		97%	
C2 Aggregates		45%	

Table 6.1: Key findings





Management

• From 2024 to 2025, the sector demonstrated consistent improvement, reflecting a broad uplift in governance and process maturity across certified plants. The certified plants show a stronger responsible sourcing governance, broader policy coverage, higher training and procurement ESG integration, improved base EMS/QMS/H&S system presence and better internal KPI publication.

• In 2025, 99% of all certified plants had a purchasing policy in place, additionally over 96% of these plants actively incorporated responsible sourcing criteria into their procurement process.

• Furthermore, more than 98% of CSC certified plants had a documented management system in place, addressing environmental-, quality- and health and safety aspects. However, applying certified Management Systems remains an area for further development in some plants.

• Throughout 2025, certified plants continued to demonstrate high management and governance maturity, with most ma-

nagement criteria maintaining achievement levels close to full compliance. Year-on-year improvements were primarily observed in transparency, disclosure, and external verification, rather than in foundational system adoption, which was already well established in 2024.

• Overall, achievement ratios on management performance in 2025 reflect a shift from policy and system maturity toward improved credibility and transparency. Despite these advances, certain areas still require focused attention and further progress.



Social

• In 2025, the vast majority of CSC-certified plants maintained very high and stable performance across health & safety systems, community safety and worker protections, reinforcing a strong commitment to social responsibility, with some improvements in communication, risk analysis, and preventive actions.

• Moreover, it has become standard practice for all facilities to implement corrective actions based on recorded incidents, actively fostering safer work en-

vironments. Additionally, certified plants continue to strengthen community engagement, uphold ethical labor regulations, and promote a culture of well-being and safety among employees.



Environmental

• In 2025, more than 85% of aggregates and concrete plants and 100% of cement plants undergoing CSC-certification, contributed to sectoral environmental product declarations (EPDs), reinforcing transparency and environmental accountability across the industry.

• Nearly all certified plants have implemented climate, water and transport policies as well as measures to avoid operations in globally or nationally important sites.

• Policy adoption and monitoring performance remain strong: Climate policy, pollution protection, water management, dust reduction, use of secondary materials, biodiversity and land use protection are consistently >90% achieved demonstrating a strong, long-term commitment to protecting nature and ecosystem restoration.

• Disclosure and external verification improved in Concrete and Aggregates, as for example public reporting of GHG emissions and externally verified GHG reporting. All certified cement plants are also reporting to the GNR database.

• Reducing energy consumption and creating awareness remain key priorities, with widespread implementation across certified facilities.

6.2 Concrete producers

In 2025, a total of 511 concrete plants were awarded with a Bronze, Silver, Gold or Platinum CSC certificate compared to 470 certified plants in 2024. Among these, 429 plants (≈84%) from the total number of certified concrete plants were ready-mix concrete plants, 80 were precast plants (≈16%) and 2 were mobile plants certified in 2025. Certified concrete companies continue to demonstrate steady progress in procedural and governance maturity, especially in sourcing and Quality Management Systems (QMS). However, implementation remains less mature in the certification of Environmental Management Systems (EMS) and Health & Safety Management Systems (H&SMS).

6.2.1 Management criteria

Certified concrete companies demonstrate a high level of governance maturity. However, further progress is becoming more incremental, as future differentiation will depend less on policy adoption and more on the delivery of verified outcomes. In this context, certified management systems remain as the key lever for continued improvement. Fig. 6.1 provides insight into the achievement of manage-

ment related certification criteria in 2025 compared to 2024:

Fig. 6.1 shows that responsible sourcing criteria improved clearly in 2025, with nearly 90% full achievement across M1 indicators. Documented EMS, QMS and H&SMS remained consistently high, while certified systems progressed more slowly. KPI transparency also improved: publication increased from 48% to 66%, while externally verified KPIs rose from 54% to 69%.

2024 Concrete: Management criteria - ratio of criterion achievement

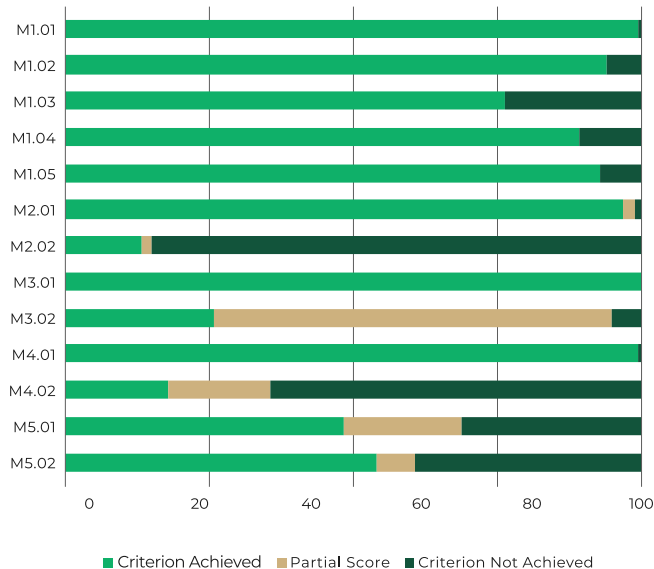
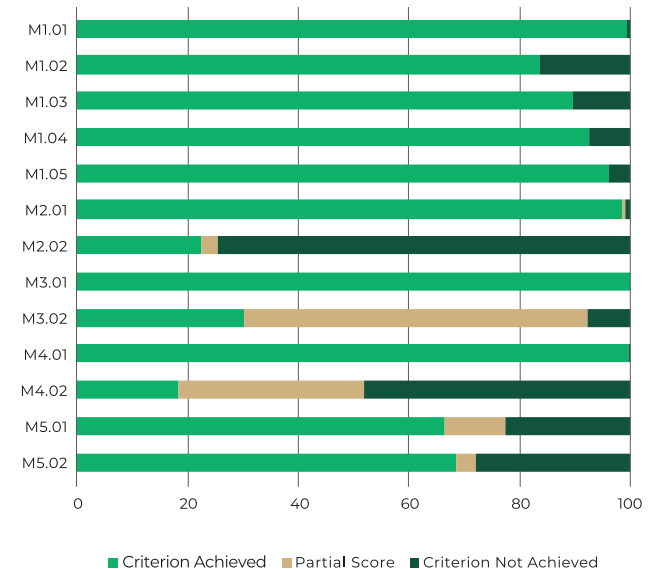


Fig. 6.1 Concrete: Management criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum).
Data: 2024 vs. 2025, Version 3.0



2025 Concrete: Management criteria - ratio of criterion achievement



6.3.2 Environmental criteria

The overview of the environmental criteria indicates a growing environmental performance across LCA, energy and climate, water, secondary materials and transport. Sectoral EPDs and product-specific carbon reporting reached 87% and 88%; climate policy, energy-saving awareness and clean-air silos were close to full achievement. Water scarcity and impact reached 100%, verified water

reporting improved to around 60%, and all certified concrete plants responsibly processed returned concrete. The low-emission transport credit remains underperforming, with more than 70% of plants not yet using low-emission transportation modes.

Figs. 6.2 - 6.6 provide an overview on the achievement ratio of environmental certification criteria in 2025 compared to 2024 for concrete producers.

Within the concrete industry, the practices of conducting sectoral environmental product declarations and reporting of product specific carbon emissions to customers are becoming increasingly prevalent. In 2025, these activities achieved fulfillment rates of 87% and 88% respectively, reflecting a strong commitment to understanding and reducing environmental impacts.

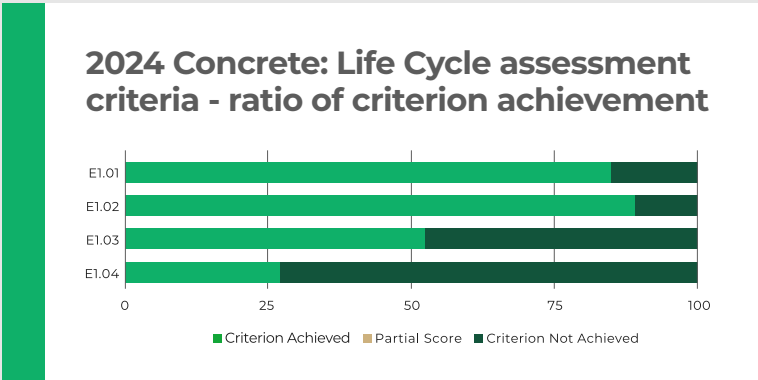
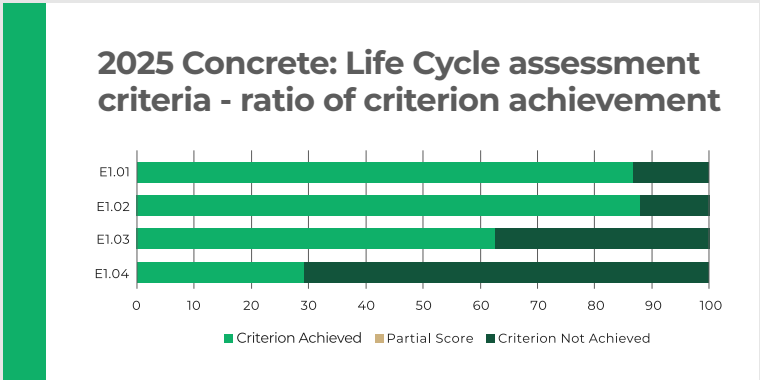


Fig. 6.2 Concrete: Life Cycle assessment criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum).
Data: 2024 vs. 2025, Version 3.0

Sectoral environmental product declaration
Reporting of product specific carbon emissions to customers
Release of environmental product declarations (EPDs)
(EP) Release of environmental product declarations (EPDs) on plant level



The vast majority of plants undergoing CSC certification in 2025 have implemented policies to avoid adverse effects on globally or nationally important sites, a climate policy, created energy savings awareness and have clean air silos in place, with fulfillment rates of 94%, 99%, 99% and 99% respectively. Improvements in the Energy & Climate criteria are mainly in the credits related to GHG monitoring and reduction.

In 2025, Concrete producers continue to comply with water related certification requirements. Water scarcity and impact was fully achieved by all certified plants (2024: 97%). Verification of water reporting was performed by around 60% of the plants undergoing certification, which represents a significant improvement of +14% compared to the previous year (2024: 46%).

2024 Concrete: Energy & Climate criteria - ratio of criterion achievement

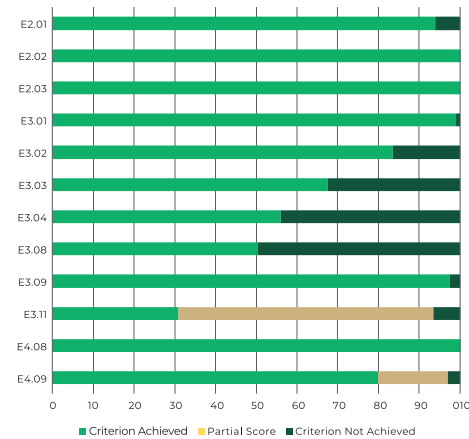
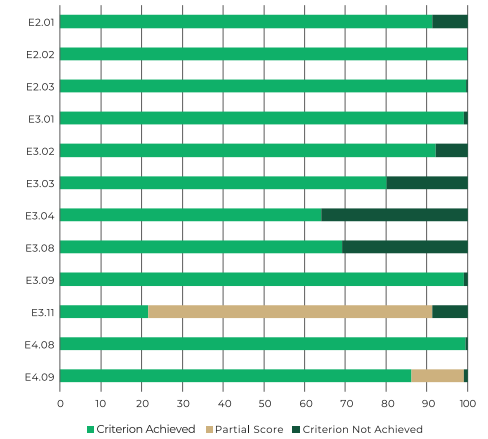


Fig. 6.3 Concrete: Energy & Climate criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025, Version 3.0

- Policy to avoid globally or nationally important sites
- Responsible land use
- Protection from pollution
- Climate policy
- Monitoring of GHG emissions
- Public reporting of monitoring results
- Externally verified reporting of GHG emissions
- Achievement of CO2 emission reduction target
- Energy saving awareness creation
- Use of renewable electrical energy
- Clean air silos
- Process and fugitive dust reduction measures

2025 Concrete: Energy & Climate criteria - ratio of criterion achievement



2024 Concrete: Water criteria - ratio of criterion achievement

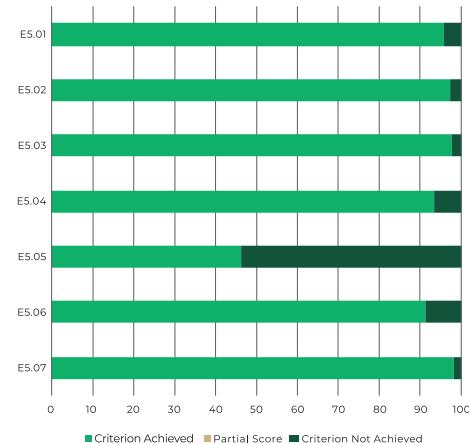
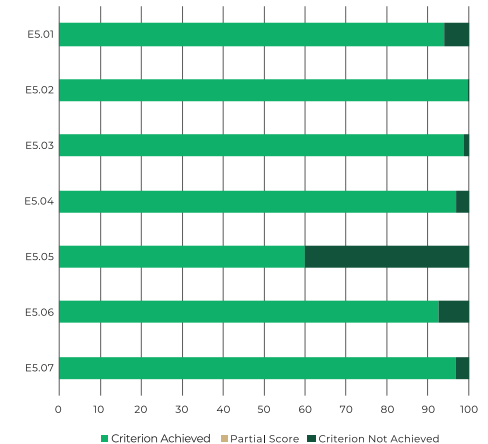


Fig. 6.4: Concrete: Water criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025 Version 3.0

- Water Policy
- Water scarcity and impact
- Water monitoring
- Water target
- Verification of water reporting
- Report on water use and quality of discharged water
- Water Treatment

2025 Concrete: Water criteria - ratio of criterion achievement



The achievements of the secondary materials criterion remain stable in 2025. Some show a slight increase or decrease, but overall the achievements are the same compared to 2025. Improvements can be done in the optimized use of R-material (50%). Concrete producers continue to have a strong focus on secondary materials.

All concrete plants undergoing certification in 2025 have implemented a transport management system. Also, the two criteria requiring the implementation of a transport policy and performing fuel saving awareness training maintained high fulfillment rates of 91% and 95%, respectively. More than 70% of the concrete plants undergoing certification have not yet low emission transportation modes highlighting an opportunity for improvement in order to reflect the growing importance of transitioning towards sustainable transportation methods, i.e. trucks with innovative, CO₂ emission reducing drive technology.

2024 Concrete: Secondary Materials criteria - ratio of criterion achievement

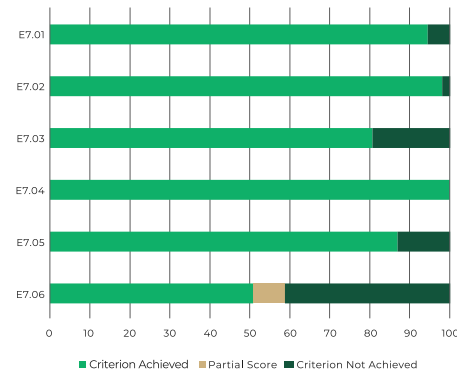


Fig. 6.5: Concrete: Secondary Materials criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025 Version 3.0

Assessment of the availability of secondary materials

Policy on usage of secondary materials

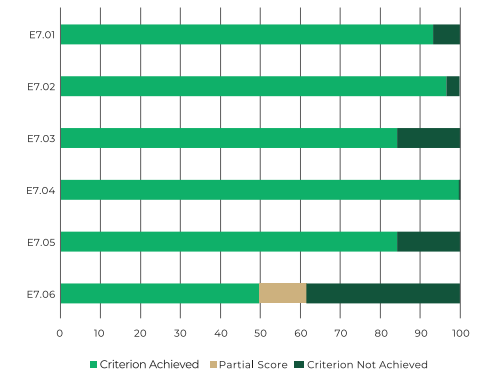
Reporting of the use of secondary materials

Responsible processing of returned concrete

Optimized use of mineral components as ARM, SCM or filler

Optimized use of R-material

2025 Concrete: Secondary Materials criteria - ratio of criterion achievement



2024 Concrete: Transport criteria - ratio of criterion achievement

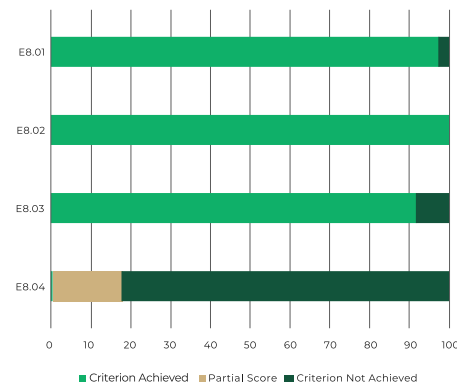


Fig. 6.6: Concrete: Transport criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025 Version 3.0

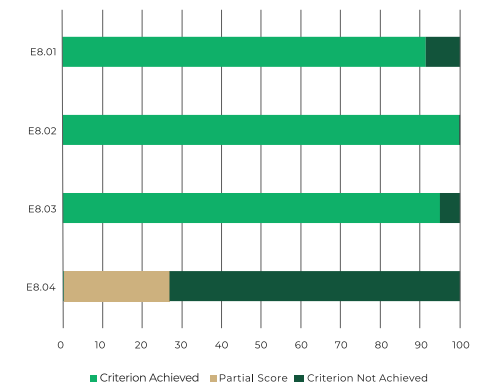
Transport policy

Transport management system

Fuel saving awareness training

Low emission transportation modes

2025 Concrete: Transport criteria - ratio of criterion achievement



6.3.3 Social criteria

From a social perspective, performance remained consistently high, with strong results across health and safety management, community safety, and worker protection. Improvements were observed in communication and information practices. Overall, certified concrete companies maintain a strong social license to operate.

Fig. 6.7 summarizes the achievement of certification criteria relating to social issues realized in 2025 compared to 2024.

The overall achievement ratio of social criteria improved from 2024 to 2025. However the achievements were already high on some criteria in 2024, 2025 showed notable improvements in the achievements of the credits that were lacking. Reducing Lost Time Injuries (LTI) notably improved YoY (39% to 53%), nonetheless it still remains as an opportunity area for improvement, similar to criterion related to undergoing an external control of social standards and ensuring compliance with human rights which clearly remains an opportunity for additional social engagement within the sector. Nevertheless, improvement was again notable from 2024 to 2025, as the fulfillment ratio went up from 15% to 26%.

2024 Concrete: Social criteria - ratio of criterion achievement

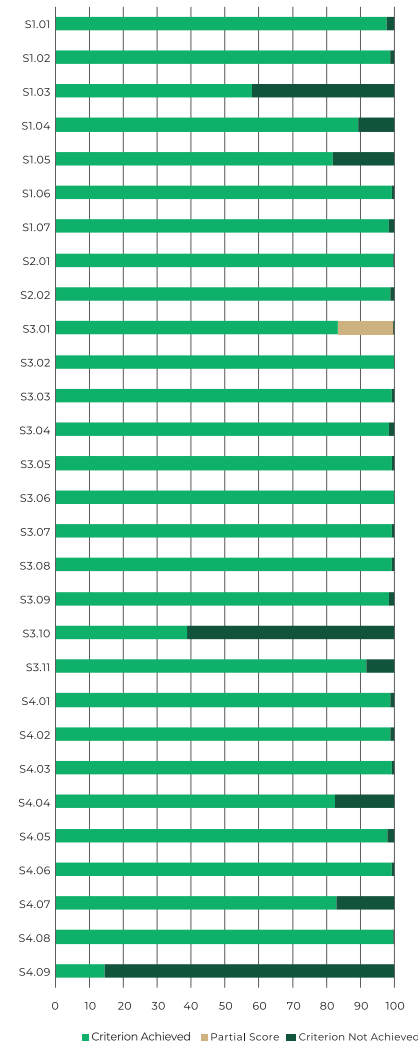


Fig. 6.7 Concrete: Social criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025 Version 3.0

Policy

Social investment

Communication & information

Noise/vibration management plan

Implementation of the noise/vibration management plan

Safety around site for the local community

Transport to and from the site

Public availability of information about product risks and safety

Proactive awareness downstream

Risk analysis

Preventive actions

Occupational health and safety policy

Availability of the OHS policy

Access to medical treatment

Access to clean drinking water

Training on health and safety

Recording of incidents

Corrective actions based upon incidents

No Lost Time Injuries (LTI) during the last three years

No fatality during the last three years

Policy on social protection

Personal record for all employees

Access to personal record for all employees

Personal evaluation

Availability of job profiles

Skills development in the workplace

Preventive medical examination

Work-life balance

(EP) External control of social standards and compliance with human rights

2025 Concrete: Social criteria - ratio of criterion achievement



6.3.4 Supply chain criteria

An achievement rate of 0% indicates that a CSC-certified concrete plant does not source any cement or aggregates from a CSC certified supplier. At the other end of the scale, a 100% achievement means that all cement or aggregates used by the plants are sourced from CSC-certified suppliers, and that these suppliers themselves achieved a total scoring of 100% under CSC certification. It is important to note that achievement depends

not only on the share of certified materials, but also on the performance level of the suppliers. If suppliers score below 100%, the resulting achievement rate for the concrete plant will also be below 100%, even if the complete supply is from certified producers.

Fig. 6.8 presents the achievement levels of the supply chain criteria “C1.01 Cement” and “C2.01 Aggregates” in 2025 compared to 2024. Here it can be seen that only 3% of the concrete plants certi-

fied in 2025 did not use any CSC certified cement. Due to the increasing availability of CSC certified cement plants, about 70% of the concrete plants achieved a scoring between 91% and 100% in 2025. On the other hand, 55% of the CSC-certified concrete plants did not use any CSC-certified aggregates. Although still low compared to cement, this is an improvement compared to 2024 where 59% of the plants did not use any CSC certified cement. Availability of CSC certified aggregates is growing and the number

of CSC certified aggregate producers is steadily increasing. However, the availability is still limited in many regions which reflects in the CSC data.

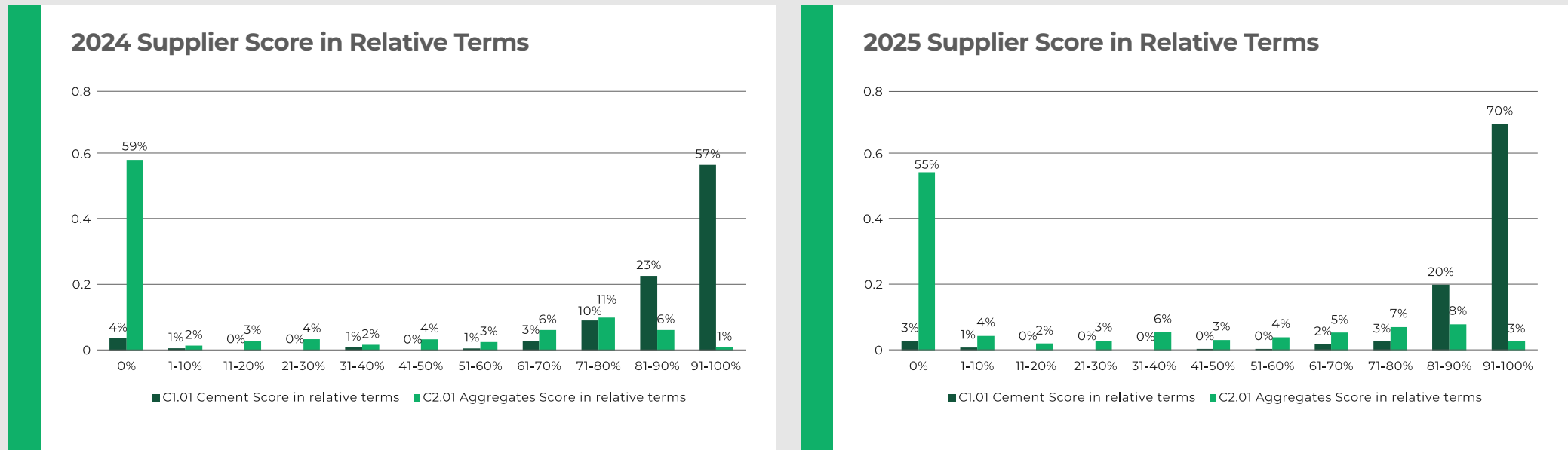


Fig. 6.8 Concrete: Supply chain – ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025, Version 3.0

6.4 Aggregate producers

In 2025, 96 Aggregate production sites were awarded with a Bronze, Silver, Gold or Platinum CSC supplier certificate, with 3 of these awarded to recycled aggregate plants and 4 to marine aggregates plants. Aggregates production sites show low social risk and high operational stability, with limited downside exposure and demonstrate a strong overall environmental performance.

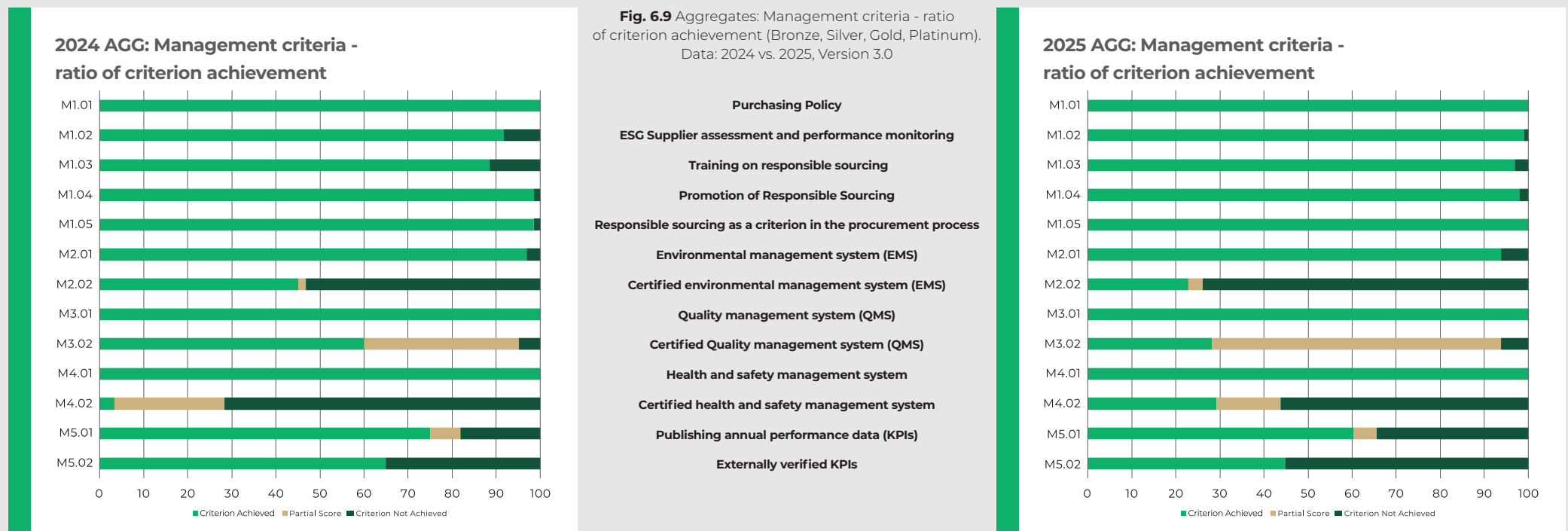
6.4.1 Management criteria

Aggregates production sites display operational consistency and low governance risk, with limited room for further gains outside certified management systems and KPI reporting.

Fig. 6.9 provides insight into the achievement of management related certification criteria in 2025 compared to 2024:

Fig. 6.9 shows strong performance in the criterion related to management systems and purchasing. Responsible sourcing criteria improved to above 97% or full achievement across purchasing policy, supplier assessment, training, promotion and procurement. Documented QMS and H&SMS were fully implemented, while documented EMS reached 94%. The main remaining gaps are certified EMS, QMS and H&SMS. Further impro-

vement opportunities include criteria on benchmarking and reporting which remains still materially weak.



6.4.2 Environmental criteria

Most certified aggregates operations fulfilled CSC requirements, demonstrating that they are managed in an environmentally mature manner, particularly in land and biodiversity management.

Fig. 6.10-6.14 provide an overview on the overall fulfillment of environmental issues in 2025 compared to 2024.

Figs. 6.10 shows that sectoral EPD participation increased from 85% to 89%, while plant-level EPD release remains limited

at 16%. This shows an important role for the Aggregate sector associations in working with sectoral and plant-level EPD's. Land-use criteria are almost fully achieved. On the other hand, the achievement ratio for all environmental criteria relating to the responsible use of land, are fully implemented by all plants.

Climate-related performance is strong but still evolving. Climate policy, GHG monitoring, energy-saving awareness and dust reduction reached 94%, 92%, 99% and 97%, respectively. GHG reporting improved from 72% to 81%, while external-

ly verified GHG reporting, achievement of CO₂ reduction targets and renewable electricity reduced to 47%, 55% and 28%.

The achievement rate of water related criteria presents a generally strong performance, with some variation across indicators. All aggregate plants undergoing certification in 2025 fulfilled criteria related to water policy and water scarcity and impact, representing an improvement compared to 2024. In addition, the overall fulfillment rate of the criteria related to water monitoring, water target, reporting on water use and quality of

discharged water and water treatment, remains generally very high (above 91%). Further progress is needed in the external verification of water reporting where 51% of production sites undergoing certification have not yet fully met this criterion, highlighting a key opportunity for improvement.

Building on already high performance levels in 2024, achievement rates for biodiversity related criteria further improved in 2025, reflecting a clear and positive shift towards more ambitious nature protection across the sector. All aggregate

2024 AGG: Environment criteria - ratio of criterion achievement

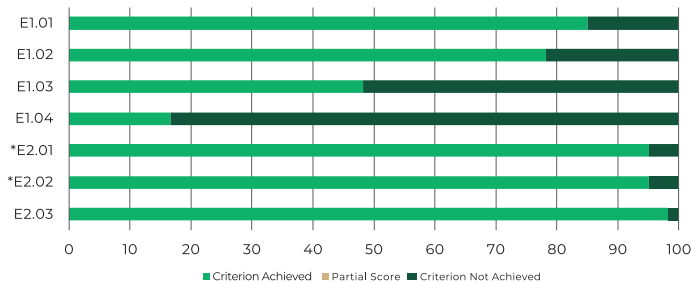
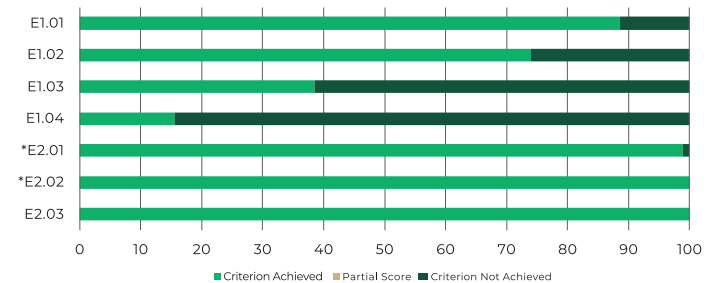


Fig. 6.10 Aggregates: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025, Version 3.0

Sectoral environmental product declaration
Reporting of product specific carbon emissions to customers
Release of environmental product declarations (EPDs) (EP) Release of environmental product declarations (EPDs) on plant level
Policy to avoid globally or nationally important sites
Responsible land use
Protection from pollution

2025 AGG: Environment criteria - ratio of criterion achievement



2024 AGG: Environment criteria - ratio of criterion achievement

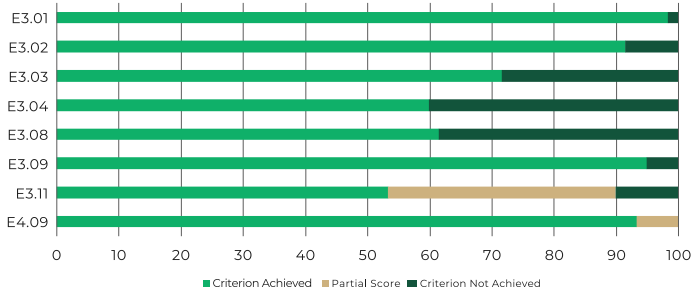
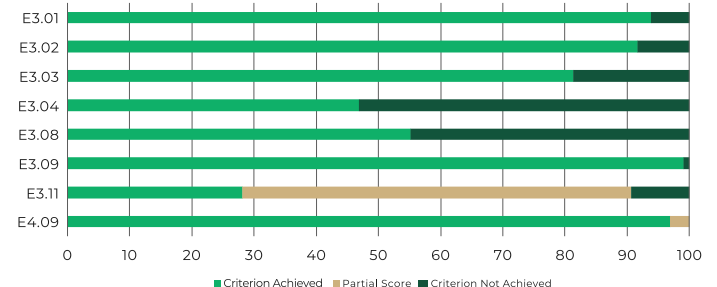


Fig. 6.11 Aggregates: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025, Version 3.0

Climate policy
Monitoring of GHG emissions
Public reporting of monitoring results
Externally verified reporting of GHG emissions
Achievement of CO₂ emission reduction target
Energy saving awareness creation
Use of renewable electrical energy
Process and fugitive dust reduction measures

2025 AGG: Environment criteria - ratio of criterion achievement



*not relevant for recycled aggregate producers, only producers of primary materials are considered in the evaluation

plants undergoing certification in 2025 have a biodiversity policy in place. 99% have implemented high biodiversity value area assessment and a biodiversity management/action plan. Further progress was also observed in more advanced criteria “no net loss” increasing to 47% compared to 33% in 2024, and additional action for nature also improved compared to 2024. A slight decrease can be seen in the biodiversity impact assessment.

Transport management is broadly in place: 98% of sites had a transport policy, 97% a transport management system and 91% fuel-saving training. However, more than 70% have not yet met the low-emission transportation criterion, making logistics a priority improvement area. More than 70% of the aggregate plants undergoing certification have yet to meet the low emission transportation modes criterion, indicating a slower pace of implementation and challenges in the use of low-emission methods.

2024 AGG: Environment criteria - ratio of criterion achievement

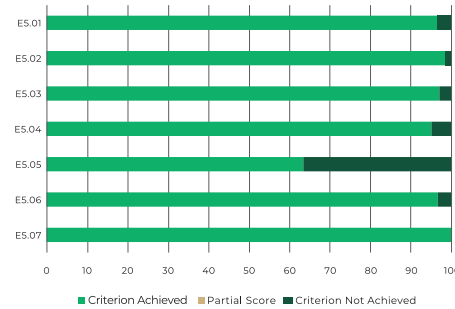
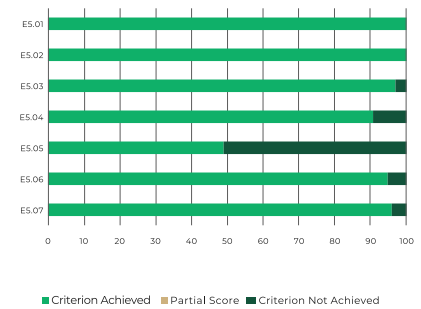


Fig. 6.12: Aggregates: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025 Version 3.0

Water Policy
Water scarcity and impact
Water monitoring
Water target
Verification of water reporting
Report on water use and quality of discharged water
Water treatment

2025 AGG: Environment criteria - ratio of criterion achievement



2024 AGG: Environment criteria - ratio of criterion achievement

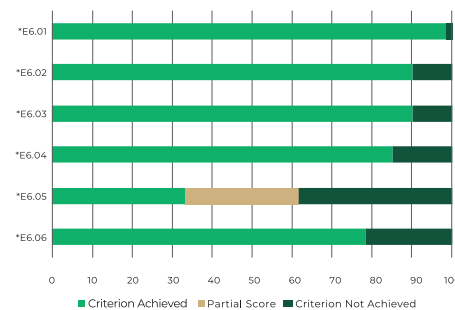
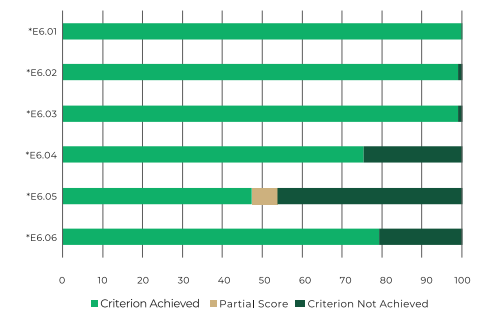


Fig. 6.13: Aggregates: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025 Version 3.0

Biodiversity policy
High biodiversity value area assessment
Biodiversity management/action plan
Biodiversity impact assessment
No net loss
Additional Action for Nature

2025 AGG: Environment criteria - ratio of criterion achievement



2024 AGG: Environment criteria - ratio of criterion achievement

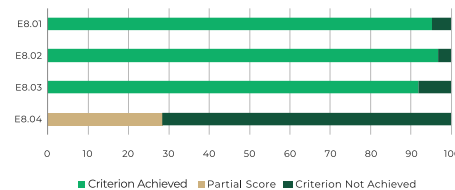
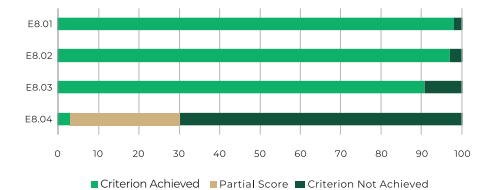


Fig. 6.14: Aggregates: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025 Version 3.0

Transport policy
Transport management system
Fuel saving awareness training
Low emission transportation modes

2025 AGG: Environment criteria - ratio of criterion achievement



6.4.3 Social criteria

Certified aggregate operations show low social risk and high operational stability, with limited downside exposure. Fig. 6.15 shows near-universal social performance: 24 of 27 criteria were achieved above 95%. Risk analysis and communication improved compared with 2024, while occupational health and safety remained strong. Reported absence of LTI (over the past 3 years) increased from 43% to 54%, reflecting a strong and consistent focus on worker safety. External control of social standards improved from 23% to 31% s, though it remains an area for further progress.

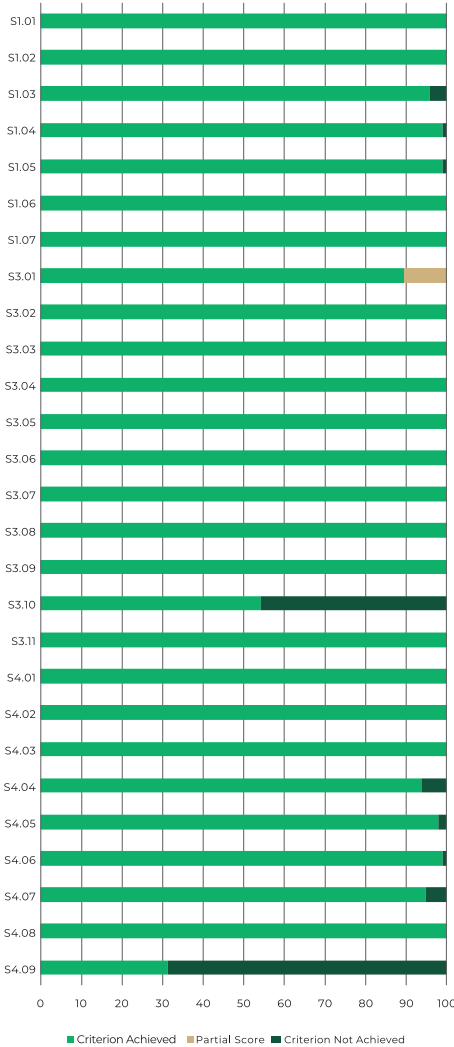
2024 AGG: Social criteria - ratio of criterion achievement



Fig. 6.15 Aggregates: Social criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025, Version 3.0

- Policy
- Social investment
- Communication & information
- Noise/vibration management plan
- Implementation of the noise/vibration management plan
- Safety around site for the local community
- Transport to and from the site
- Risk analysis
- Preventive actions
- Occupational health and safety policy
- Availability of the OHS policy
- Access to medical treatment
- Access to clean drinking water
- Training on health and safety
- Recording of incidents
- Corrective actions based upon incidents
- No Lost Time Injuries (LTI) during the last three years
- No fatality during the last three years
- Policy on social protection
- Personal record for all employees
- Access to personal record for all employees
- Personal evaluation
- Availability of job profiles
- Skills development in the workplace
- Preventive medical examination
- Work-life balance
- (EP) External control of social standards and compliance with human rights

2025 AGG: Social criteria - ratio of criterion achievement



6.5 Cement producers

28 cement plants were awarded with a Bronze, Silver, Gold or Platinum CSC supplier certificate in 2025, thereof 8 cement grinder & blender plants. Cement producers demonstrate broad-based management system strengthening and better integration of responsible sourcing, but like Aggregates, formal certifications and KPI assurance represent a clear opportunity area for improvement.

6.5.1 Management criteria

Fig. 6.16 provides insight into the achievement of management related certification criteria in 2025 compared to 2024.

The achievement ratio of credits awarding the implementation of management systems remained strong and stable in 2025, with some incremental gains across several criteria, with the exception of the criteria addressing certified EMS and certified QMS.

Most responsible sourcing criteria maintained full achievement in 2025 across all plants undergoing certification. Clinker and cement production is performed in plants equipped with mills, kilns and other heavy machinery. This explains why documented management systems are consistently fully implemented in both years across all plants. In 2025, a notable improvement has been on the implementation of the Certified H&SM system, although it still has a large partially fulfilled component.

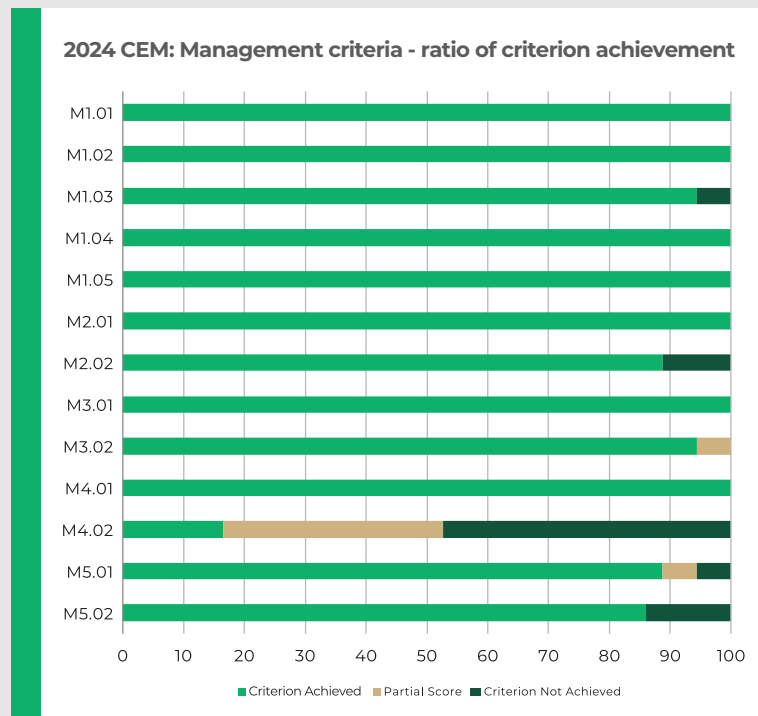
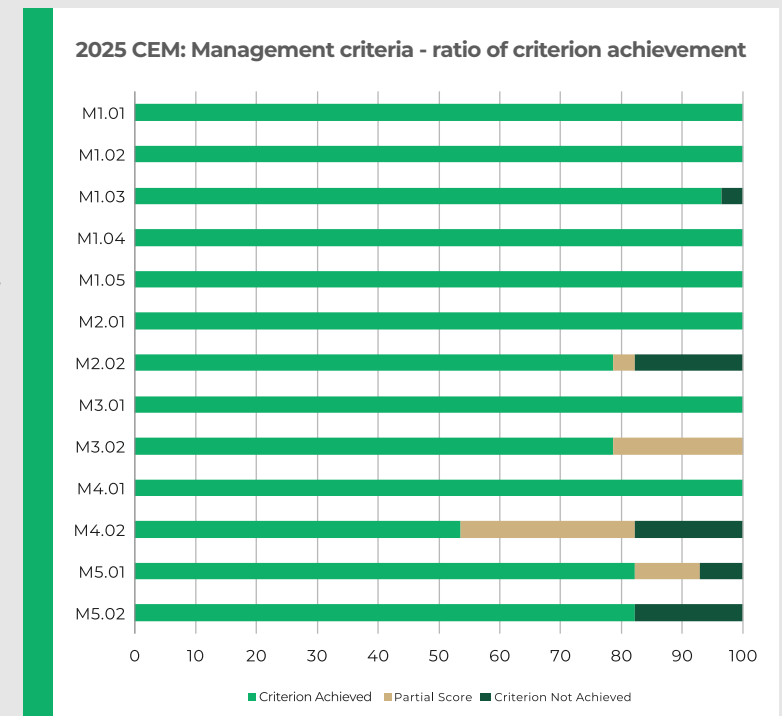


Fig. 6.16 Cement: Management criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025, Version 3.0

Purchasing Policy
ESG Supplier assessment and performance monitoring
Training on responsible sourcing
Promotion of Responsible Sourcing
Responsible sourcing as a criterion in the procurement process
Environmental management system (EMS)
Certified environmental management system (EMS)
Quality management system (QMS)
Certified Quality management system (QMS)
Health and safety management system
Certified health and safety management system
Publishing annual performance data (KPIs)
Externally verified KPIs



6.5.2 Environmental criteria

The achievement ratio of credits awarding the implementation of environmental performance presented a mixed score. While some criteria continued to strengthen year-on-year, the release of EPD's on plant level and CO₂ targets decreased. Further progress remains possible in some other areas. The cement sector is increasingly transitioning from policy adoption to performance measurement. At the same time, continued progress in emissions abatement, fuel switching, and renewable energy deployment will be key to accelerating decarbonization.

Figs. 6.17 - 6.24 provide an overview on the achievement ratio of certification criteria relating to environmental issues in 2025 compared to 2024:

Given its scale and central role in the built environment, cement holds one of the greatest levers to drive meaningful global CO₂ emissions reductions. In this context, Environmental Product Declarations (EPDs) are becoming increasingly common practice, enhancing transparency and enabling consistent, comparable assessment of product-specific emissions. Significant progress was observed in transparency-related criteria in 2025. The

share of plants contributing to sectoral EPDs, increased from 94% in 2024 to 100% in 2025. Similarly, reporting of product specific carbon emissions to customers and release of environmental product declarations (EPDs) increased from 94% to 96% and 86% to 93% respectively.

The exemplary performance criterion addressing the release of environmental product declarations on plant level saw a compliance rate with 79%. Although it is a bit lower than in 2024, this still shows a firm uptake across the sector. In parallel in 2025, the cement sector continued to strengthen responsible land ma-

agement practices. Achievement rates of land use related criteria were near full-achievement.

Climate governance is strong: all certified cement plants had a climate policy, monitored and publicly reported GHG emissions, used external GHG verification, reported to the GNR database and implemented energy-saving awareness. Remaining priorities include CDP reporting, science-based CO₂ targets, target achievement and direct emissions reduction. 100% renewable electricity usage improved from 11% to 25% but remains a clear opportunity.

Fig. 6.17 Cement: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025, Version 3.0

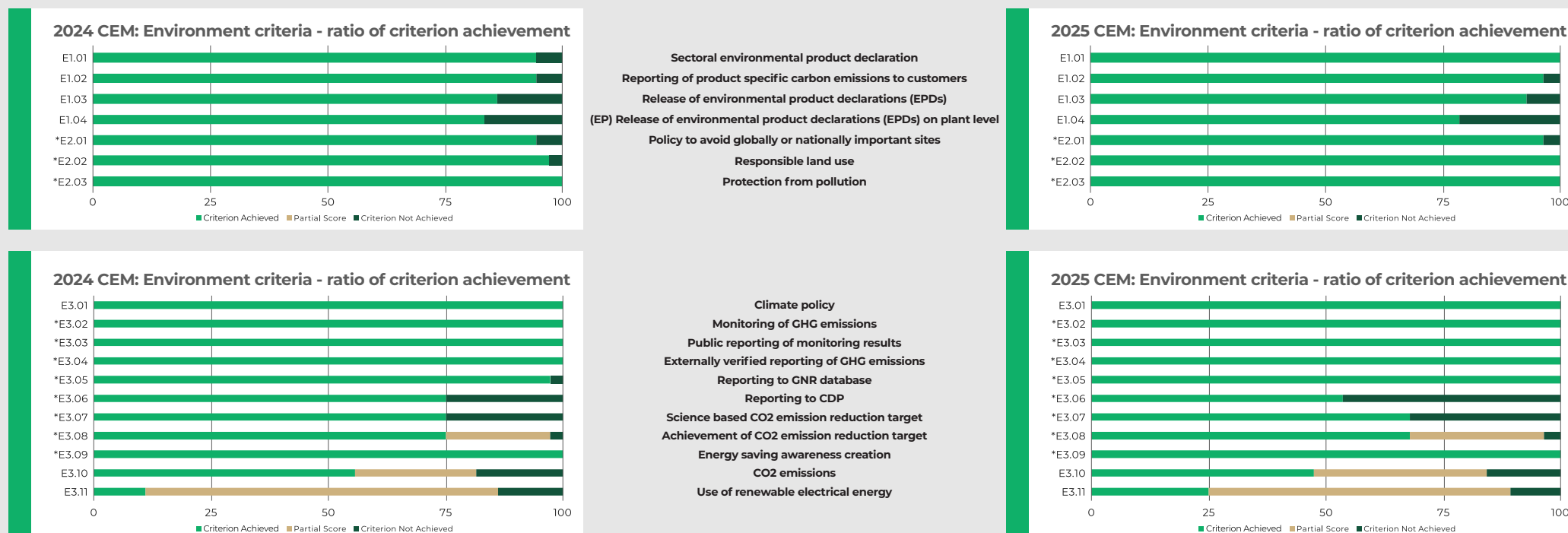


Fig. 6.18 Cement: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025 Version 3.0

*Not relevant for cement grinders, only clinker producers are considered in the evaluation

The fulfillment of the air-emission management credit also remains stable. Verification of emission reporting and dust reduction measures were fully implemented, dust-emission criteria improved from 85% to 89%, and NOx, SOx and mercury criteria were at least partially achieved by all plants. Emission reduction targets and air-emission monitoring reached 89% and 95%.

In 2025, full compliance was achieved by all cement plants with criteria focused on water monitoring and water treatment. The achievement ratio of cement plants undergoing CSC certification in 2025 was at 95% for criteria related to water policy, water scarcity and impact assessment, water target and report on the quality of used and discharged water. Meanwhile, verification of water reporting still represents an area for improvement.

Biodiversity remains a key priority in cement production, particularly in relation to quarrying activities. In 2025, cement plants undergoing certification continued to strengthen environmental risk management. 95% have a biodiversity policy in place, and an equal share implementing biodiversity management/action plan. High biodiversity value area assessments were fully achieved by all plants undergoing certification. In addition, 74% of the cement plants fulfilled criteria related to biodiversity impact assessment and the implementation of additional actions for nature, demonstrating a slight decrease in comparison to the 2024 achievements. The criterion “no net loss” improved from 2024 to 2025 reaching 42% fulfillment ratio (2024: 33%). This reflects a strengthening

2024 CEM: Environment criteria - ratio of criterion achievement

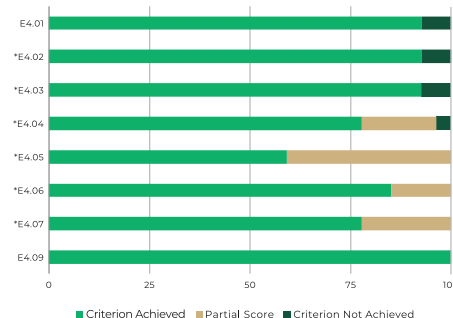
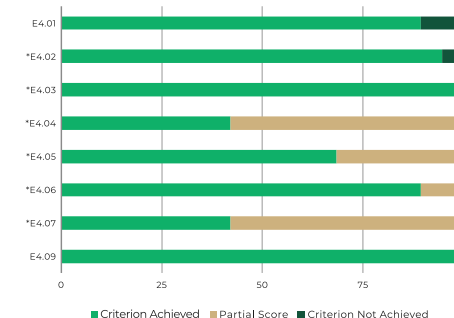


Fig. 6.19 Cement: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025, Version 3.0

Emission reduction targets
Monitoring and reporting of emissions
Verification of emission reporting
NOx emissions
SOx emissions
Dust emissions
Mercury emissions
Process and fugitive dust reduction measures

2025 CEM: Environment criteria - ratio of criterion achievement



2024 CEM: Environment criteria - ratio of criterion achievement

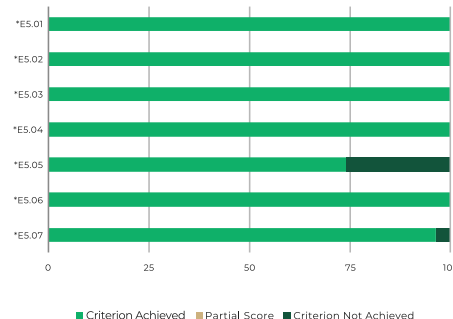
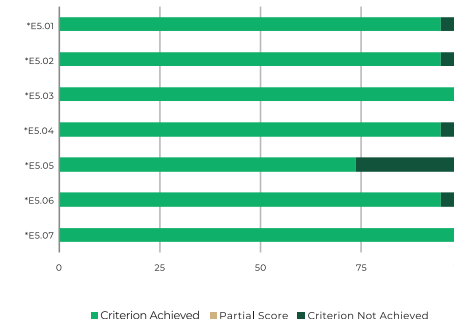


Fig. 6.20 Cement: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025, Version 3.0

Water Policy
Water scarcity and impact
Water monitoring
Water target
Verification of water reporting
Report on water use and quality of discharged water
Water treatment

2025 CEM: Environment criteria - ratio of criterion achievement



2024 CEM: Environment criteria - ratio of criterion achievement

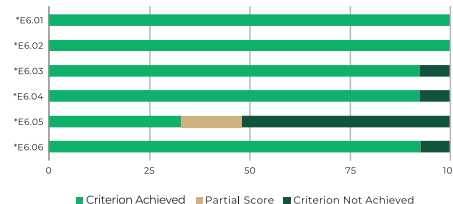
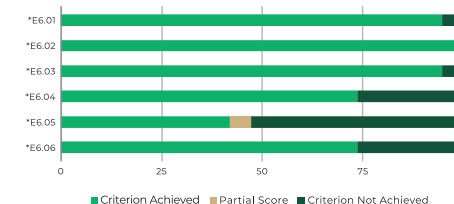


Fig. 6.21 Cement: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025, Version 3.0

Biodiversity policy
High biodiversity value area assessment
"Biodiversity management/action plan
Biodiversity impact assessment
No net loss
Additional Action for Nature

2025 CEM: Environment criteria - ratio of criterion achievement



ambition within the sector to not only manage impacts, but also enhance biodiversity value and support ecosystem restoration in quarrying operation.

All criteria related to secondary materials remain near-full achievement and fully achieved demonstrating the commitment of cement producers to circularity.

Regarding the credit on transportation, a slight decline was observed compared to 2024 in the adoption of transport policy, fuel saving awareness training and low emissions transportation mode. These areas continue to offer opportunities for further progress, particularly as advancements technology, fuel substitution, and investment in low-emission transport solutions accelerate across the sector.

Significant progress was made in meeting the requirements of the secondary fuels' credit. All plants met the criteria for use of restricted waste and assessment of alternatives, showing improvement from 2024. The remaining criteria were met at a 95% rate, indicating that most plants undergoing CSC certification (Bronze, Silver, Gold, Platinum) in 2025 are dedicated to reducing fossil fuel consumption by incorporating secondary fuels when possible. These plants also ensure that alternative fuels use does not present health, safety or environmental risks during sourcing, transportation, handling, production, or the final product's end of life. This approach aids in waste reduction and supports resource recovery, aligning with broader sustainability objectives.

2024 CEM: Environment criteria - ratio of criterion achievement

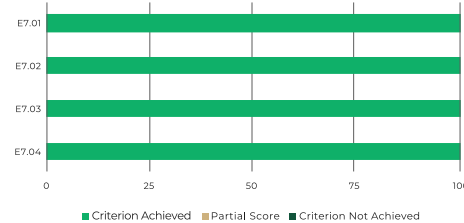


Fig. 6.22 Cement: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025 Version 3.0

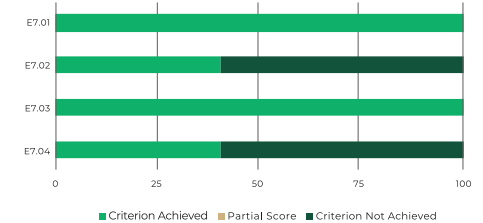
Assessment of the availability of secondary materials

Policy on usage of secondary materials

Reporting of the use of secondary materials

Optimized use of mineral components as ARM, SCM or filler

2025 CEM: Environment criteria - ratio of criterion achievement



2024 CEM: Environment criteria - ratio of criterion achievement

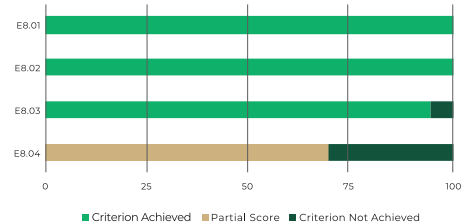


Fig. 6.23 Cement: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025 Version 3.0

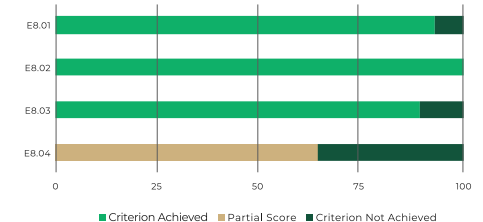
Transport policy

Transport management system

Fuel saving awareness training

Low emission transportation modes

2025 CEM: Environment criteria - ratio of criterion achievement



2024 CEM: Environment criteria - ratio of criterion achievement

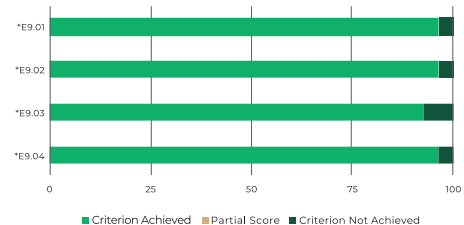


Fig. 6.24 Cement: Environmental criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025, Version 3.0

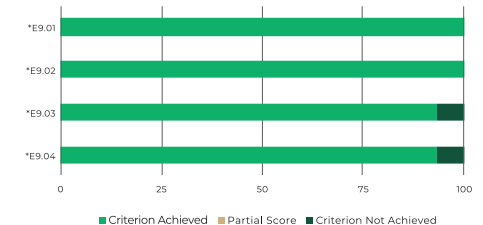
Use of restricted waste

Assessment of alternatives

Assessment of non-harmful alternatives fuels

Communication and stakeholder involvement

2025 CEM: Environment criteria - ratio of criterion achievement



6.5.3 Social criteria

Fig. 6.25 summarizes the achievement rates of certification criteria relating to social issues as in 2025 compared to 2024:

The achievement ratio of credits awarding the implementation of social performance in the cement sector remained robust, with consistently high achievement across different criteria. The overall scoring in social criteria, already high in 2024, was improved again in 2025. 20 out of 28 criteria were fulfilled by all plants undergoing CSC certification (Bronze, Silver, Gold, Platinum) in 2025. Good relationships with the surrounding community, occupational health and safety practices and responsible labor practices are generally well established and the corresponding certification criteria therefore mostly fulfilled.

Notable progress was observed in more advanced social performance areas. Risk Analysis, increased from 83% to 96%, efforts in reducing lost time injuries (LTI) improved from 31% to 43%, and external control of social standards and compliance with human rights notably improved in 2025 compared to 2024, from 17% to 36% respectively, reflecting a strengthening focus on continuous improvement and accountability.

2024 CEM: Social criteria - ratio of criterion achievement

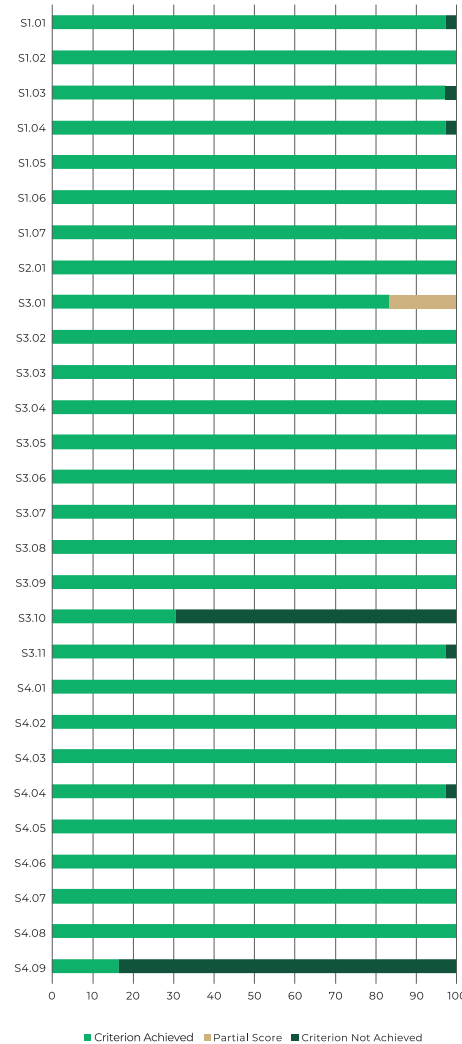
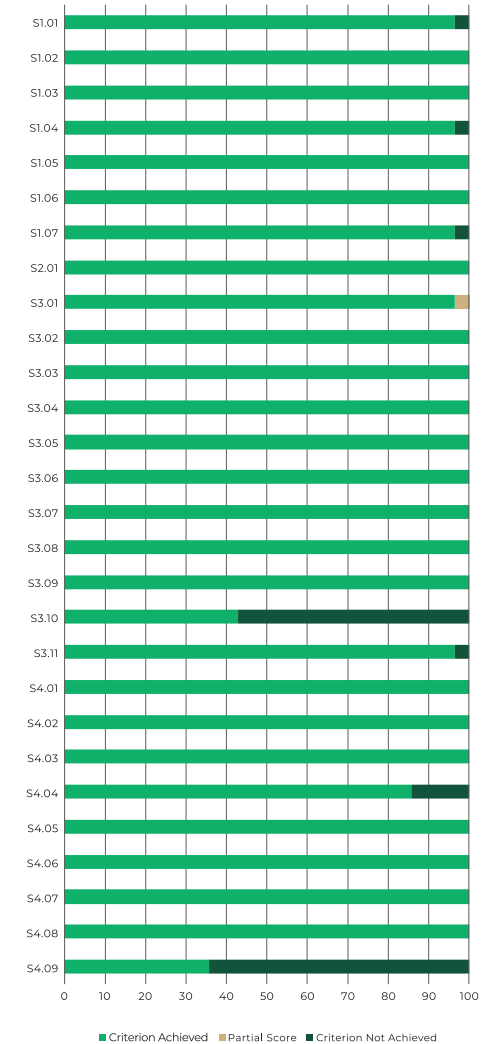


Fig. 6.25 Cement: Social criteria - ratio of criterion achievement (Bronze, Silver, Gold, Platinum). Data: 2024 vs. 2025, Version 3.0

Policy
Social investment
Communication & information
Noise/vibration management plan
Implementation of the noise/vibration management plan
Safety around site for the local community
Public availability of information about product risks and safety
Transport to and from the site
Risk analysis
Preventive actions
Occupational health and safety policy
Availability of the OHS policy
Access to medical treatment
Access to clean drinking water
Training on health and safety
Recording of incidents
Corrective actions based upon incidents
No Lost Time Injuries (LTI) during the last three years
No fatality during the last three years
Policy on social protection
Personal record for all employees
Access to personal record for all employees
Personal evaluation
Availability of job profiles
Skills development in the workplace
Preventive medical examination
Work-life balance
(EP) External control of social standards and compliance with human rights

2025 CEM: Social criteria - ratio of criterion achievement





7 | Innovation

© Solar eclipse behind the giant sea link, Ankur Tambde

The Concrete Sustainability Council (CSC) Certification System for Concrete promotes innovation via the dedicated innovation credit “B3 Innovation”, which awards points to innovative practices/products or solutions in the responsible sourcing of concrete.

A project could be considered an innovation, if:

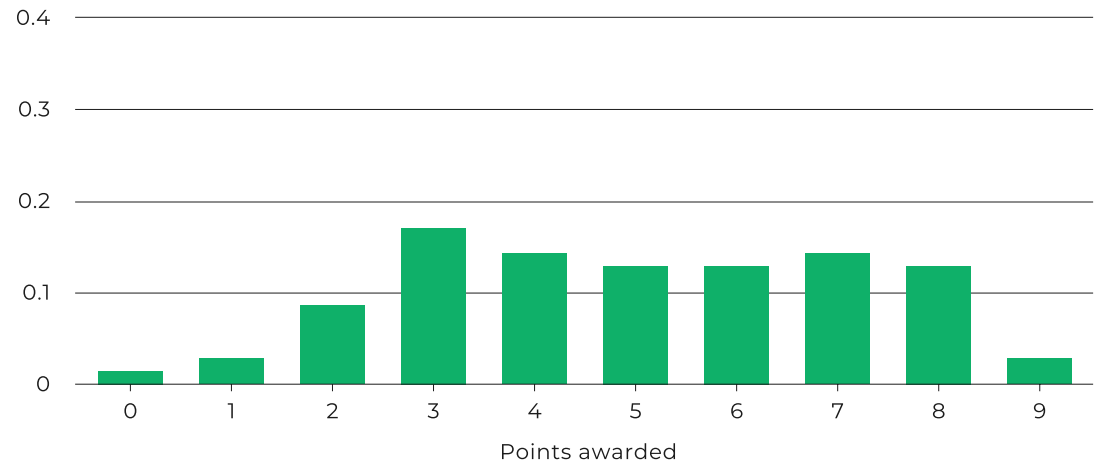
- It stimulates significant improvement of the concrete sector and its supply chain regarding environmental, social and/or economic sourcing practices;
- It is demonstrating leadership by best practice, hence it is showcasing the progressive potential and competitiveness of the concrete sector and its supply chain;
- Generic studies or assessments cannot be considered innovations.

B3 Innovation credit aims at stimulating:

- The development and implementation of new solutions that contribute to the sustainability of the operations, its products, its suppliers or other parts of the value chain;
- Best practices in the field of sustainability that are not covered by this certification system;
- Exemplary performance under any CSC certification criterion.

In 2025, the CSC’s innovation committee (IC) rewarded 59 innovation applications submitted by projects undergoing CSC certification according to CSC System Version 3.0, compared to 70 applications submitted in 2024. Innovation points were granted to all applications submitted with results ranging between 1 and 9 points out of a maximum of 9 achievable points. In 2024, points achieved by innovation projects were distributed more evenly between 3 to 8 points. In 2025, most projects with points awarded were concentrated around 6 points.

Distribution of points awarded in 2024



Distribution of points awarded in 2025

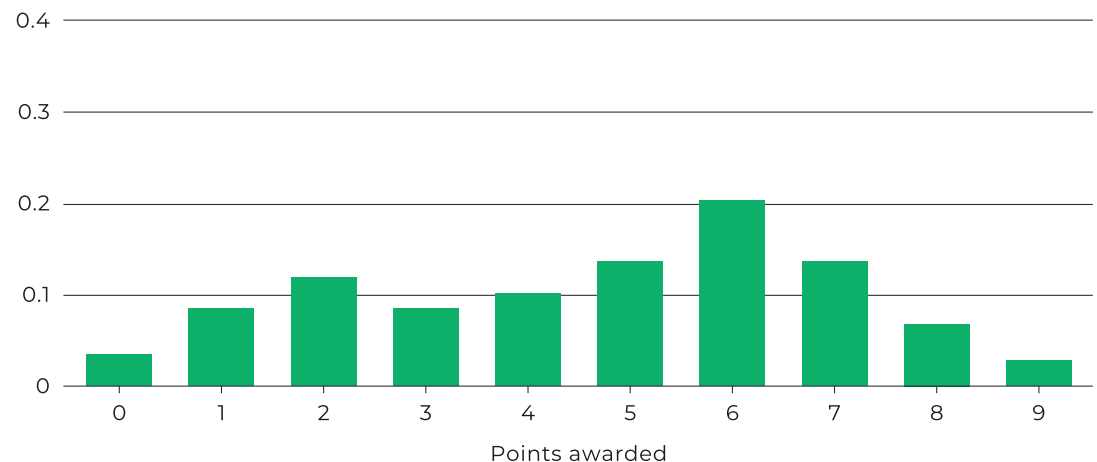


Fig. 7.1 Innovation points awarded to CSC Version 3.0 projects



8 | Continuous improvement

© Beneath the opera house, Lemjay Lucas

Continuous improvement of the CSC certification system, including its toolbox and supporting guidance, remains a key lever to enhance the sustainability performance of CSC-certified plants and ensure the system's continued relevance in a rapidly evolving regulatory and market landscape.

Feedback from Regional System Operators (RSOs), Certification Bodies (CBs), certified companies, and a broad range of stakeholders continues to play a central role in refining the system. In 2025, this collaborative approach translated into targeted enhancements aimed at improving usability, strengthening consistency, and addressing emerging challenges across the concrete value chain.

Building on the implementation of CSC Technical Manual Version 3.0 in 2024, efforts in 2025 focused on consolidation, clarification, and practical application. Additional guidance and interpretation notes were developed to support consistent implementation of key criteria, particularly in areas such as responsible sourcing, CO₂ performance, and traceability of materials. These efforts contribute to increasing comparability of results across regions and reinforce the robustness of the certification system.

The CSC Toolbox continued to evolve, with further improvements to usability and data quality. Enhancements included refinements to reporting functionalities, strengthened validation processes, and improved alignment between auditor inputs and required evidence. These updates support greater transparency, reduce administrative burden, and facilitate more efficient certification and auditing processes.

In parallel, CSC continued to strengthen its data-driven approach to sustainability performance. The ongoing development and use of monitoring tools at national level, such as those implemented by RSOs, enable more reliable tracking of key indicators, including CO₂ emissions and circularity. This contributes to positioning CSC as a credible framework aligned with evolving expectations on measurable performance, data transparency, and European sustainability reporting requirements.

Through these continuous improvement efforts, CSC remains committed to maintaining a robust, credible, forward-looking certification system, and responsive to industry needs. By continuously enhancing its framework and tools, CSC supports certified companies in progressing towards higher levels of sustainability performance and contributes to the broader transition of the concrete sector towards a more sustainable and resilient built environment.

© Natural gas powerplant, Orhan Bektas





9 | Our way forward

© Ancient engineering wonder, Piotr Gorajek

CSC's ambition remains clear: to position its certification as the global reference standard for sustainable and responsible concrete production, contributing meaningfully to reducing the environmental impact of the construction sector and supporting the transition towards a more sustainable built environment. When responsibly sourced and produced, concrete can be part of the solution to some of the world's most pressing environmental, social, and economic challenges.

Building on its Theory of Change, CSC is shaping how this transformation happens in practice, by bringing together stakeholders, defining credible standards, ensuring robust and independent assurance, and creating the conditions for sustainable concrete to become the preferred choice in the market.

Looking ahead, CSC will continue to prioritise targeted communication, stakeholder engagement, and strategic partnerships to further drive adoption and recognition of the certification system across markets. Strengthening collaboration with public authorities, industry initiatives, and financial stakeholders will be key to ensuring alignment with evolving policy frameworks and market expectations, particularly in the context of European sustainability regulations and green public procurement.

A key focus will be on enhancing the credibility, transparency, and practical usability of the system. CSC will continue to deepen its consultation processes to remain inclusive and responsive to stakeholder needs, while reinforcing the role of its Advisory Committee in guiding the system's development. At the same time, CSC will pursue continuous

improvements in governance and best practices, in line with internationally recognised frameworks.

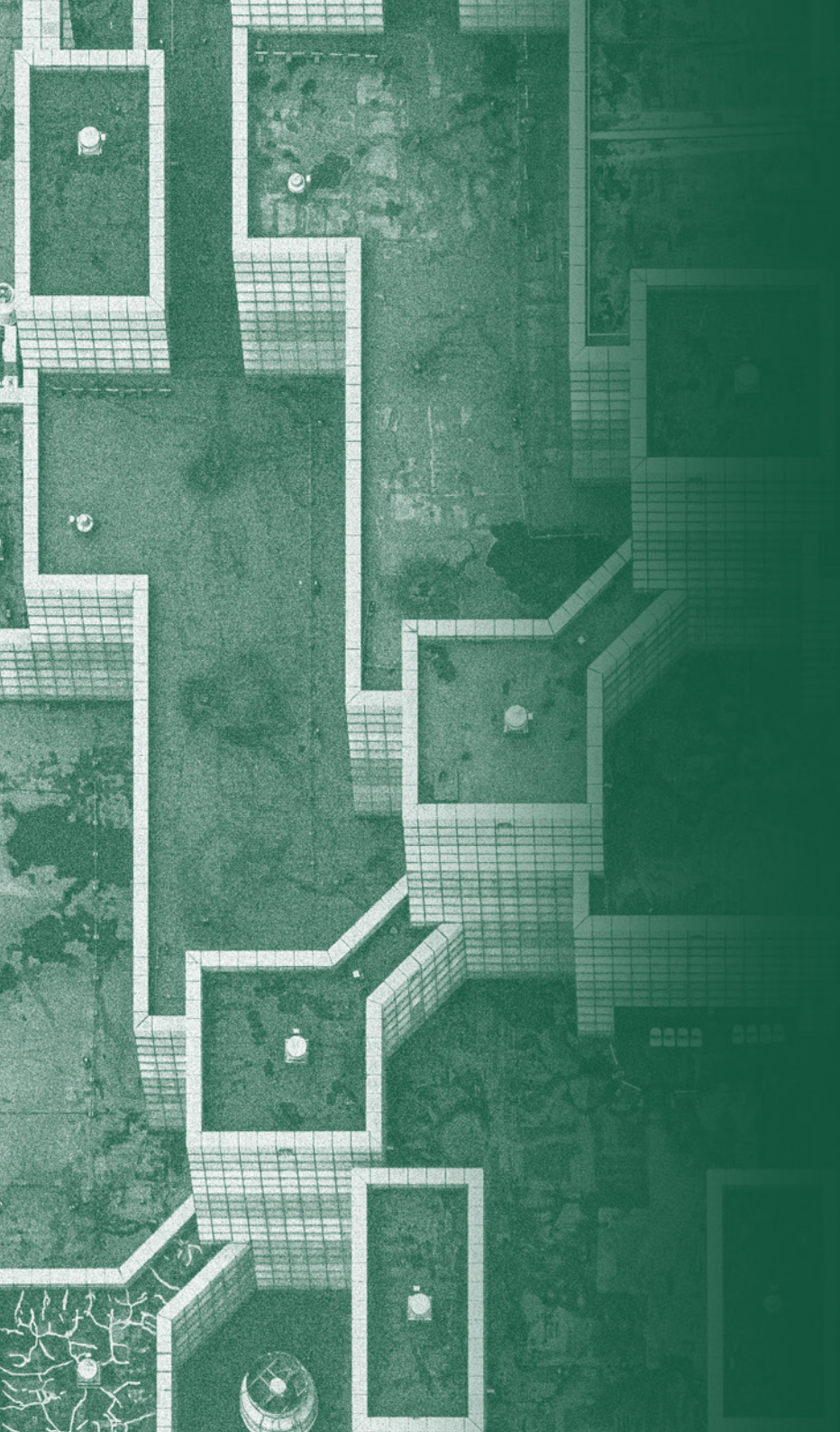
Momentum is building across regions. As producers come forward and demand begins to evolve, we have developed a comprehensive guide to obtaining CSC certification. Our role is to nurture and accelerate this movement. Ensuring that responsible sourcing is not only encouraged, but embedded in procurement frameworks, building standards, and investment decisions.

Looking forward, our focus is not only on expanding globally, but also on deepening impact where we are already present. Supporting Regional System Operators and Certification Bodies will be key to scaling implementation while ensuring consistency and quality across markets.

Ultimately, CSC's ambition goes beyond certification. It is about contributing to a broader shift; where responsible sourcing becomes standard practice, where low-carbon and circular approaches are expected, and where concrete plays its full role in building a more sustainable, resilient future.



© The concrete Spine of the Lli Valley – Victor Zhuo



10 | Web-page

© Urban Trio, Celbert Palaganas

To enhance accessibility and ensure a consistent user experience, CSC has integrated and aligned the websites of its Regional System Operators in the United States, Latin America, Belgium, the Netherlands, Germany, Türkiye, MENA, Austria, and Italy with the CSC global platform (www.csc.eco). While these regional websites are available in local languages, they share a unified structure, design, and functionality with the global website, ensuring both local relevance and global consistency. All key information is accessible online, with the most comprehensive and up-to-date content available on the CSC global website (www.csc.eco). In addition, the CSC global website has been further developed to strengthen transparency, accessibility, and understanding of the certification system. It includes an enhanced CSC Logo and Claims User Guide, providing clear guidance on how certification claims can be communicated in a credible, accurate, and verifiable manner, supported by robust traceability requirements and third-party verification.

A dedicated Theory of Change section has been introduced to clearly articulate how CSC certification contributes to advancing environmental, social, and governance performance across the concrete value chain, and how it supports broader sustainability objectives.

The website also provides a comprehensive overview of CSC Assurance, including its data-driven monitoring approach through the CSC Toolbox, third-party certification by accredited Certification Bodies, and continuous performance review processes. This ensures the credibility, consistency, and continuous improvement of certified operations.

CSC Standards are publicly available on the website, offering a transparent and performance-based framework covering key environmental, social, and governance criteria. The standards define clear performance levels and improvement pathways, enabling companies to progressively enhance their sustainability performance in line with global expectations.

The About Us section has been expanded to provide greater transparency on CSC's legal basis in Switzerland, where it operates as an independent, non-commercial, multi-stakeholder association. It also explains CSC's funding model, primarily based on registration rights, membership fees, and certification-related contributions, and how all income is reinvested into system development, governance, and global implementation.

Transparency is further ensured through open access to certification processes and decisions. Certification requirements, technical manuals, and a public registry of certified companies are available online, allowing stakeholders to verify certification outcomes and better understand system requirements. A grievance and feedback mechanism is also accessible to ensure accountability.

The website highlights CSC's active engagement with global sustainability initiatives, including the Global Cement and Concrete Association, the Global Alliance for Buildings and Construction, and the One Planet Network, as well as its alignment with the United Nations Sustainable Development Goals. These collaborations reinforce CSC's contribution to advancing sustainability in the built environment.

Finally, CSC ensures public availability of governance and decision-making information. The structure of its Board and Advisory Committees, Annual Reports, and key system updates are accessible online, providing full transparency on how decisions are made and how the system evolves. This is complemented by a strong multi-stakeholder engagement approach, including public consultations, technical committees, and ongoing dialogue with industry, civil society, and experts, ensuring that the system remains inclusive, credible, and continuously improving.



© Rice field irrigation in Aceh, Indonesia, Riza Azhari



11 | Governance structure

© Running through concrete dreams, Serkan Dogus

The CSC's Governance Structure is shown in Fig. 11.1:

The transparent and effective decision-making process within the CSC is the responsibility of the **CSC's Executive Committee**. Continuous engagement with a wide range of stakeholders is guaranteed through the dedicated **Adviso-**

ry Committee, which the CSC was able to establish in 2020. The committee was renewed in 2025 with distinguished experts as well as leading green building councils' involvement. Additionally, the **Technical- and the Communication Committee** with defined leadership ensure target orientated work. The Innovation Committee assesses CSC innovation

application and thereby encourages innovative responsible sourcing practices. **The General Assembly**, composed of all CSC members, convenes once per year to provide overall strategic direction and ensure inclusive participation. The Chair, the Vice-Chair, and the Managing Director form the core of **the Management Team**. The Management Team meets on

a monthly basis to coordinate on key legal, financial, and organizational matters essential to the day-to-day functioning of the CSC.

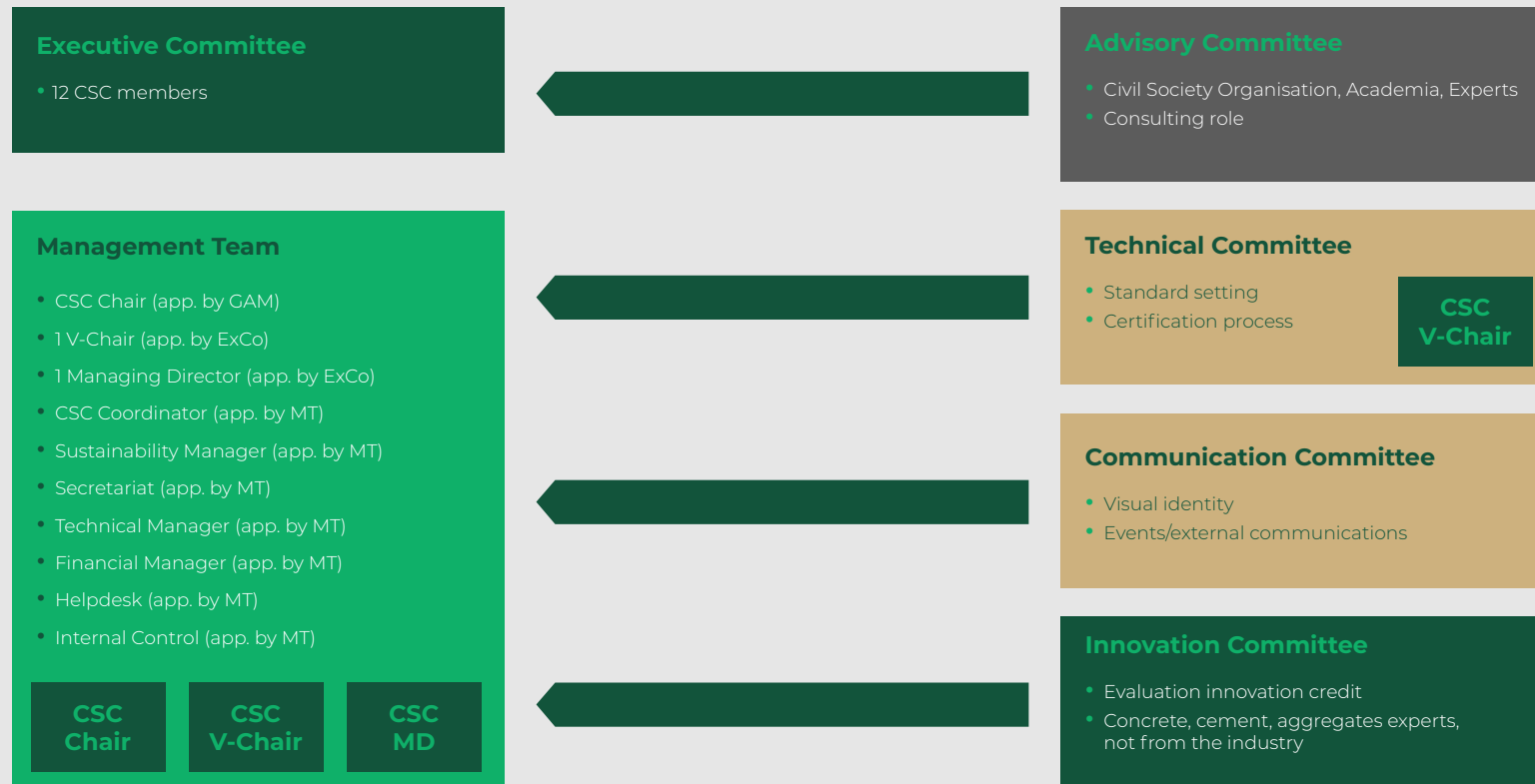


Fig. 11.1 CSC Governance Structure

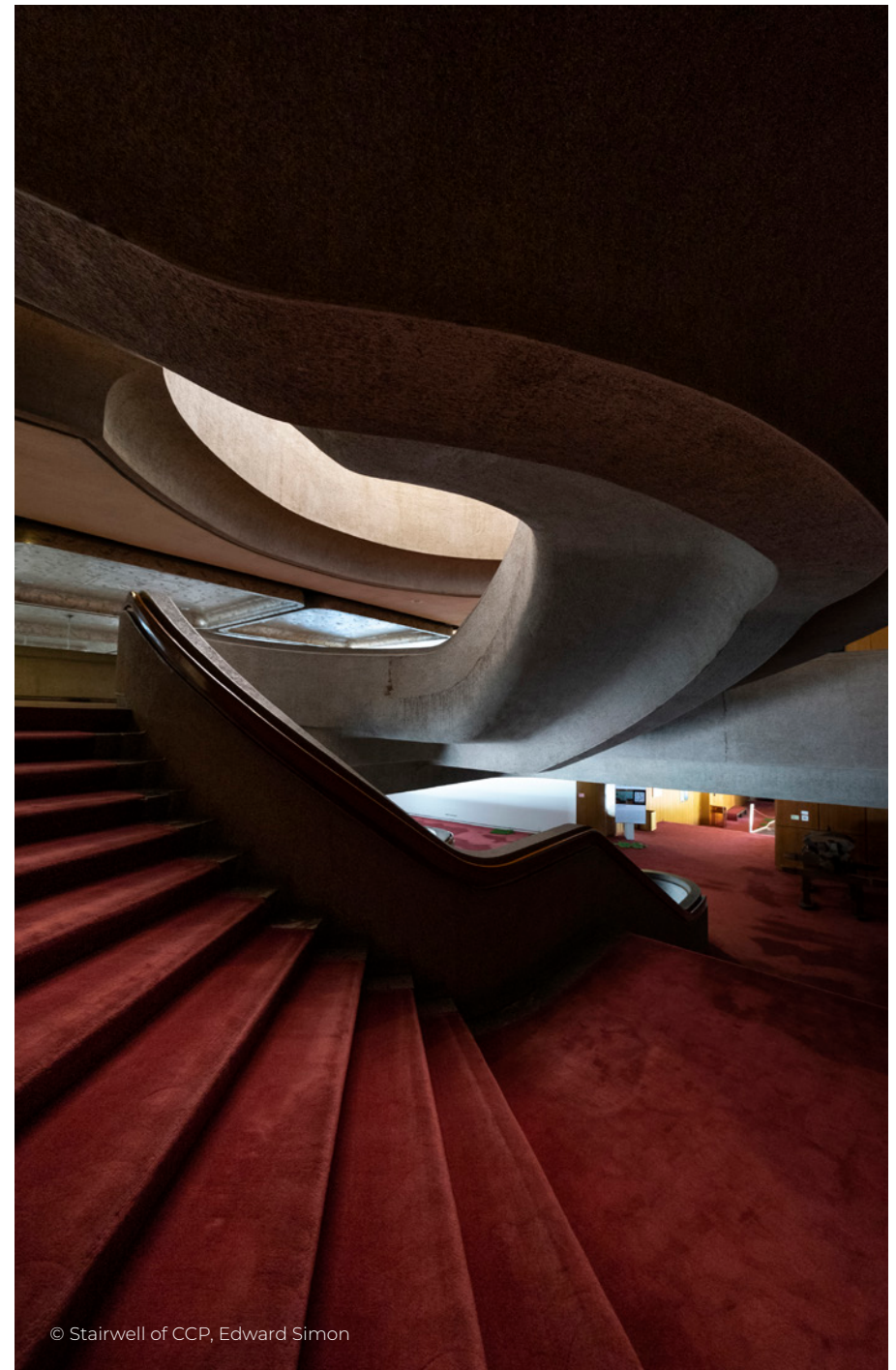


12 | Abbreviations

© Pillars Across the Sea, Celbert Palaganas

12 Abbreviations

B.E.S.T	Ecological and Sustainable Design in Buildings (residential certification system developed by the Turkish Green Building Council)	GBC	Green Building Council
BREEAM	Building Research Establishment Environmental Assessment Methodology (sustainability certification for buildings)	GBFS	Ground blast furnace slag (by-product used in sustainable concrete production)
CASA	Voluntary certification system developed by the Guatemala Green Building Council (sustainability standard for housing)	GCCA	Global Cement and Concrete Association
CB	Certification Body	HSMS	Health and Safety Management System
CSC	Concrete Sustainability Council	ISEAL	International Social and Environmental Accreditation and Labelling Alliance.
CSO	Civil Society Organisation	LEED	Leadership in Energy and Environmental Design (green building certification system developed by the U.S Green Building Council)
DGNB	Deutsche Gesellschaft für Nachhaltiges Bauen – German Green Building Council	MENA	Middle East and North Africa
EMS	Environmental Management System	MT	Management Team
EPD	Environmental Product Declaration (life cycle-based environmental performance report for products)	ÖGNI	Österreichische Gesellschaft für Nachhaltige Immobilienwirtschaft (Austrian Green Building Council)
ENVISION	Sustainability framework and rating system for infrastructure projects	QMS	Quality Management System
GAM	General Annual Meeting	RSO	Regional System Operator
		SDG	Sustainable Development Goal (global goals adopted by the United Nations in 2015 for sustainable development)



© Stairwell of CCP, Edward Simon



The Concrete Sustainability Council

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