



ANNUAL REPORT 2021

IRISH CONCRETE FEDERATION



INDUSTRY MISSION STATEMENT

We will be a customer driven, service oriented, quality business.

We will be viewed by our community and Government as an environmentally responsible industry that operates in a safe and healthy manner.

We will create a work environment where our employees are highly trained and empowered to anticipate customer needs.

We seek to develop successful and mutually beneficial relationships with customers, suppliers, communities and the construction industry.

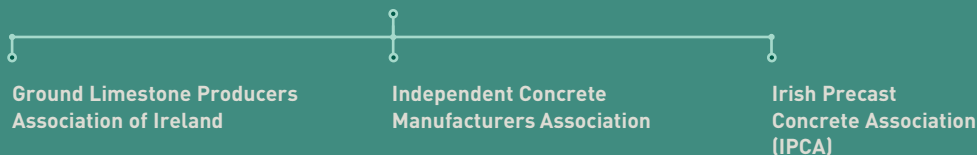
The concrete products industry will continue to be successful.

The concrete products industry will be guided by positive leadership among the many strategies to be utilised in achieving these goals.

The End Result;

Adequate return on investment & a secure future

IRISH CONCRETE FEDERATION (ICF)



AFFILIATIONS

ICF is a member of ERMCO, European Readymix Concrete Organisation and of UEPG, the European Aggregates Association. IPCA is a member of BIBM, the European Federation for Precast Concrete.

ERMCO

EUROPEAN READY MIXED CONCRETE ORGANIZATION

European Ready Mixed Concrete Organization (ERMCO)



Union Européenne des
Producteurs de Granulats



European Federation
for Precast Concrete

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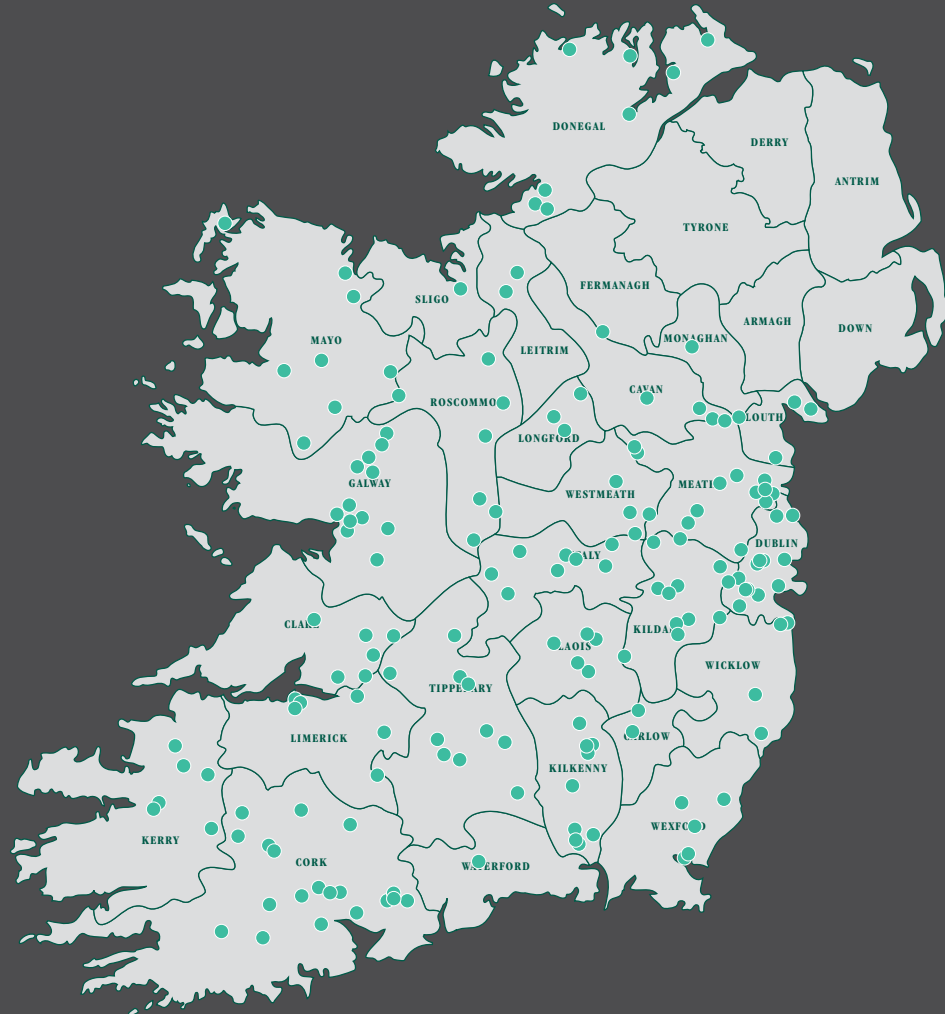
ICF Council
Members 2021

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Cover photo: Skate Bowl and Plaza at Le Fanu, Ballyfermot – Overall Winner of 39th Irish Concrete Society Awards
Major Suppliers: Roadstone.



ICF MEMBER LOCATIONS 2021



INDUSTRY FACTS (ESTIMATED)



Industry output of aggregates (stone, sand and gravel) amounted to approximately **38 million tonnes** in 2021



There are approximately **220** concrete manufacturing locations and **350** large active quarries in Ireland



Industry output of readymix concrete was approximately **4.75 million m³** in 2021



Agricultural lime output in Ireland was approximately **1.3 million tonnes** in 2021



Industry output of concrete blocks in 2021 was approximately **135 million units**



The value of exports of precast concrete to the UK was approximately **€135 million** in 2019

FOREWORD BY THE PRESIDENT, CHRISTY LOUGHNANE



It gives me great pleasure to introduce the annual report of the Irish Concrete Federation (ICF) for 2021. Our annual report will provide readers with an overview of the activities of the federation for the past year and I hope that you will find it to be informative and interesting.

On a personal note, I would like to thank the ICF Council for nominating me as President of the federation for a second time. I am also grateful to ICF members who ratified my appointment at our most recent Annual General Meeting.

I would like to pay tribute to my predecessor as President, Caroline Quinn of Concast Precast for her stewardship of ICF over the past two years. Caroline was a charismatic and determined leader during her tenure, which coincided with the most profound shock to our business and personal lives in living memory. Thankfully the most severe impacts of the pandemic are receding into history and ICF and its members will emerge in typically resilient fashion thanks in no small part to Caroline's leadership. I look forward to serving with Caroline on Council during my Presidency.

The ICF has played a central role in the quarrying and concrete manufacturing industry since its formation almost three decades ago. In that time ICF has overcome many challenges and to this day remains the single representative voice for the quarrying and concrete manufacturing sector in this country. I am confident that ICF will continue to evolve and prosper and meet new challenges and opportunities for the benefit of its members and society in the years to come.

While as operators, our primary concern will always be the sustainability of our own businesses, no entity exists in splendid isolation and knowledge of the wider business, economic, political and technological environment in which we operate is essential for modern business leaders. Organisations like ICF are essential to keeping companies like my own informed, in order to positively influence strategic decision making that will sustain our businesses into the future.

My overriding priority as President is to encourage new and imaginative participation in ICF from the next generation of business leaders in the quarrying and concrete sector. These new voices are needed at all levels of the organisation, from businesses big and small and from all regions of the country. In the coming months there will be new members appointed to Council to replace those who have generously and expertly contributed to ICF over the past decade and longer. It is this service, provided for the betterment of the entire industry, which has allowed ICF to flourish, thereby providing a solid footing for its future.

While stewardship of the federation is the responsibility of the Council, the 'work engine' of the organisation are the policy committees which operate across a broad range of disciplines and business areas. Our committees serve the dual purpose of harnessing members' expertise to form policy and equally importantly, facilitating the sharing of knowledge throughout the membership. Our committees are open to all members and I take this opportunity to encourage participation on our committees by personnel in members' businesses throughout the country.

FOREWORD BY THE PRESIDENT, CHRISTY LOUGHNANE

Our Chief Executive will give a more detailed report on some of the activities of our organisation over the past year and in particular the work of our policy committees and constituent associations. I will mention just a few highlights.

Our Health and Safety Committee was once again to the fore in providing guidance and advice to members on reducing the risk of transfer of Covid in the workplace. Equally important is the ongoing work of the committee in assisting the effective communication of safety to employees and I know the committee is currently developing new communication tools to assist us in this important work. Our Planning and Environment Committee continued the development of national end-of-waste criteria for recycled aggregates from waste concrete, a key element of the circular economy within the construction sector. Indeed, sustainability will feature prominently on the ICF agenda in the coming year as our industry continues to play its part in contributing to a more sustainable society for future generations. Our Transport Committee is working on a submission to deliver substantial emission reductions from our transport fleet by harnessing the benefits of modern design to deliver reduced journeys and fuel usage and while our Technical Committee continued to contribute to the development of product standards and associated guidance and commenced the development of Environmental Product Declarations for some key products.

The Irish Precast Concrete Association and the Ground Limestone Producers Association of Ireland also continued their busy programmes of work throughout the year. The ability of our precast concrete manufacturers to continue to grow their markets, both in Ireland and the UK, given the challenges posed by Brexit and the pandemic is truly remarkable and an indication of what can be achieved within our sector. The preparatory work of IPCA members, conducted in advance of the introduction of the new trading arrangements with the UK in January, was certainly rewarded. Similarly, the Ground Limestone Producers Association of Ireland was highly involved with stakeholder organisations in promoting the benefits of lime to the farming community, including improved farm enterprise productivity and reduced agricultural emissions.

“

ORGANISATIONS LIKE ICF ARE ESSENTIAL TO KEEPING COMPANIES LIKE MY OWN INFORMED, IN ORDER TO POSITIVELY INFLUENCE STRATEGIC DECISION MAKING THAT WILL SUSTAIN OUR BUSINESSES INTO THE FUTURE.

In conclusion, I would like to thank the members for their support for their representative body in 2021 and my fellow Council members for their guidance and expertise which is generously given. Finally, a sincere word of thanks to the staff of the ICF for their commitment and professionalism over the past twelve months



Christy Loughnane
President



University College Cork Student Hub. Building Category Winner, 39th Irish Concrete Society Awards. Major Supplier - Kilsaran International.

CHIEF EXECUTIVE'S REPORT



The old adage ‘jumping from the frying pan into the fire’ springs to mind when trying to summarise the impact of recent global events on our personal and business lives. While Covid is thankfully receding in our rear-view mirror at time of writing, the war in Ukraine has erupted. Without going into the politics of the Russian invasion of Ukraine, I am sure we all look with horror at the immense hardship brought up on the people of Ukraine and we can only hope that eventually diplomacy will prevail and an end can be brought to this needless war.

Hopefully, we are in a position to say that the worst impacts of the pandemic are finally behind us. While it seems there will be some level of caution required in respect of new variants, we are hopeful that there will be no return the days of ‘lockdowns’ and public health restrictions. Nevertheless, any retrospective analysis of the impact of Covid on our sector will show that other sectors of the economy, particularly hospitality, were much more seriously impacted than ours. There are many reasons why this was the case. However, the principal reason is the essential nature of this industry and the products it produces. This was exemplified by the fact that during times of severe economic and public health restrictions, our industry was required to continue to supply essential societal infrastructural development throughout Ireland. Thankfully, this resulted in strong levels of activity among our member companies over the past two years.

If I have a single criticism of our industry, it is that sometimes we underplay our essential role in society. If this is the case, we can hardly expect society to view this industry any differently. Our products are essential for modern society to function normally. Critical gaps in national infrastructure cannot be filled without our

industry’s materials. Yet policy makers and decision makers rarely grasp these undeniable facts. Organisations such as ICF have a critical role in promoting and advocating for a greater official recognition of our industry’s essential role. This needs to be backed up by members ‘at ground level’ promoting the benefits that their businesses bring to their communities. ‘All politics is local’ and the role of our members in supplying products for local infrastructure, purchasing materials and services from local suppliers and employing local people is an important strength which should not be taken for granted.

As I mentioned in last year’s Annual Report, being allowed to open as an essential business is one thing, staying open is another. At this point I would like to say a word of gratitude and well done to all our members for their efforts to keep their businesses operational throughout the past two years, particularly the effort that went into adopting new practices and procedures in places of work to keep everybody safe.

Certainly, at the current time of writing, the economic outlook is favourable looking forward. One only had to read the Central Bank’s forecasts for economic growth for the coming year, released in January, to see that all the indications are that 2022 will be a busy and active year for our members and business in general. Government’s “Housing for All” strategy and the “National Development Plan” should underpin demand for new social, environmental and economic infrastructure in the coming years, as our country’s population grows, thereby creating sustainable demand for our industry’s products.

While the outlook for activity levels is positive, the challenge of supply chain inflation is now impacting directly on members. Increases in energy and raw

material costs as well as insurance, labour, fuel and other services all directly impact on the competitiveness of the sector which will in turn lead to increased upward pressure on the cost of building. This trend shows no sign of reversing as anyone who monitors the cost of construction raw materials, energy and carbon will know. We in ICF will do our utmost to keep members informed on likely future developments in the areas of energy and fuel cost trends, as well as reform of the Emissions Trading Scheme and the related cost of carbon. These issues, which not so long ago were of limited concern, are now having a significant impact on our members' cost base. In this context, ICF is currently updating our annual publication on the contribution that our industry's materials make to overall housebuilding costs, which we will share widely with members, media and other stakeholder organisations alike, given the likely focus on this area in 2022.

I have mentioned the cost of carbon and it is a fact that, relatively speaking, this industry produces a carbon intensive product – a reality that will increasingly come under the spotlight in the coming years. Clearly our sector must respond in a responsible manner to the challenges that climate change presents. While continuing to highlight the immense benefits that their materials will continue to bring to society in the future, our members must be seen to do all they can to reduce their impacts to provide a sustainable future for society as well as the next generation of quarry and concrete manufacturing operators. Similarly, ICF must have a clear vision of our industry's future role in contributing to future sustainable societal development in this country. In 2022, ICF will develop a plan for the organisation to address both the challenges and opportunities that climate change will bring to our sector, with a view to fully resourcing this area within the organisation.

In the same vein, and with thanks to the many years of work by our Planning and Environment Committee and the guidance of Liam Smyth, our members' quarries are on a much better planning footing than in years gone by. Yet much remains to be done. Planning authorisation is becoming ever more contentious, both between communities and industry and within the industry. As was the case last year, ICF strongly urges our members, in the interests of the future of their own businesses, to ensure that their planning authorisations on all activities are up to date and ICF will continue to assist its members in achieving this objective.

The planning system itself has been the subject of much criticism from many quarters in recent times. We note the decision of Government in September to review planning legislation and reform the judicial review process. In the coming year ICF intends to publish a data-based report to

illustrate the declining reserves of authorised aggregate reserves in Ireland and the threat that this poses to future societal and infrastructural development.

Given the high public focus on damaged blockwork to houses in 2021, at its December meeting our Council highlighted the need to address the reputational damage caused to our industry, particularly in relation to the manufacture of concrete blocks. This is a complex task and will require positive engagement by ICF with many stakeholder organisations at many levels. ICF fully recognises the devastation caused to affected homeowners arising from damage to blockwork in their homes through no fault of their own. In recognising the plight of affected homeowners, ICF will actively support any official investigative process into this matter if requested.

Notwithstanding the fact that the worst effects of Covid are hopefully behind us, the Health and Safety Committee has a busy year ahead. We have already developed a full agenda for 2022, the first fruits of which will be soon visible with the release of a series of toolbox talk safety videos, suitable for dissemination throughout the industry. ICF is also planning a safety awards event for the second half of the year. However, we must never forget that our industry is a high-risk one, and the same risks that existed Covid are still there. Tragically we had a fatal accident in the industry in the past year - a stark reminder to all of us of the need to keep safety to the forefront of our minds every day at work. We will continue to work closely with the Health and Safety Authority to assist and advise members on all safety matters and develop new tools and initiatives to promote best practice in safety at all levels across our membership.

Our Technical Committee, again with the guidance of Liam Smyth, has made a major contribution to committees and panels within the National Standards Authority of Ireland and CEN for many years and much unseen work is carried out by these technical experts for which we are extremely grateful. ICF will continue to contribute to the development of standards and do our utmost to keep our membership updated on the ever-changing nature of standards both at European and national level. As ever ICF urges all members to ensure that they are fully familiar and compliant with all product standards and guidance and we intend to run briefings for members in this area throughout the coming year, public health guidance permitting.

While our planned social media and digital advertising campaign for 'concrete built' construction was significantly reduced in 2021, I would like to pay tribute to our recently departed colleague Joanne Boylan, who made a major contribution to the 'concrete built' promotional campaign

of recent years, some of the results of which are visible on concretebuilt.ie. I would also like to commend the promotional work of the Ground Limestone Producers Association of Ireland (GLPAI) on the promotional campaign behind the association's brand 'Grolime', with the valued assistance of Teagasc and the Department of Agriculture & Food with whom we have developed mutually beneficial relationships in recent years.

The ability of the industry to attract and retain new employees was another of the priorities the Council identified at its December 2020 meeting. There is intense competition for labour and talent in today's marketplace, a fact that has been long recognised by our Transport Committee with regard to the availability of new commercial drivers. The development of our IR/HR service in 2020, which is delivered by Stratis Consulting, has been highly valued and well received by members. This service further evolved into the development of a HR Forum in 2021 to discuss and disseminate information on developments on the HR/IR landscape to the membership. In the coming year we hope to further develop the scope of the service to look at ways our sector can attract and retain staff and provide a career path for our employees by recognising the skills, training and qualifications of this industry's most valuable asset.

I will now give a short report on some of the activities of our Council and committees. Obviously, it is impossible to report on the entirety of the organisation's achievements, but I hope it will inform readers of the nature of our efforts on behalf of members.



ICF COUNCIL

The members of the ICF Council in 2021 were:

Ms Caroline Quinn

Concast Precast Group, President

Mr John Farragher

Concrete Manufacturing Company

Mr Larry Byrne

Roadstone

Mr Peter Gleeson

Gleeson Quarries

Mr David Wright

Wright Quarry Products

Mr Christy Loughnane

Loughnane Concrete (Birr)

Mr Derry McKeown

Kilsaran International

Mr Finbarr O'Neill

Finbarr O'Neill

Mr Frank Healy

Ducon Concrete

The first meeting of the Council in 2021 took place following the unexpected new public health restrictions introduced by Government in January arising from the resurgence of Covid in Ireland. The closure of non-essential construction was certainly not the start to the year that we had hoped for. Under the guidance of the Council, ICF hosted immediate member briefings on the Covid situation, on Government supports for businesses and to provide clarity on the definition of essential construction. Throughout the year the Council monitored ongoing developments related to Covid, particularly in the area of employee safety and wellbeing.

The Council oversaw a submission in response to the public consultation and call for expert evidence on the Climate Action Plan 2021 by the Department of Environment, Climate and Communications. ICF also made a submission to An Garda Síochána on the supervision of blasting operations in ICF member quarries. Sustainability will figure prominently on the Council's agenda in 2022 and it is currently in the process of commissioning the development of a sustainability plan for the organisation. The Climate Action Plan published by Government in November presents a challenge to those of us in concrete construction, not only to reduce emissions associated with concrete manufacturing but also to communicate the sustainability benefits of concrete in a more comprehensive manner. This will be a key element of our sustainability plan.

Throughout the second half of 2021 the Council monitored the increasing pace of inflation in raw material costs arising from material shortages, Brexit, Covid related delays, combined with strong demand in the global marketplace. In March the Council oversaw the publication of the annual analysis of the contribution of quarried and concrete material costs to overall house building costs, which is available on the ICF website. The Council examined the implications of Phase IV of the Emissions Trading Scheme for the industry and supported the formation of a Human Resources Forum within the federation, building on the new IR/HR service introduced in 2020. The Council closely monitored developments related to damaged blockwork in houses which gained national profile throughout the year. In November, a delegation of the Council met with Cement Manufacturers Ireland on the emerging implications for the raw material cost base of our members, arising from ongoing reform of the Emissions Trading Scheme.

Responsibility for the organisation's finances, which remains on a solid footing, lies with the Council with the valued assistance of our Financial Controller and Company Secretary Patricia Craig. The Council introduced a new reduced level of subscription for ICF membership to come into effect from January 2022. In this respect, I would like to thank all of our members and members of Cement Manufacturers Ireland for their support to ICF during the year.

HEALTH AND SAFETY

The members of the Health and Safety Committee are as follows:

Ms Nicky Mulchrone
McGraths Limestone, Cong (Chairperson)

Mr Vincent Flanagan
B D Flood

Mr Noel Morgan
Flood Flooring

Mr Clive Carty
Roadstone

Mr John McWeeney
CRH

Mr Brian Coogan
Wright Quarry Products

Mr Ian Hall
Wright Quarry Products

Ms Emma Murphy
Harrington Concrete & Quarries

Mr Mark Patterson
Kilsaran Precast

Mr Paul Gallagher
Ducon Concrete

Mr Brendan Donagher
Concast Precast

Mr Mark O'Dea
Techrete

Mr Paul Maher
Kilsaran International

Mr David Whyte
Shay Murtagh Precast

Mr Dennis Byrne
Irish Industrial Explosives

Mr Gerry Reidy
Irish Cement

Mr Jamie Barrett
Banagher Precast

Mr Cillian Casey
Keohane Readymix

Mr Paul Conway
Kellys of Fantane

Mr Paul Clarke
O'Reilly Concrete

Mr Clive Kelly
Clive Kelly Safety

Once again, the ICF Health and Safety Committee and the Health and Safety Authority (HSA) collaborated for the Spring Quarry Safety Campaign which took place in March and focused on vehicle and pedestrian safety. I would like to thank all our members who participated in the online workshops as well as presenters from the HSA and our own committee. During the campaign the HSA carried out 100 inspections of quarries throughout Ireland. ICF will endeavour to ensure that the HSA maintains a high visibility in the quarrying sector to constantly reinforce the importance of safety among our membership.



Given the high levels of Covid experienced over the Christmas period, health and safety personnel throughout our industry were immediately refocused on reducing the risk of transfer of the virus in the workplace at the beginning of the year. The Health and Safety Committee kept members updated on best practice in reducing virus transmission, including the introduction of antigen testing in many members locations.

Tragically there was a fatality in a member's workplace during the year, once again reinforcing the need to constantly maintain safety awareness in the industry. As a result, the Health and Safety Committee undertook a new initiative to improve the communication of risk to employees in our industry. With the guidance of the new ICF Health and Safety Manager Aine Healy, the committee commenced the development of a series of short quarry safety videos to complement existing training in the industry. The first videos were shot in November and we hope that we will be in a position to launch up to 20 safety videos during "Spring Quarry Safety Campaign 2022".

During the year ICF continued to participate on the HSA Quarry Safety Partnership and supported the All-Island Quarry Safety Conference which was held online in November.



TRANSPORT COMMITTEE

The members of the Transport Committee are as follows:

Mr Christy Loughnane
Loughnane Concrete (Birr) (Chairman)

Mr Conan Curley
Killeshal Precast Concrete

Mr Denis Doyle
Doyle Concrete

Mr Brendan Dunne
Roadstone

Mr T J Lennon
Lennon Quarries

Mr Roy Hegarty
Kilsaran International

Mr Michael Keohane
Keohane Readymix

Mr Micheál Gleeson
Gleeson Concrete

Mr Shane Tierney
B D Flood

Mr Damien McGrath
McGraths Limestone, Cong

As was the case in 2020, the ICF Transport Committee prioritised the implementation in Ireland of the derogation from the requirements of Articles 5-9 of Regulation 561/ 2006 - European Communities (Road Transport) Regulations for readymix concrete deliveries. Notwithstanding the reality that this derogation represents a small element of the EU's overall Mobility Package, ICF is disappointed that the Department of Transport has not yet implemented the derogation in Ireland, despite supporting its introduction at EU level.

We hope that this legislation will finally be enacted in Ireland in 2022.

The Transport Committee also developed a risk assessment with input from our Health and Safety Committee to support license applications to local authorities for diesel storage tanks as required under the Dangerous Substances (Flammable Liquids and Fuels Distribution and Commercial Supply Stores) Regulations, 2019.

Towards the end of the year the committee commenced the development of a submission to seek changes in the maximum permissible weights for some vehicles in our members' delivery fleets to take account of modern design and harness the substantial benefits of reduced trips, fuel consumption, fuel costs and emissions. It is hoped that a submission will be made to the Department of Transport, the Road Safety Authority and Transport Infrastructure Ireland in early 2022.

PLANNING & ENVIRONMENT COMMITTEE

The members of the Planning and Environment Committee are as follows:

Mr Fergus Gallagher

Kilsaran International (Chairman)

Mr Stephen Linden

Mannok

Mr Billy McGrath

McGraths Limestone, Cong

Mr Ronan Griffin

CRH

Mr John Glynn

Roadstone

Mr Vincent Flanagan

B D Flood

Mr Mark Galvin

Ardfert Quarry Group

Ms Amanda Tarpey

Harrington Concrete and Quarries

Mr John Quirke

M F Quirke & Sons

Ms Sarah O'Connell

O'Connell Concrete

Mr Brian Downes

Breedon Ireland

The Planning and Environment Committee considered the amendments to the Planning and Development Act 2000, passed in late 2020. In addition, the committee progressed the development of a risk assessment on the production of recycled aggregates from waste concrete as requested by the Environmental Protection Agency. Sampling of materials commenced in December and the ultimate objective is to influence the development of national end-of-waste criteria for aggregates recovered from waste concrete.

TECHNICAL COMMITTEE

The members of the Technical Committee are as follows:

Mr Alan Lowe

Roadstone (Chairman)

Mr Peter Deegan

Banagher Precast

Mr William Farrell

Killeshal Precast Concrete

Mr Tom Holden

Roadstone

Mr Diarmuid McCarthy

Roadstone

Mr Richard Bradley

Irish Cement

Mr Aidan Fogarty

Ecocem

Mr Kevin Maguire

Mannok

Mr Gareth McMeekin

Wright Quarry Products

Mr Keith Goodwin

Kilsaran International

Mr Patrick Cullivan

B D Flood

Mr Éanna Nolan

Irish Concrete Society

Our Technical Committee continued to meet quarterly online during the year. ICF and technical committee members continued to contribute to many National Standards Authority of Ireland (NSAI) panels and committees during the year, in particular the Construction Standards Consultative Committee, the Aggregates Panel, the Masonry Panel, the Concrete Standards Consultative Committee and the TC063 Concrete Blocks Committee.

The review of Standard Recommendation (SR)18 – 'Guidance on Aggregates for Mortar' was completed during the year and will come into effect in 2022. ICF looks forward to contributing to the ongoing review of SR325 – 'Design of Masonry Standards in Ireland to Eurocode 6'. ICF is also contributing to the Department of Housing, Local Government and Heritage guidance on the marketing and use of concrete blocks in Ireland which will be targeted at manufacturers, importers, distributors, specifiers, designers, builders, certifiers and end users. It is hoped that this publication will be published in early 2022. ICF will endeavour to disseminate the guidance as widely as possible to industry.

Members of the Technical Committee are also involved in the development of industry level Environmental Product Declarations for aggregates, readymix concrete and concrete blocks which will commence in 2022. Members of the committee met with the Irish Green Building Council on the development of these EPDs.

Members of the committee who participate on CEN panels contributed to the ongoing consultation on EN 17555- 'Aggregates for Construction Uses' and the committee welcomed a presentation from the NSAI on the second generation of Eurocodes as well as a presentation from

the Department of Housing, Local Government and Heritage on the review of the Construction Products Regulation (CPR). The committee welcomed the CPR Market Surveillance Programme 2021, carried out by the National Building Control and Market Surveillance Office which focused on aggregates and concrete blocks.

CONCRETE DEVELOPMENT GROUP

The members of the Concrete Development Group, which comprises representatives of the Irish Concrete Federation and Cement Manufacturers Ireland are as follows:

Mr Richard Bradley
Irish Cement

Mr Derek Duffy
Kilsaran Precast

Mr Brian Gilmore
Cement Manufacturers Ireland

Mr David Kelly
Hanlon Concrete

Ms Eibhlin Keohane
Keohane Readymix

Mr David McKeown
Kilsaran International

Mr Eamon Finnegan
Breedon Ireland

Mr Diarmuid O'Sullivan
Roadstone

Mr Keith McGrath
McGraths Limestone, Cong

Due to Covid and market developments during the year, the Concrete Development Group's marketing plan was not implemented in 2021. A review of the future role of the CDG will be undertaken in 2022.

BUSINESS DEVELOPMENT COMMITTEE

The members of the Business Development Committee are as follows:

Mr Bernard Quinn
Concast Precast

Mr Barry O'Brien
CRH

Mr Fergus O'Hara
Hanlon Concrete

Mr Francis Harrington
Harrington Concrete & Quarries

Ms Geraldine Grace
Gleeson Quarries

Mr John O'Carroll
Ardfert Quarry Products

Ms Onagh Murphy
Loughnane Concrete (Birr) Ltd

Mr Pat Freeman
McGrath Limestone Quarries, Clare

Mr Pat McGrath
McGraths Limestone, Cong

Mr Thomas King
Wright Quarry Products

Mr Tom Gallagher
B D Flood

Mr Tony Curran
Kilsaran International

The Federation's Business Development Committee did not meet during 2021.

HUMAN RESOURCES

In 2021, a Human Resources Forum was formed for human resources personnel in member companies. This development arose from the addition of an HR service for ICF members in the previous year. The new HR forum comprises mainly HR practitioners and is supported by Stratis Consulting and facilitates the updating of members on recent and pending changes in employment law.

During the year ICF carried out an industry survey of pay and benefits and looks forward to repeating this valuable exercise in 2022. It is hoped that our new HR Forum will eventually address issues such as labour shortages, industry training and upskilling of employees in our member companies.

The members of the ICF HR Forum are as follows:

Ms Aine Black
Shay Murtagh Precast

Ms Caroline McCaffrey
Mannok

Ms Caroline Quinn
Concast Precast

Ms Enda Keenan
Kilsaran International

Mr Garry Byrne
Harrington Concrete & Quarries

Ms Jennifer Flynn
O'Reilly Concrete

Mr Jim Rea
Roadstone

Ms Joan Gover
Breedon Ireland

Ms Linda McGrath
McGraths Limestone, Cong

Ms Mary Lennon
Kilsaran International

Ms Orla Dunne
Techrete

Ms Susanne Atkinson
Wright Quarry Products

IRISH PRECAST CONCRETE ASSOCIATION (IPCA)

The members of the IPCA Council are as follows:

Mr Derek Duffy
Kilsaran Precast (Chairman)

Mr Frank Healy
Ducon Concrete

Ms Caroline Quinn
Concast Precast Group

Mr David Wright
Wright Quarry Products

Mr Darragh O'Reilly
O'Reilly Bros

Mr Brendan Mahon
Banagher Precast

Mr Marcus Sweeney
Techrete

Mr Alan Brennan
Killeshal Precast

Mr John O'Connor
Flood Precast

Mr Paddy Mohan
Mannok

Mr Denis Doyle
Doyle Concrete

Mr John Cleary
Moylough Concrete Products

2021 was yet another busy year for Irish precast concrete manufacturers, both in the Irish and UK marketplace. Despite the imposition of public health restrictions and the resulting closure of non-essential construction sites in Ireland in the early part of the year, activity in the UK market remained busy throughout the year. Similar to our quarrying and readymix concrete manufacturing members, the health and safety personnel within IPCA member companies played a key role on the federation's Health and Safety Committee to keep the industry's employees safe while keeping businesses operational. IPCA members updated their standard operating procedures, risk assessments, signage and internal communications during this period, following guidance from the ICF Health and Safety Committee.

In September, the IPCA and the Health and Safety Authority jointly promoted a safety initiative in prestressed concrete manufacturing locations throughout the country. We would like to thank the Authority for their continued focus on the sector and look forward to repeating this initiative in the near future.

Thankfully, the new trading arrangements for exporters to the UK market which came into effect in January did not have a major impact on IPCA members. In August, IPCA carried out a short survey of members on the impact of these new customs and regulatory arrangements. In general, all respondents indicated that exporting to the UK was proceeding without any major difficulties despite the increased administration burden arising from the need for export declarations, processing of data and invoicing. Constraints in the availability of transport and resulting increasing costs were also reported. It is clear that the groundwork undertaken by our members over the previous two years facilitated a smooth transition to the new arrangements, which hopefully will continue in the future.

Notwithstanding the strong level of demand in the marketplace, the inflationary impact on the cost of raw materials, in particular steel, was impacting negatively on manufacturing costs from mid-year. This trend continued throughout the remainder of 2021 and represents a major threat to competitiveness in the coming year.

GROUND LIMESTONE PRODUCERS ASSOCIATION OF IRELAND (GLPAI)

The members of the GLPAI committee are as follows:

Mr Eoin O'Carroll

Bennettsbridge Limestone (Chairman)

Mr Joe McGrath

McGrath Quarries, Clare

Mr Francis Harrington

Harrington Concrete & Quarries

Mr Christy Loughnane

Loughnane Concrete (Birr)

Mr Fraser Thom

Breedon Ireland

Mr Enda Hanly

Hanly Quarries

Mr Tony Healy

Kilsaran International

Mr Kevin Morrissey

Dan Morrissey & Co

Mr Diarmuid O'Sullivan

Roadstone

Mr Billy McGrath

McGraths Limestone, Cong

Mr Mike Cronin

Michael Cronin Readymix

Mr Peter Gleeson

Gleeson Quarries

Mr Tom McDonald Jnr

Kilcarrig Quarries

Mr Trevor Mortimer

Mortimer Quarries

Mr Andy Fogarty

Fogarty Concrete

The Ground Limestone Producers Association of Ireland (GLPAI) represents 15 companies operating in approximately 30 locations throughout the country that are licensed by the Department of Agriculture, Food and the Marine to produce agricultural lime as a soil pH enhancer.

Sales of agricultural lime grew strongly in 2021 keeping all our members busy supplying their farmer customers throughout the year. Clearly there is a headwind behind the demand for lime, both in terms of increased productivity at farm level and reduced emissions from the agricultural sector. The increasing cost of chemical fertiliser certainly continues to boost lime sales as maintaining optimum soil pH is essential to increasing the availability of soil nutrients and maximising the benefits of applied chemical fertilisers.

The use of lime to maintain optimum soil pH is now being seen as a major element of Government's plan to reduce greenhouse gas emissions from agriculture. In 2020 a target for lime usage in Ireland of 2,000,000 tonnes was set in 'Agclimatise', the Government's roadmap to climate neutrality for Irish agriculture. Farm scale liming programmes are now mandatory for farmers in derogation and are being extended to those farmers exporting slurry to adhere to nitrates limits.

GLPAI participated in the Department of Agriculture's climate change adaptation group and engaged with Teagasc and the Department during the year on issues such as nitrates, the revision of the EU Fertiliser Regulation, the promotion of lime and research into the benefits of lime. GLPAI is also supporting Teagasc research being carried out in UCD on identification of the barriers to the use of lime as well as its environmental benefits in reducing emissions.

The promotion of 'Grolime', the certification mark operated by the GLPAI continued successfully throughout the year thanks to the work of the marketing sub-committee assisted by my colleague Joanne Boylan. A comprehensive promotional advertising campaign in the traditional farming press, digital advertising and social media promotion was undertaken during the spring and autumn, including the development of a new video highlighting the benefits of 'Grolime' to beef production. We look forward to continuing our promotional campaign in the coming year.



Billy McGrath of Grolime Certified Supplier, McGraths Limestone, Cong discusses the benefits of lime with Mayo beef farmer Ger Farragher

EUROPE

ICF is a member of UEPG - the European Aggregates Association, ERMCO - the European Ready Mixed Concrete Organisation and BIBM - the European Precast Concrete Federation and remains highly involved in all three organisations.

ICF is supportive of the work programme of these organisations, particularly in the areas of the environment, technical standards and health and safety. As was the case in 2020, ICF benefited greatly from the exchange of information at European level on the impact of COVID-19 in various countries and the best practice industry responses to curtail the spread of the virus in workplaces.

STAKEHOLDER RELATIONS

As a representative body for a strategically essential sector, ICF greatly depends on its ability to develop linkages and relationships with stakeholder organisations in the wider construction and regulatory sphere. ICF is thankful for the access afforded by these organisations and for their ever-willing agreement to engage with us on a wide variety of issues.

Some of the organisations which ICF engaged with throughout 2021 are included on the following list and I apologise for any inadvertent omission from the list.

- Engineers Ireland
- Enterprise Ireland
- Environmental Protection Agency
- Fertiliser Association of Ireland
- Freight Transport Association of Ireland.
- Geological Survey of Ireland
- Health and Safety Authority
- HomeBond
- Housing Agency
- Irish Concrete Society
- Irish Mining & Quarrying Society
- Irish Water
- Mineral Products Association (UK)
- Mineral Products Association (Northern Ireland)
- National Monuments Service
- National Standards Authority of Ireland
- Office of Permanent Representation of Ireland Brussels
- Road Safety Authority
- Royal Institute of Architects of Ireland
- Society of Chartered Surveyors Ireland
- Solas
- Teagasc
- Transport Infrastructure Ireland
- Valuation Office
- Alliance for Insurance Reform
- All Local Authorities
- An Bord Pleanála
- An Garda Síochána
- An Taisce
- Association of Consulting Engineers of Ireland
- Cement Manufacturers Ireland
- Construction Industry Federation
- Department of Agriculture, Food and the Marine
- Department of Housing, Local Government & Heritage
- Department of Enterprise, Trade and Employment
- Department of Environment, Climate & Communications
- Department of Transport
- Education and Training Boards



Paul Marshall Building, London School of Economics. Winner International Award, 39th Irish Concrete Society Awards. Irish Precast Concrete Exporter - Techrete.

ICF COMMUNICATIONS

As a business representative organisation, ICF relies greatly on its ability to communicate effectively with members and other stakeholder organisations with whom we interact daily. Needless to say, 2021 brought many of the same challenges as the previous year and once again our meetings and events were extremely curtailed due to the public health restrictions. Thankfully, towards the end of the year, we were in a position to hold in-person regional meetings for the first time since March 2020. Let us hope that we can get to 'meet and greet' members and other stakeholders in the traditional fashion again in 2022.

Throughout the year, the federation's work agenda continued to be communicated through our newsletters, news flashes and websites. We operate three websites and our external communications are provided through an ever-increasing presence on social media adding to the visibility of the sector and the contribution it makes.

SOCIAL

Unsurprisingly we were not able to go ahead with our Annual Dinner and Social Weekend this year for obvious reasons. We hope that we will be able to welcome members to our annual social event in 2022 which as usual will be organised expertly by Diane O'Donoghue in our head office.



CONCLUSION

As is the case with all representative bodies, ICF is always seeking involvement in our organisation from our member companies and particularly from those who may aspire to take on the leadership mantle in our industry in the coming years.

Since joining the federation, I have greatly admired the time and efforts put in by the leaders of our Council and committees all for the betterment of our industry. In the coming months, we will see a number of changes on our Council with some long-serving members stepping down to make way for new leaders of the industry, thereby bringing with new ideas and perspectives on the future of this industry. These new Council members will follow in the footsteps of the many who have made such a contribution to building this organisation to what it is today and making such a generous contribution to their industry.

I would like to thank our outgoing President, Caroline Quinn for her leadership of the Federation over the past two years. While Covid upset many plans over her Presidency, Caroline has been a steady, considered and innovative President and we look forward to her continued input on our Council. I would like to welcome Christy Loughnane as incoming ICF President. Christy has always epitomised the contribution and service to

ICF that I referred to earlier and I look forward to working with him again in his capacity as President. I would also like to thank Derek Duffy, Frank Healy and Eoin O'Carroll for their leadership of the various organisations within the ICF.

Once again a word of thanks to the ICF Council, along with Trish Craig, our company secretary and financial controller, for their governance of the organisation and their guidance to me and the other staff members. In addition, a word of thanks to all committee members who contribute to ICF and equally importantly, take what they learn back to their companies to raise the bar in many areas. Participation on our committees is open to all our members and new members are always welcome. Of course, a word of gratitude to all our members throughout the country for their ongoing support.

I am also deeply appreciative of the many organisations with whom we interact for offering us the opportunity to represent our views to them.

Lastly but by no means least, for their commitment, input and support always, a very special word of thanks to Liam, Trish, Joanne, Aine and Diane in the ICF office.



Rose Fitzgerald Kennedy Bridge. Infrastructure Category Winner, 39th Irish Concrete Society Awards. Major Suppliers - Banagher Precast Concrete, Roadstone.

INDEPENDENT AUDITORS' REPORT TO THE MEMBERS OF IRISH CONCRETE FEDERATION CLG

Opinion

We have audited the financial statements of Irish Concrete Federation CLG which comprise the Statement of comprehensive income, the Statement of financial position, the Statement of cash flows, the Statement of changes in equity for the financial year ended 31 December 2021, and the related notes to the financial statements, including a summary of significant accounting policies.

The financial reporting framework that has been applied in the preparation of the financial statements is Irish law and accounting standards issued by the Financial Reporting Council including FRS 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' (Generally Accepted Accounting Practice in Ireland).

In our opinion, Irish Concrete Federation CLG's financial statements:

- give a true and fair view in accordance with Generally Accepted Accounting Practice in Ireland of the assets, liabilities and financial position of the company as at 31 December 2021 and of its financial performance and cash flows for the financial year then ended; and
- have been properly prepared in accordance with the requirements of the Companies Act 2014.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (Ireland) (ISAs (Ireland)) and applicable law. Our responsibilities under those standards are further described in the 'Responsibilities of the auditor for the audit of the financial statements' section of our report. We are independent of the company in accordance with the ethical requirements that are relevant to our audit of financial statements in Ireland, namely the Irish Auditing and Accounting Supervisory Authority (IAASA) Ethical Standard concerning the integrity, objectivity

and independence of the auditor, and the ethical pronouncements established by Chartered Accountants Ireland, applied as determined to be appropriate in the circumstances for the entity. We have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the directors' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the company's ability to continue as a going concern for a period of at least twelve months from the date when the financial statements are authorised for issue.

Our responsibilities, and the responsibilities of the directors, with respect to going concern are described in the relevant sections of this report.

Other information

Other information comprises information included in the Annual Report, other than the financial statements and our auditor's report thereon, including the Directors' report. The directors are responsible for the other information. Our opinion on the financial statements does not cover the information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit, or otherwise appears to be materially misstated. If we identify such material inconsistencies in the financial statements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Matters on which we are required to report by the Companies Act 2014

- We have obtained all the information and explanations which we consider necessary for the purposes of our audit.
- In our opinion the accounting records of the company were sufficient to permit the financial statements to be readily and properly audited.
- The financial statements are in agreement with the accounting records.
- In our opinion the information given in the Directors' Report is consistent with the financial statements. Based solely on the work undertaken in the course of our audit, in our opinion, the Directors' Report has been prepared in accordance with the requirements of the Companies Act 2014.

Matters on which we are required to report by exception

Based on our knowledge and understanding of the company and its environment obtained in the course of the audit, we have not identified material misstatements in the Directors' Report.

Under the Companies Act 2014, we are required to report to you if, in our opinion, the disclosures of directors' remuneration and transactions specified by sections 305 to 312 of the Act have not been made. We have no exceptions to report arising from this responsibility.

Responsibilities of management and those charged with governance for the financial statements

As explained more fully in the directors' responsibilities statement, management is responsible for the preparation of the financial statements which give a true and fair view in accordance with Generally Accepted

Accounting Practice in Ireland, including FRS102, and for such internal control as they determine necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is responsible for assessing the company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the management either intends to liquidate the company or to cease operations, or has no realistic alternative but to do so.

Those charged with governance are responsible for overseeing the company's financial reporting process.

Responsibilities of the auditor for the audit of the financial statements

The auditor's objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (Ireland) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

As part of an audit in accordance with ISAs (Ireland), the auditor will exercise professional judgment and maintain professional scepticism throughout the audit. They will also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion of the effectiveness of the company's internal control.

INDEPENDENT AUDITORS' REPORT TO THE MEMBERS OF IRISH CONCRETE FEDERATION CLG (CONT'D)

Responsibilities of the auditor for the audit of the financial statements (continued)

- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the company's ability to continue as a going concern. If they conclude that a material uncertainty exists, they are required to draw attention in the auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify their opinion. Their conclusions are based on the audit evidence obtained up to the date of the auditor's report. However, future events or conditions may cause the company to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves a true and fair view.

The auditor shall communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that may be identified during the audit.

The purpose of our audit work and to whom we owe our responsibilities

This report is made solely to the company's members, as a body, in accordance with section 391 of the Companies Act 2014. Our audit work has been undertaken so that we might state to the company's members those matters we are required to state to them in an auditor's report and for no other purpose.

To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the company and the company's members as a body, for our audit work, for this report, or for the opinions we have formed.

Colin Feely FCA
for and on behalf of

Grant Thornton

Chartered Accountants & Statutory Audit Firm
13 - 18 City Quay Dublin

Statement of Comprehensive Income

For the financial year ended 31 December 2021

	2021 €	2020 €
Turnover	1,405,977	1,143,927
Gross profit	1,405,977	1,143,927
Administrative expenses	(820,713)	(757,619)
Operating profit	585,264	386,308
Interest receivable and similar income	34	3
Interest payable and expenses	(5,095)	(630)
Profit before tax	580,203	385,681
Tax on loss	(1,321)	(1,313)
Profit for the financial year	578,882	384,368

Statement of Financial Position

For the financial year ended 31 December 2021

	2021 €	2020 €
Fixed assets		
Tangible fixed assets	694	925
	694	925
Current assets		
Debtors: amounts falling due within one year	1,089,446	655,688
Cash at bank and in hand	2,424,600	2,296,542
	3,514,046	2,952,230
Current liabilities		
Creditors: amounts falling due within one year	(114,429)	(131,726)
Net current assets	3,399,617	2,820,504
Total assets less current liabilities	3,400,311	2,821,429
Net assets	3,400,311	2,821,429
Capital and reserves		
Other reserves	99,420	99,420
Profit and loss account	3,300,891	2,722,009
Shareholders' funds	3,400,311	2,821,429

ICF COUNCIL MEMBERS 2021

MS CAROLINE QUINN (PRESIDENT)

Concast Precast, Newcastle, Co Dublin

MR LARRY BYRNE

Roadstone, Fortunestown, Tallaght, Dublin 24

MR JOHN FARRAGHER

CMC Quarries, Ballygaddy Road, Tuam, Co Galway

MR PETER GLEESON

Gleeson Quarries, Laffansbridge, Thurles, Co Tipperary

MR FRANK HEALY

Ducon Concrete, Ballymaquirke, Kanturk, Co Cork

MR CHRISTY LOUGHNANE

Loughnane Concrete (Birr), Woodlands, Birr, Co Offaly

MR DERRY MCKEOWN

Kilsaran International, Flathouse Lane, Piercetown, Dunboyne, Co Meath

MR FINBARR O'NEILL

Finbarr O'Neill, Poulavone, Ballincollig, Co Cork

MR DAVID WRIGHT

Wright Quarry Products, Swanns Cross, Monaghan

CHIEF EXECUTIVE**MR GERRY FARRELL**

Irish Concrete Federation, 8 Newlands Business Park, Naas Road, Clondalkin, D22, D22 R2F8

COMPANY SECRETARY**MS PATRICIA CRAIG**

Irish Concrete Federation, 8 Newlands Business Park, Naas Road, Clondalkin, D22 D22 R2F8



ICF COUNCIL MEMBERS 2021





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