



File Note

Investigation 554 – Concrete underlay film from Malaysia

InfraBuild – Australian market information

1. Background

The Commission sought information from InfraBuild in relation to its supply arrangements, and the Australian market for concrete underlay film/builders films.

2. Tender/supply arrangements

InfraBuild described that in relation to the tender for supply to the Australian Reinforcing Company and InfraBuild Construction Solutions during the investigation period, a Request for Proposal (RFP) was submitted to all suppliers that indicated an intention to tender for all or some regions and that suppliers tendered on products that they intended to supply.

InfraBuild provided the Commission with details of the scope of the tender negotiations, including parties that submitted an RFP and those that were shortlisted. These are contained in **Confidential Attachment A**.

InfraBuild described the relevant factors that contributed to the supplier(s) chosen for the goods. These are also set out in **Confidential Attachment A**.

InfraBuild provided details of its supply arrangements for concrete underlay film since 1 March 2017 and following the tender process (i.e. by customer and region). InfraBuild described that tender documents, contracts and pricing information should be sourced from suppliers directly.

3. The Australian market

InfraBuild provided the following comments in relation to the Australian market for concrete underlay film/builders films:

The use of concrete underlay in Australia is predominantly in the residential and industrial segments. Australian Standard AS 2870 specifies certain requirements (e.g. grade and thickness) based on regional applications. For example, high impact grade is specified in NSW and SA. For the other regions, medium impact grade is specified. In SA, high impact orange is preferred over high impact black.

There are a number of suppliers of concrete underlay in Australia; the majority of them are importers and one or two are local manufacturers.

Recently, due to the global pandemic, international shipping arrangements have been challenged. Costs of concrete underlay from overseas have increased significantly. Due to lockdowns in manufacturing countries (e.g. Malaysia), the flow of supply to Australia has been challenging.