



The Heavy Construction Materials Agenda: What Queensland Must Do to Keep Infrastructure Delivery Moving

Queensland Transport Infrastructure Conference 2026
Michael Kilgariff | CCAA CEO

About CCAA

Cement Concrete & Aggregates Australia is the voice of the heavy construction materials industry in Australia.

CCAA members supply around 90% of the cement, concrete and aggregates used to build Australia's infrastructure.

The industry contributes \$20.7 billion to Australia's GDP and supports 112,970 jobs across the economy, including more than 21,000 directly within the sector and a further 90,000 across the broader supply chain and economy.



Foundation Members



Members





Associate Members





Queensland Context: A Once-in-a-Generation Delivery Task

- A \$116.8bn infrastructure pipeline is driving record construction demand across Queensland.
- Brisbane 2032 is creating fixed delivery deadlines for major projects across SEQ.
- SEQ demand for hardrock, sand and gravel is forecast to reach 36Mt by 2027/28.
- Queensland's population is projected to exceed 6 million people by 2032.
- Reliable materials supply will be critical to keeping projects on time and on budget.



The argument in one slide

The delivery pipeline is now a materials supply question.

1

Infrastructure delivery is now a materials issue

- Transport, housing, hospitals, utilities and Olympic-related projects all rely on heavy construction materials.
- A delayed tonne becomes a delayed pour, pavement, bridge, rail corridor or subdivision.

2

SEQ faces a capacity constraint, not a geology problem alone

- Hardrock resources exist, but annual production is constrained by caps, approvals, operating hours and truck movements.
- Short-term relief requires responsible uplift from quarries closest to demand.

3

The cheapest tonne is the tonne closest to demand

- Transport, housing, hospitals, utilities and longer haulage pushes up costs, truck kilometres, road wear, emissions and community exposure.
- Proximity is a public-interest outcome, not just an industry preference.

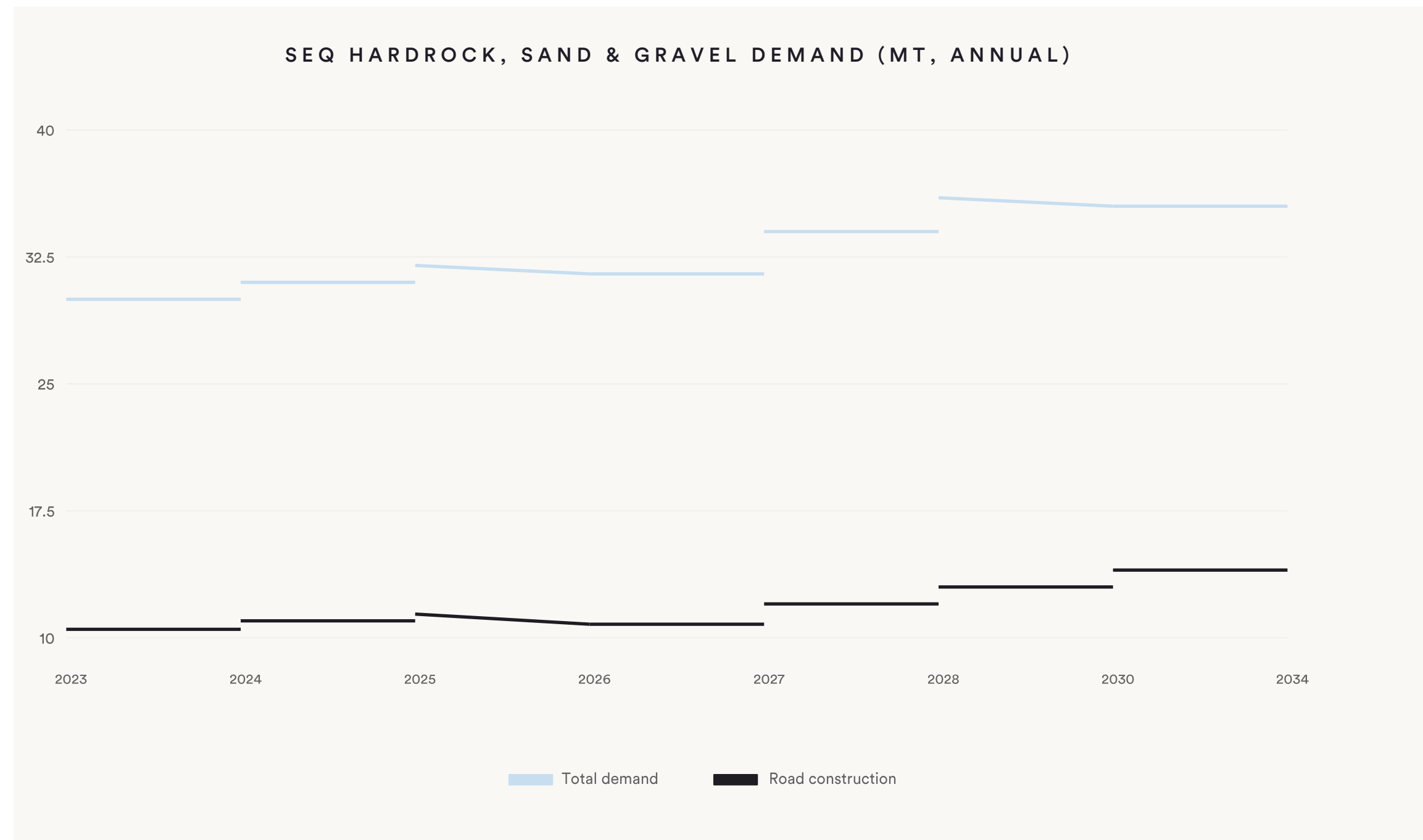
THE ASK: practical, time-bound reforms that increase proximate supply, move each tonne more efficiently, and restore investment confidence.c

Demand is moving faster than the system built to supply it



DEMAND PROFILE

SEQ hardrock, sand and gravel demand is rising through the delivery window.



32Mt

estimated SEQ demand
in year to June 2025

36Mt

forecast peak by 2027/28

What is driving the profile?

- **Roads:** Coomera Connector, Gateway, Logan, Bruce Highway and Pacific Motorway works.
- **Non-residential:** hospitals now; venues and accommodation toward 2032.
- **Housing:** recovery in detached and medium/high-density dwellings as population pressure builds.

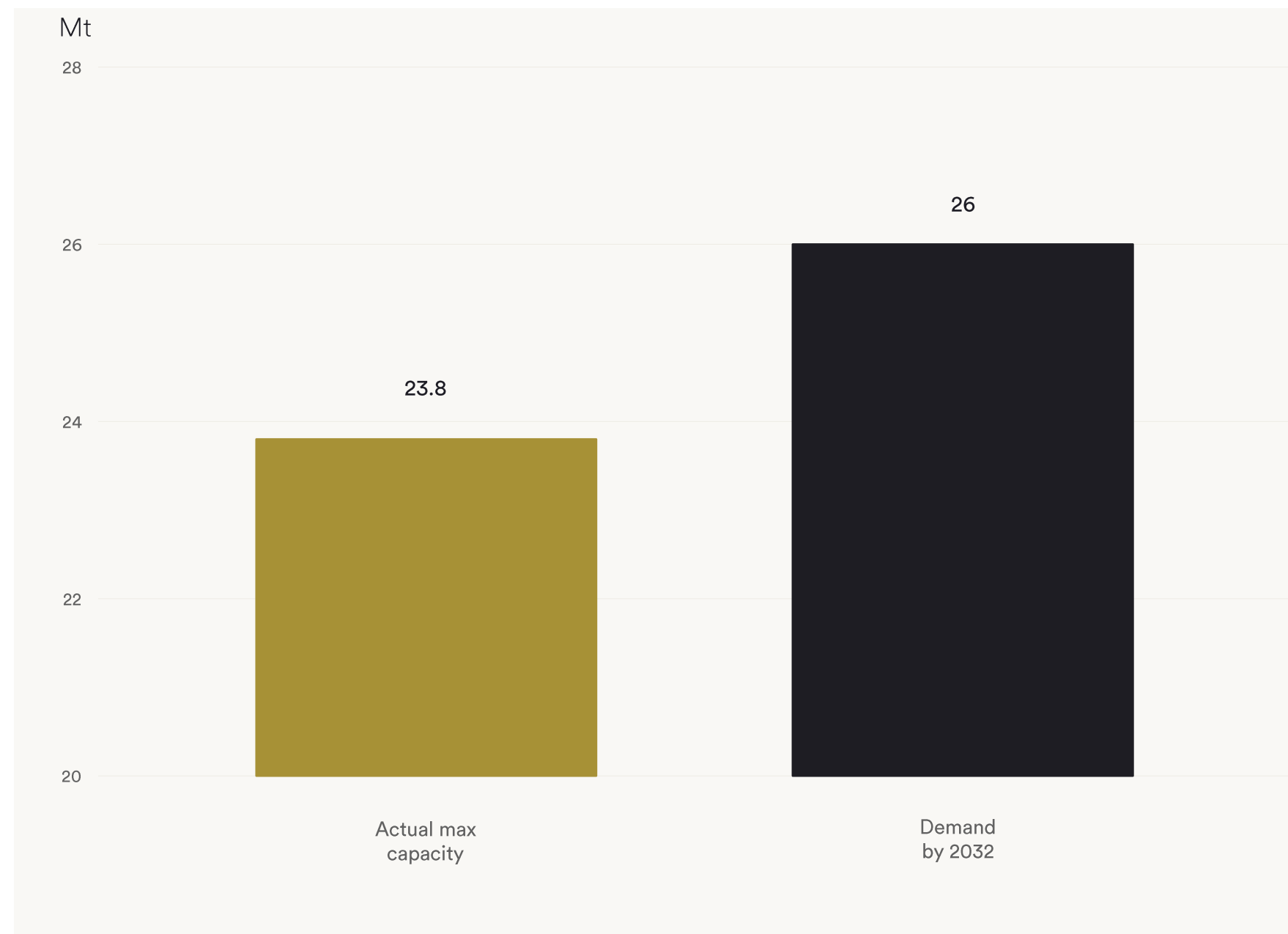
Sources: CCAA 2025 conference presentation; Macromonitor SEQ quarry capacity assessment, Sept 2025; CCAA policy correspondence, 2025–26.



The hardrock pinch point is the immediate risk

Annual output, not only geology, is the binding constraint.

SEQ HARDROCK DEMAND VS PRACTICAL CAPACITY



Actual maximum production exceeded from 2026/27; authorised production exceeded from 2027/28 onward.

Sources: CCAA 2025 conference presentation; Macromonitor SEQ quarry capacity assessment, Sept 2025; CCAA policy correspondence, 2025–26.

The problem is not only reserves

Hardrock reserves may exist, but annual output is constrained by approvals, caps, operating hours, truck movements and risk settings.

The gap is structural

CCAA submissions identify the risk as accumulated capacity attrition from non-approvals, long delays and difficulty securing timely quarry approvals.

The implication for transport

More demand will be pushed to more distant supply unless the state enables responsible uplift from quarries closest to projects.

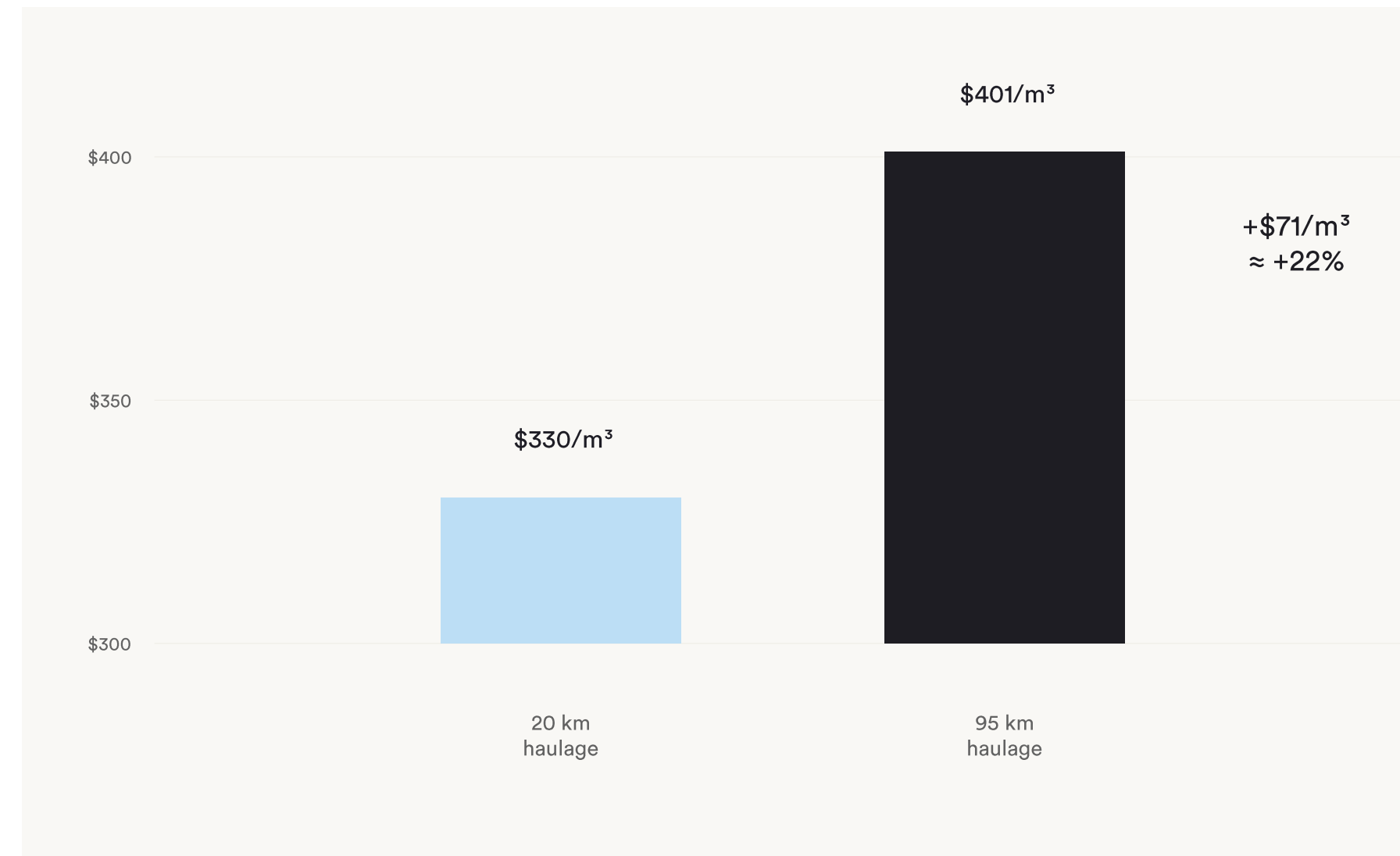
Why proximate supply matters: distance becomes cost



COST AND COMMUNITY IMPACT

The public-interest case for local supply is cost, emissions and fewer avoidable truck kilometres.

CONCRETE PRICE IMPACT FROM AGGREGATE HAUL DISTANCE



29–48%

increase in aggregate costs when haul distances rise by 45–75 km

13–22%

flow-through increase in concrete prices

When local supply is constrained

- Demand shifts to more distant sources.
- Truck kilometres, fuel use and emissions rise.
- Road wear and network impacts increase.
- Infrastructure budgets and housing affordability absorb the cost.

“The tonne closest to demand is the tonne with the lowest cost, lowest truck kilometres and lowest community impact.”

Sources: CCAA 2025 conference presentation; Macromonitor SEQ quarry capacity assessment, Sept 2025; CCAA policy correspondence, 2025–26.



Policy reform 1: brownfield quarry uplift

Unlock responsible annual output from existing sites closest to demand.

Trigger

- State declares a construction materials supply need for SEQ / state-significant projects.
- Time-limited infrastructure delivery period through 2032.

Eligibility

- Existing approved quarries proximate to demand.
- Demonstrated reserves, compliance record and operational capability.
- No material new disturbance footprint required for uplift.

Concession

- Two-tier approach: (1) a 10–15% uplift above approved production caps for eligible sites; and (2) larger uplifts for strategic supply quarries under tighter operational and reporting conditions.
- State override or concession to annual DA production caps.
- Project-linked flexibility on hours and truck movements where safe and compliant.

Safeguards remain

- Environmental authority conditions, dust, noise, water, blasting, rehabilitation, traffic management and community reporting continue to apply.

Governance

- Participating sites report uplift volumes, transport movements and compliance data; concessions are reviewed annually and sunset when demand normalises.

More local tonnes less avoidable haulage.

Policy reform 2: move more tonnes with fewer movements



FREIGHT PRODUCTIVITY

Where the network can safely support it, prefer more tonnes per movement.

CCAA members are high-volume users of PBS truck-and-dog combinations carrying up to 45 tonnes of payload. Expanding access to suitable freight corridors would allow more material to be delivered with fewer truck movements.

WHY IT MATTERS

- Up to 45 tonnes of payload per movement on approved PBS truck-and-dog combinations.
- Fewer truck movements required to deliver the same volume of construction materials.
- Lower freight costs for infrastructure and housing projects.
- Reduced congestion, emissions and road network impacts.

“Where the network can safely support it, move more tonnes per movement.”

1
Define corridors
Identify quarry-to-project routes serving state-significant demand.

2
Expand Access
Enable broader access for approved PBS truck-and-dog combinations carrying up to 45 tonnes of payload where network capacity permits.

3
Keep controls
Telematics, route conditions, time conditions and compliance reporting.

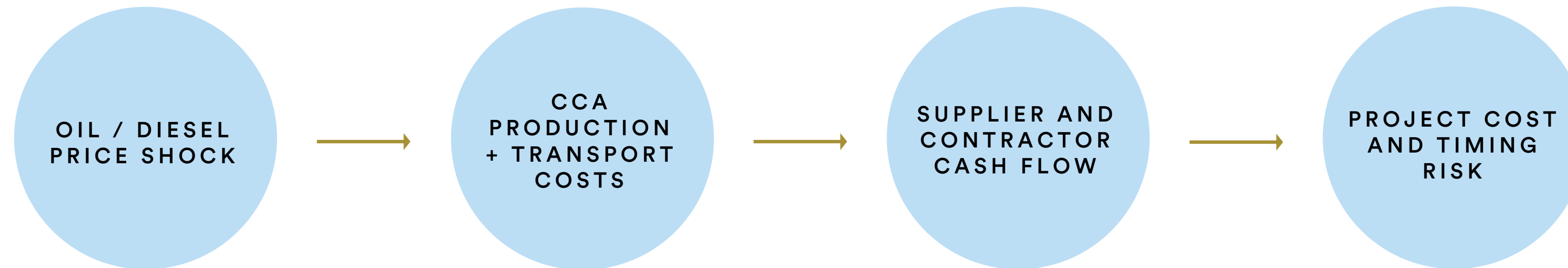
4
Review annually
Publish access settings linked to demand, safety and network performance.

Sources: CCAA 2025 conference presentation; Macromonitor SEQ quarry capacity assessment, Sept 2025; CCAA policy correspondence, 2025–26.



Fuel shocks are now a delivery risk

Low-margin, high-volume materials supply cannot absorb sustained diesel shocks without contract pass-through.



Annexure E — project contract mechanism

- Recognises extraordinary fuel and geotextile cost movements on eligible TMR contracts.
- Protects supply-chain cash flow by enabling a defined pass-through at the project level.

FWC Road Transport Contractual Chain Order

- Requires road transport contractual chains to respond to fuel cost movements.
- Complements rise-and-fall mechanisms so transport operators are not left carrying the shock.

CCAA POSITION: Treat heavy construction materials as essential supply and require Annexure E-equivalent treatment across all state procurement agencies.

Reedy Creek and the bigger KRA confidence test



PLANNING CERTAINTY

Message discipline: certainty, supply continuity and public cost — not only a local dispute.

WHAT CHANGED

- KRA designation**
Signals strategic state interest in long-term extractive resources.
- Call-in and withdrawal**
Project becomes politicised and exposed to localised campaigns.
- KRA removal**
Creates a signal that formally identified resources may not have durable policy support.

THE RISK IS BROADER THAN ONE PROJECT

Investment confidence

Quarries require upfront capital, long approval paths and multi-decade investment horizons.

Sovereign-risk signal

Retrospective weakening of KRAs can suggest state interests are reversible under political pressure.

Future greenfield supply

Brownfield uplift is necessary, but depleting reserves will still require replacement capacity.

State planning reform

KRAs need stronger protection, transparent amendment rules and a credible state-led approval pathway.

West Burleigh is expected to be depleted within the next 7-8 years, with no equivalent approved replacement source currently available for the southern Gold Coast

Sources: CCAA 2025 conference presentation; Macromonitor SEQ quarry capacity assessment, Sept 2025; CCAA policy correspondence, 2025–26.

The communications response: make the public interest visible



PUBLIC TRUST

Planning disputes are now fought in the public arena. Technical arguments alone will not protect strategic supply.

- 1 Reframe**
From “quarry expansion” to infrastructure, housing and cost-of-living supply. Use “local tonnes = lower truck kilometres”.
- 2 Evidence**
Publish simple factsheets on demand, haulage cost and safeguards. Use third-party data where available.
- 3 Local trust**
Put local jobs, contractors, customers and project users into the story. Explain controls plainly.
- 4 Rapid response**
Track claims on social channels. Correct misinformation quickly, respectfully and repeatedly.

PRACTICAL ACTIONS BEFORE THE NEXT FLASHPOINT

- Community explainer pack
- Spokesperson training
- Local supply-cost calculator
- Social listening + rapid rebuttal
- Project customer coalition
- Quarterly supply dashboard

Sources: CCAA 2025 conference presentation; Macromonitor SEQ quarry capacity assessment, Sept 2025; CCAA policy correspondence, 2025–26.



What Queensland must do now

Aim: more proximate tonnes with fewer avoidable impacts.

1 Legislate a brownfield uplift pathway

Enable responsible production-cap, hours and movement concessions for existing quarries closest to demand.

2 Lift freight productivity on suitable corridors

Apply mass/access concessions for CCA heavy vehicles with telematics, route controls and network checks.

3 Standardise fuel pass-through

Adopt Annexure E-equivalent mechanisms across all state procurement agencies.

4 Rebuild KRA and greenfield certainty

Utilise upcoming State Planning Policy Review to strengthen KRA protection, state-led approval pathways and transparent amendment processes.

5 Refresh the evidence base with government

Jointly update supply, demand, project phasing to and beyond 2032.

More proximate tonnes with fewer avoidable impacts

Partnership model: industry commitments and government decisions



DELIVERY PARTNERSHIP

CCAA is not asking government to carry this alone. Industry has its own obligations.

What industry will do

- Invest in brownfield and greenfield capacity where policy settings make additional output bankable.
- Meet and exceed environmental, safety and community expectations.
- Adopt telematics, route discipline and higher productivity vehicles where appropriate.
- Share aggregated supply, demand and cost data with government.
- Improve public communication around the role of construction materials.

What government needs to do

- Treat heavy construction materials as essential infrastructure inputs.
- Create time-limited legislative uplift mechanisms and consistent procurement protections.
- Coordinate TMR, Resources, Planning, Treasury and procurement agencies around a single supply plan.
- Strengthen KRAs and approval pathways so future supply can attract long-term capital.
- Keep the infrastructure spend profile transparent and deliverable.

Thank you!

Michael Kilgariff | CEO, CCAA

ccaa.com.au