



ANNUAL REPORT 2023

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. IPKA 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



CONTENTS

- 02. ICF Member Locations 2023
- 03. Forward by the President, Christy Loughnane
- 06. Chief Executive's Report
- 08. ICF Council
- 09. Health & Safety Committee
- 10. Transport Committee
- 10. Planning & Environment Committee
- 11. Technical Committee
- 12. Human Resources
- 13. Irish Precast Concrete Association
- 15. Ground Limestone Producers Association of Ireland
- 16. Europe
- 16. Stakeholder Relations
- 17. ICF Communications
- 18. Social
- 18. Conclusion
- 20. ICF Financial Statement Year Ended 31 December 2023
- 24. ICF Council Members 2023

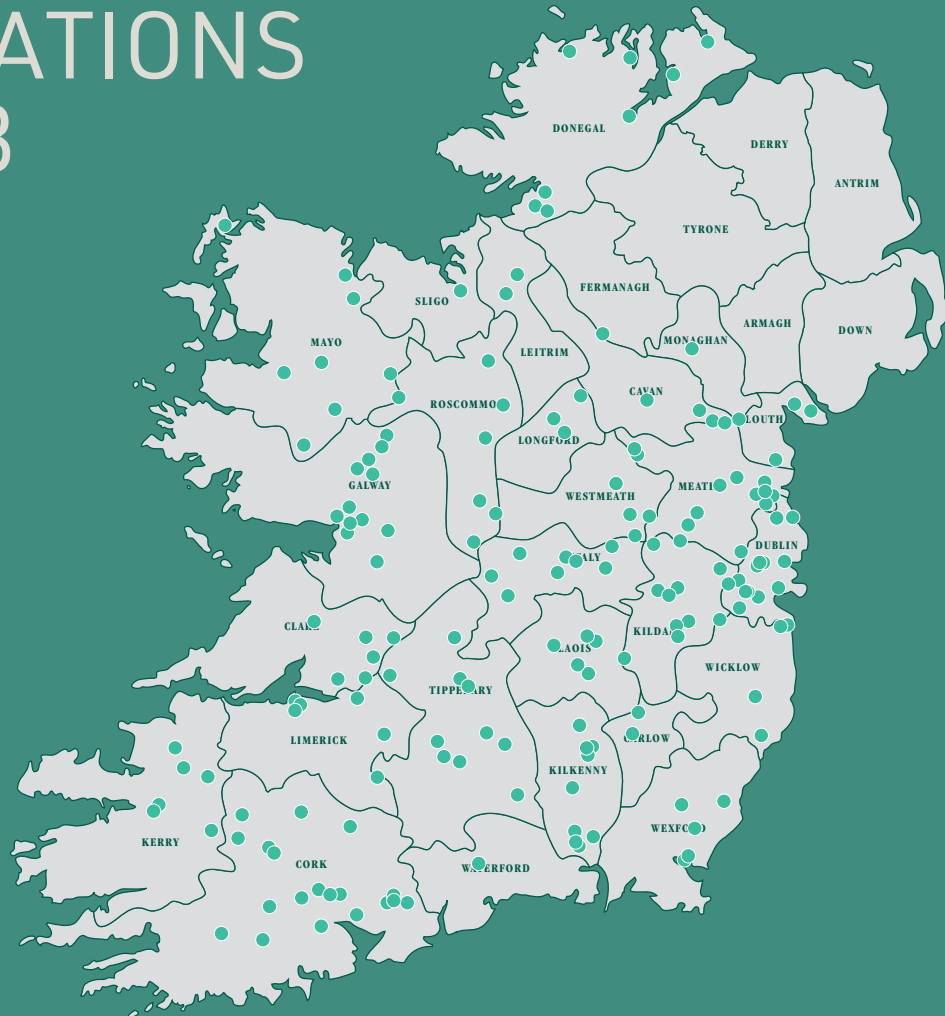
Irish Concrete Federation, 8 Newlands Business Park,
Naas Road, Clondalkin, Dublin 22, D22 R2F8
Phone: +353 (1) 464 0082 | **E-mail:** info@irishconcrete.ie |
Visit: www.irishconcrete.ie

Cover Photo: S02C Arch Bridge - N22 Baile Bhuirne to
Macroom Bypass - Overall Winner of 41st Irish Concrete
Society Awards

Major Suppliers: Banagher Precast, Roadstone



ICF MEMBER LOCATIONS 2023



INDUSTRY FACTS (ESTIMATED)



Industry output of readymix concrete was approximately 4.5 million m³ in 2023



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



Industry output of concrete blocks in 2023 was approximately 125 million units



Agricultural lime output in Ireland was approximately 1.4 million tonnes in 2023



The value of precast concrete output was approximately €400 million in 2023

FOREWORD BY THE PRESIDENT, CHRISTY LOUGHNANE



It gives me great pleasure to introduce you to the annual report of the Irish Concrete Federation (ICF) and to highlight some of the main activities of the organisation over the past year.

Globally the year 2023 will be remembered for continued war in Eastern Europe, the outbreak of war in the Middle East as well as extreme weather events associated with climate change in various regions throughout the world. While global in nature, these events impact on all of us, not least on Ireland's enterprise sector, with continued increases in input costs and dampened demand in some sectors of the economy. Notwithstanding these challenges, output from the aggregates and concrete manufacturing sector over the past year was largely similar to 2022 for the majority of ICF members. Hopefully 2024 will be positive given the current optimistic forecasts for economic growth and construction activity.

Recent economic forecasts have estimated that the population of the Republic of Ireland will be almost six million by 2040. This increasing population will give rise to new societal demands for investment in public infrastructure, particularly housing. It is accepted that despite a significant increase in new house construction to 33,000 units last year, the current level of new housing output is a major constraint on Ireland's economy and society, with demand for housing running at twice the level of new home construction. This reality represents both a challenge and an opportunity for the entire Irish construction sector, including our members who produce the construction materials necessary for housing development. ICF members will provide the

essential building materials for the delivery of Ireland's public infrastructure, which should underpin demand for aggregate and concrete products. However, there is little doubt that the entire construction sector faces an immense challenge to attract people with the required talent, skills and experience to grow the industry's capacity sufficiently to meet the country's needs.

The imposition by Government of a levy on readymix concrete and concrete blocks in 'Budget 2023' was received with shock and disappointment throughout our membership. Thanks to the efforts of ICF members and the support of many stakeholder organisations, the impact of the levy has been negated to some extent, with the subsequent exclusion of precast concrete from its scope and its reduction to 5% of product value. The administration of the levy has involved much consultation with the Department of Finance and the Revenue Commissioners over the past year. ICF will continue to represent the industry to seek the most efficient means of administering the levy, which regrettably is likely to remain a feature of the industry in the years to come.

It is generally accepted that the planning system in Ireland is no longer fit for purpose and it is estimated that there is up to two years' supply of housing held up in the planning system at a time when the need for new housing is at unprecedented levels. Notwithstanding the obvious focus on housing, our own industry has not been immune from the massive delays in the planning system. The ICF Planning and Environment Committee is undertaking a detailed analysis of quarry planning applications during the 2017 to 2023 period, which will

FOREWORD BY THE PRESIDENT, CHRISTY LOUGHNANE

show that quarry planning applications are now taking almost three years to get through the State's planning system, even for extensions of existing quarrying operations. ICF will publish its findings in a report to highlight the damage that such delays are causing to the delivery of Ireland's national infrastructure. This report will be a follow up to "*Essential Aggregates - Providing for Ireland's Needs to 2040*" which we published in 2019.

Similar to other sectors, there is ever-increasing attention focused on our industry's response to the challenges posed by climate change. In this respect, there is no doubt that all stakeholders will closely monitor developments in the cement and concrete sector as it continues on its journey of decarbonisation, increased circularity and reduced impact on nature and the environment. The ICF Council took a decision to fully resource the organisation's activity in this area and in January 2024, Conor Hayes is joining us as our new Head of Sustainability. Conor comes to ICF with a wealth of experience gained in Arup and with a keen sense of enthusiasm to highlight the positive contribution our sector can make to society in the years to come, while also responding to societal demand for the sustainable use of materials.

During the year, the ICF Health and Safety Committee partnered with the Health and Safety Authority (HSA) on two quarry safety campaigns during the year which focused on maintenance and guarding, while our Technical Committee members continued to contribute to the ongoing review of standards and associated guidance within the National Standards Authority of Ireland. Our Transport Committee engaged with the Road Safety Authority on the implementation of the derogation from the requirements of 'Regulation 561/ 2006 - European Communities (Road Transport) Regulations' for ready mixed concrete deliveries. The ICF's HR Forum continued to gain momentum during the year and is now an established grouping of HR practitioners among our membership which will keep the industry up to date on the ever changing employment law landscape in Ireland.

Members of the Irish Precast Concrete Association were highly involved in the lobbying activities on the Defective Concrete Products Levy (DCPL) and

the association held a workshop in June on Modern Methods of Construction which featured presentations from Enterprise Ireland, Construct Innovate and Build Digital.

The introduction of a subsidy for the spreading of agricultural lime to promote the achievement of optimum soil pH on Irish farms was a welcome announcement by the Minister for Agriculture and Food. However, it is somewhat ironic that the introduction of the subsidy coincided with a 30% reduction in lime sales due to poor land conditions, arising from high levels of rainfall over the past year. Nonetheless, members of the Ground Limestone Producers Association of Ireland are confident that the coming years will see increased usage of lime as a carbon neutral fertiliser, which will play a major role in reducing emissions from the agriculture sector.

In conclusion, I would like to thank the members for their support for ICF during 2023 and to thank my fellow Council members for their guidance and expertise which is always generously given.

While stewardship of the federation is the responsibility of the Council, the 'work engine' of the organisation is the policy committees which operate across a broad range of disciplines and business areas. I would like to express my sincere thanks to all who contributed to our committees during the year.

Finally, a sincere word of thanks to the staff of the ICF for their commitment and professionalism over the past twelve months, which is greatly appreciated by all our members.



Christy Loughnane
President



INTERNATIONAL RUGBY EXPERIENCE
WINNER BUILDING CATEGORY
41ST IRISH CONCRETE SOCIETY AWARDS
MAJOR SUPPLIERS: O'CONNELL QUARRIES, TECHRETE

CHIEF EXECUTIVE'S REPORT, GERRY FARRELL



It gives me great pleasure to present the Annual Report of the Irish Concrete Federation for 2023, a year that will probably be primarily remembered for continued war in Eastern Europe, uncertainty in the Middle East and an increase in extreme weather events due to climate change.

Despite a Ukrainian counteroffensive during the year, the battlelines of Eastern Europe in the Russian and Ukrainian conflict barely moved, with the war seemingly at a stalemate and little signs of any meaningful breakthrough that would bring the war closer to resolution. After years of relative calm in the Middle East, the world was shocked by the events of October 7th, when Hamas attacked Israel and approximately 1,200 Israelis were killed and 240 people were taken hostage. In retaliation, Israel launched airstrikes against Gaza, resulting in a horrific death toll for Palestinian civilians, many of whom were women and children. By year end there was no sign that diplomacy would succeed in bringing conflict to an end, with the likelihood of further warfare in the New Year.

With global temperatures shattering records, climate change is no longer a future threat. It is the world's new reality. The past year saw extreme weather events around the globe, ranging from historic wildfires to extreme drought and record flooding. However, investments in clean energy have soared and the production of wind and solar power continues to increase while hydrogen is being touted as a source of clean energy. Unsurprisingly, challenges remain about how fast and how widely such technologies can be scaled up, to counteract increased fossil fuel production and emissions.

As is always the case with an open economy such as Ireland's, global events continue to impact close to home. While undoubtedly continuing to impact on the UK economy, the challenges presented by Brexit have been largely overcome by businesses trading with our nearest market. In February, the UK and the EU signed the 'Windsor Framework' which will govern post-Brexit trading arrangements between Northern Ireland and Great Britain, finally burying the Northern Ireland protocol.

Ireland experienced its own impacts of climate change during the year, none more evident than during the summer when following a sizzling June, the month of July was the wettest on record. The impact of weather on the fortunes of ICF members was significant as it inevitably influences construction and agricultural activity significantly.

In 2022, Russia's invasion of Ukraine impacted significantly upon the cost and availability of construction materials as well as contributing to soaring electricity prices, particularly in September. Thankfully the overall rate of inflation in construction materials abated somewhat in 2023 to approximately 6% based on CSO wholesale price indices. However, it is particularly noticeable that cost inflation in the cement and concrete sectors was significant during the year.

Increases in the cost of building over the past two years continue to present a challenge to meeting Ireland's housing targets. Notwithstanding these challenges, there was a significant increase in new housing commencements and completions during

the year. Completions of new housing units reached 33,000 in 2023. Particularly noticeable was a 28% increase in apartment completions, particularly in Dublin. A positive indicator for 2024 is a significant rise in housing commencements, also to 33,000 units, the highest since 2007. It is worth noting that 60% of these commencements were in the greater Dublin area.

Based on Central Statistics Office data on planning permissions, capital investment on Irish farms remained largely unchanged from previous years. However, there is concern that depressed product prices as well as continued high input prices, combined with bad weather in the second-half of the year may impact on these investment plans.

In summary, notwithstanding the challenges presented by global events, the economic outlook in Ireland remains favourable in the short to medium term. The health of the public finances, allied with 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.

Over the past year ICF has continued to work on behalf of our member businesses throughout the country across a range of policy areas, some of which I will address in this report. Without doubt, the imposition by Government of the Defective Concrete Products Levy (DCPL) with effect from September 1st of this year was unquestionably the principal item on the agenda for the organisation during the year. As I mentioned in my contribution to last year's annual report, the announcement of the levy by government in 'Budget 2023' was met with shock throughout the entire construction industry, particularly given the intense pressure on construction costs being experienced in the construction supply chain. In May of this year, KPMG Future Analytics produced a report for ICF outlining that the levy would increase the cost of building a house by approximately €1,300, with the cost of a wind turbine base increasing by over €5,000. Thankfully, due to the intense lobbying efforts of ICF in co-operation with other partner representative bodies in late 2022, the magnitude of the levy was reduced and its implementation date delayed. However, as 2023 progressed it became clear that significant difficulties in the administration of the levy were emerging. Following an extremely proactive campaign by ICF and its precast concrete members, the complete exemption of precast concrete products from the levy was secured and was implemented through a change

in the legislation facilitated in Finance Act 2023. While our considerable efforts to have the levy on ready mixed concrete and concrete blocks postponed were ultimately in vain, significant progress was made in discussions with the Department of Finance and the Revenue Commissioners on the administration of the levy. ICF made detailed submissions on the levy's administration, with significant assistance from Grant Thornton, which ultimately facilitated the development of guidance for our members to assist compliance with the DCPL.

I would like to express my gratitude to the Department of Finance and the Revenue Commissioners for positively engaging with us in the lead up to the introduction of the levy in September. In addition, I would like to thank partner organisations, including the Construction Industry Federation, the Irish Farmers Association and Ibec for supporting our efforts. There are undoubtedly some outstanding issues which will require further clarification on the levy's implementation. However, we look forward to continuing to work with the Department of Finance and the Revenue Commissioners to address any issues of concern to our membership and to ensure compliance with the levy to the best of our abilities.

As ever, the 'work engine' of the organisation is 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.

The following is a short report on some of the activities of our Council and committees during the past year. 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 2023 were:

Mr Christy Loughnane (President)
Loughnane Concrete (Birr)

Ms Caroline Quinn
Concast Precast Group

Mr John Farragher
Concrete Manufacturing Company (CMC)

Mr Peter Gleeson
Gleeson Quarries

Mr Frank Healy
Ducon Concrete

Mr Mark Galvin
Ardfert Quarry Group

Mr Derry McKeown
Kilsaran International

Mr John O'Connor
Flood Group

Mr Donal Rigney
Roadstone

The ICF Council is responsible for the overall governance and management of the federation and meets regularly to discuss priority areas to be addressed by ICF on behalf of its members. As referred to earlier in this report, the introduction by Government of the Defective Concrete Products Levy was the issue which consumed much of the Council's time during the past year. The ICF Council coordinated an intensive lobbying effort on behalf of the industry to seek the deferment of the levy, pending a rigorous regulatory and economic impact analysis. This lobbying effort, which involved the entirety of ICF's membership, resulted in the Government's decision to exclude precast concrete products from the scope of the levy and reduce its level to 5%. The Council will continue to guide ICF in its future discussions with Government on this issue.

In 2022, the ICF Council oversaw the development of a sustainability plan for the federation by RPS Consulting. The priority recommendation of the plan was the resourcing of a sustainability function within the ICF to engage proactively with all stakeholders in order to effectively communicate the achievements of our

sector to date in reducing our industry's environmental impacts and to guide our membership on reducing their carbon footprint, enhancing biodiversity and supporting the circular economy. I am happy to report that Conor Hayes will be joining the federation as our new Head of Sustainability in January 2024. Conor joins the ICF team from Arup where he was an Associate and Chartered Structural Engineer and was Arup's Global Structural Sustainability Skills Manager, responsible for empowering the 2,000 structural engineers of the firm to make sustainability a normal part of the work they do. He was also the European representative on Arup's Global Net Zero Carbon Buildings steering group and led the embodied carbon and data analytics workstreams for Arup's mass carbon data collection campaign. I know that Conor will be a fantastic addition to the ICF team as well as a valuable source of knowledge and advice for our members as they progress on their sustainability journey.

The Council is monitoring the production of a data-based report on the critical need for aggregates for the delivery of Ireland's public infrastructure, focusing on the depletion of authorised reserves of aggregates in Ireland and the efficiency of the planning system in facilitating access to authorised reserves. The scope of the data source underpinning the report was expanded to include the current year and we look forward to publishing the report in 2024 to follow up on our 2019 publication – "Essential Aggregates - Providing for Ireland's Future to 2040".

During the year the ICF Council also monitored the development by the Department of Enterprise, Trade and Employment of procurement criteria for embodied carbon in cement and concrete procured by public bodies.

The council also oversees the federation's Annual General Meeting which this year included presentations from the Economic and Social Research Institute, RPS Consulting, Sustainable Energy Authority of Ireland, Cement Manufacturers Ireland and Stratis Consulting.

Responsibility for the organisation's finances, which remain on a solid footing, lies with the Council with the valued assistance of our Financial Controller and Company Secretary Trish Craig. In this respect, I would like to thank all our members and the members of Cement Manufacturers Ireland for their support to ICF during the year.



HEALTH AND SAFETY

The members of the Health and Safety Committee in 2023 were as follows:

Mr Paul Gallagher
Ducon Concrete (Chairperson)

Ms Mary O'Brien
McGraths, Cong

Mr Vincent Flanagan
B D Flood

Mr Noel Morgan
Flood Flooring

Mr Ronan Quinn
Roadstone

Mr John McWeeney
CRH

Mr Ian Hall
Wright Quarry Products

Ms Martina Freyne
Harrington Concrete & Quarries

Mr Mark Patterson
Kilsaran Precast

Mr Paul Maher
Kilsaran International

Mr Brendan Donagher
Concast Precast

Mr Mark O'Dea
Techrete

Mr David Whyte
Shay Murtagh Precast

Mr Denis Byrne
Kemek

Mr Gerry Reidy
Irish Cement

Mr Ronan Walsh
Banagher Precast

Mr Cillian Casey
Keohane Readymix

Mr Anthony Wagstaffe
Kellys of Fantane

Mr Clive Kelly
Consultant

Mr Kieran Thompson
Breedon Ireland

Mr Paul Clarke
O'Reilly Concrete

In 2023, the ICF Health and Safety Committee and the Health and Safety Authority (HSA) collaborated for two quarry safety campaigns, involving inspections of quarries by HSA Inspectors and safety initiatives by our members. The Spring Quarry Safety Campaign took place in March and focused on machinery operation, isolation, maintenance and guarding. A second campaign on the same theme took place in September. Over the two campaigns a total of 300 inspections were carried out throughout the country which represents a very significant and welcome focus by the authority on safety in quarry workplaces. The ICF and HSA held a pre-campaign briefing for the industry in advance of both campaigns which received great support from our members. In addition, we were grateful for the extremely valuable feedback on both campaigns which was presented to our Health and Safety committee by the HSA during the year.

As ever, 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. 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. We understand that the HSA intends to focus on the management of contractors in the first of its campaigns in 2024 and we look forward to supporting them in their efforts.

During the year ICF continued to participate on the Plant Working Group within Solas which is contributing to the reform of the Quarry Safety Certification Scheme and also monitored progress of the implementation of the Dangerous Substances (Flammable Liquids and Fuel Distribution and Commercial Supply Stores) Regulations 2019.

The committee is also monitoring progress of the Construction Safety Licensing Bill which is passing through the Oireachtas currently. While ICF welcomes the general thrust of the legislation, there are some provisions which need amending to reflect the quarry working environment.

TRANSPORT COMMITTEE

The members of the Transport Committee in 2023 were 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 Neil McConomy
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, Cong

The ICF Transport Committee welcomed the implementation in Ireland of the derogation from the requirements of Articles 5-9 of 'Regulation 561/ 2006 - European Communities (Road Transport) Regulations' for ready mixed concrete deliveries by Government in November. ICF was highly instrumental in the granting of this derogation by the EU Commission and greatly appreciated the support of the Department of Transport in the intensive lobbying process, both at EU and national level.

In November, ICF met with the Road Safety Authority (RSA) on the practical implementation of the derogation. Arising from this engagement, ICF welcomed the publishing of guidance to operators by the RSA which provided clarity and consistency of interpretation of the new arrangements for deliveries of ready mixed concrete.

The Transport Committee also monitored implementation by local authorities of the 'Dangerous Substances (Flammable Liquids and Fuels Distribution and Commercial Supply Stores) Regulations, 2019'.

PLANNING & ENVIRONMENT COMMITTEE

The members of the Planning and Environment in 2023 were as follows:

Mr Fergus Gallagher
Kilsaran International (Chairman)

Mr Stephen Linden
Mannok

Mr Billy McGrath
McGraths, 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 Conor Quirke
M F Quirke & Sons

Ms Sarah O'Connell
O'Connell Concrete

Mr Brian Downes
Breedon Ireland

Mr John Fennell
Breedon Ireland

The Planning and Environment Committee welcomed the publishing of draft national end-of-waste criteria for recycled aggregates recovered from waste concrete by the Environmental Protection Agency (EPA), in partnership with the local authority sector in late 2022. In February of this year, ICF made a submission on the draft criteria and while our members were disappointed at the limitations imposed on the uses of recycled aggregates in concrete, these criteria are hopefully just the first step of a process which will ultimately contribute to greater circularity in the overall construction sector. ICF will continue to work with the EPA and other stakeholders to achieve this objective.

The Planning & Environment Committee met with the Department of Housing, Planning & Local Government on the introduction of the 'Water Environment (Abstractions and Associated Impoundments) Act 2022' which was passed by the Oireachtas last year and will introduce a registration system for abstractions and a licencing regime for abstractions over a certain threshold. In November, ICF met with the EPA to discuss the implementation of the licencing regime which will be eventually administered by the agency. ICF will continue to engage with the EPA and the Department on this issue in 2024.

A sub-committee of the Planning and Environment Committee continued to work with RPS Consulting on the completion of an evidence-based report on the depletion of authorised reserves of aggregates in Ireland. The scope of the report was extended to include an analysis of all quarry planning decisions from 2017 to 2023. The report will focus on the importance of aggregates to Irish society, the reducing reserve of authorised aggregate reserves in Ireland and the efficiency of the planning system for aggregate

extraction. We look forward to publishing the document in the coming year.

The committee is also closely monitoring progress of the government's new Planning and Development Bill, which will hopefully underpin the development of a planning system that provides the social, economic and physical infrastructure necessary to meet the needs of our people in a way that protects the many qualities of our natural and built environment.

In November, ICF met with the National Monuments Service of the Department of Housing, Local Government and Heritage to discuss the 'Historic and Archaeological Heritage Act 2023' which will see greater protection for archaeological heritage and the development of a new Register of Monuments. I would like to thank the National Monuments Service for their ongoing engagement on the application of the Archaeological Code of Practice between ICF and government. I would also like to thank the ICF Project Archaeologist Dr Charles Mount for his ongoing guidance to the committee and his engagement with the National Monuments Service on our behalf.

TECHNICAL COMMITTEE

The members of the Technical Committee in 2023 were as follows:

Mr Alan Lowe
Roadstone (Chairman)

Mr Peter Deegan
Banagher Precast

Mr Brendan Lynch
Consultant

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 Eanna Nolan
Irish Concrete Society

Mr Fintan Keane
Harrington Concrete

Mr Sean Cassidy
Breedon Ireland

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 and the Concrete Standards Consultative Committee.

Our Technical Committee continues to contribute to the ongoing revision of product standards within the National Standards Authority of Ireland and the development of new guidance on their application in industry. ICF committee members contributed to the ongoing review of 'SR325 – Design of Masonry Standards in Ireland to Eurocode 6' and ICF carried out a survey of members for Geological Survey Ireland in order to contribute to the review of 'SR 16 – Guidance on Aggregates for Concrete' which continued during the year. The committee oversaw the completion of the first stage of a project on the development of a standardised test methodology for concrete block durability, which is being carried out in association with Technological University Dublin (TUD). I would like to thank Dr Niall Holmes of TUD for his work on this project to date and we look forward to communicating the benefits of this valuable research project to our members throughout 2024.

Throughout the year the ICF engaged regularly with the Department of Housing, the National Standards Authority of Ireland, the National Building Control and Market Surveillance Office (NBCO) and Geological Survey Ireland on technical matters. ICF also commenced the development of a comprehensive online modular training course for employees in our industry on the manufacture of concrete masonry blocks and compliance with the Construction Products Regulation.

Members of the committee who participate on CEN panels contributed to the ongoing consultation on 'EN 17555- Aggregates for Construction Uses' and monitored the ongoing review of the Construction Products Regulation (CPR) and EN206.

HUMAN RESOURCES FORUM

The members of the ICF Human Resources Forum are as follows:

Ms Aine Black
Shay Murtagh Precast

Ms Caroline McCaffrey
Mannok

Ms Caroline Quinn
Concast Precast Group

Ms Enda Keenan
Kilsaran International

Ms Veronica Gill
Kilsaran Precast

Ms Jennifer Flynn
O'Reilly Concrete

Mr Shane Casey
Roadstone

Ms Linda McGrath
McGraths, Cong

Mr Noel Morgan
Flood Precast

Ms Orla Dunne
Techrete

Ms Rowena Bottrill
Breedon Group

Ms Stephanie Mahady
Harrington Concrete & Quarries

Ms Susanne Atkinson
Wright Quarry Products

Mr Thomas King
Wright Quarry Products

The ICF Human Resources (HR) Forum comprises mainly of HR practitioners in our industry and is supported by Stratis Consulting and facilitates the updating of members on recent and pending changes in employment law. The forum is continuously monitoring the ever-increasing raft of employment legislation facing employers and briefing members on the implications for their businesses. During the year, the forum discussed issues such as statutory sick pay, the Work Life Balance Bill, Protected Disclosures Act 2023 and the introduction of the autoenrollment retirement savings system. The forum also oversaw the federation's annual industry salary and benefits survey and looks forward to holding regional HR briefings for all members in the first quarter of next year.

IRISH PRECAST CONCRETE ASSOCIATION

The members of the IPCA Council in 2023 were as follows:

Mr Derek Duffy
Kilsaran Precast (Chairman)

Mr Frank Healy
Ducon Concrete

Ms Caroline Quinn
Concast Precast Group

Mr Stephen Wright
Wright Quarry Products

Mr Emmet Cosgrove
O'Reilly Bros

Mr Brendan Mahon
Banagher Precast

Mr Marcus Sweeney
Techrete

Mr Alan Brennan
Killeshal Precast

Mr John O'Connor
Flood Precast

Mr Thomas Coyle
Mannok

Mr Denis Doyle
Doyle Concrete

Mr John Cleary
Moylough Concrete Products

The Irish Precast Concrete Association (IPCA) is a constituent association of the Irish Concrete Federation. Its membership includes the majority of the key manufacturers of precast products for the construction industry in Ireland and the UK.

Undoubtedly the key issue for IPCA throughout 2023 was a continuation of the sector's efforts to have precast concrete products excluded from the scope of the Defective Concrete Products Levy (DCPL). Thanks to the IPCA members direct lobbying of their public representatives in late 2022, political agreement was achieved to exclude precast concrete products from the scope of the DCPL to protect jobs and the competitive position of Irish precast concrete exports on the UK marketplace. However, as the past year progressed it became clear that official interpretation of the legislation differed from the political decision of 2022. Hence IPCA sought a change in the legislation to confirm the total exclusion of precast concrete from the levy's scope, which yielded ultimate success in the form of an amendment to the legislation in the Finance Act 2023. This followed positive engagement with the Department of Finance and the Revenue Commissioners throughout the year.

The growing importance of Modern Methods of Construction will undoubtedly lead to greater use of offsite manufacturing in the future, which will in turn generate opportunities for precast concrete manufacturers. In June, the Irish Precast Concrete Association hosted a workshop on Modern Methods of Construction and welcomed guest speakers from Construct Innovate, Enterprise Ireland and Build Digital. The workshop also featured a presentation by PJ Rudden, Chair of Innovation and Digital Adoption Sub-Committee of the Construction Sector Group (CSG) and member of Government's Project Ireland 2040 Delivery Board and Conall Boland of RPS Consulting who made a presentation on the development of green procurement guidelines for cement and concrete being developed by the Department of Enterprise, Trade and Employment.



SAND MARTINS WALL
WINNER ELEMENT CATEGORY
41ST IRISH CONCRETE SOCIETY AWARDS
MAJOR SUPPLIER: BANAGHER PRECAST CONCRETE

GROUND LIMESTONE PRODUCERS ASSOCIATION OF IRELAND

The members of the GLPAI committee in 2023 were as follows:

Mr Eoin O'Carroll
Bennettsbridge Limestone (Chairman)

Mr Joe McGrath
McGrath Limestone Quarries

Mr Francis Harrington
Harrington Concrete & Quarries

Mr Seamus McAteer
Kilsaran International

Mr Fraser Thom
Breedon Ireland

Mr Enda Hanly
Hanly Quarries

Mr Denis Griffin
Ardfert Quarry Products

Mr Kevin Morrissey
Dan Morrissey & Co

Mr Diarmuid O'Sullivan
Roadstone

Mr Billy McGrath
McGraths, 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.

2023 proved to be a particularly busy year for the association, due primarily to the introduction of a government subsidy for the spreading of lime and the introduction of the new National Fertilizer Database.

Under the 'National Liming Programme 2023', a subsidy of €16 / tonne was introduced for the spreading of lime by farmers nationally. The GLPAI greatly welcomed this innovative approach to promoting the benefits of lime from a soil fertility perspective, as well as taking a positive step to reducing Ireland's agricultural greenhouse gas emissions. It is therefore regrettable that, arising from complications in the administration of the programme in combination with extremely poor weather, sales of lime fell by almost 30% during the year. GLPAI was highly involved in facilitating an extension of the spreading deadline under the programme into 2024. However, it was disappointing that the programme was not renewed for the current year. The National Liming Programme 2023 was massively oversubscribed, thereby indicating a willingness by farmers to improve their soil fertility. It is imperative that we harness this enthusiasm in the years to come as Irish farmers seek to reduce the use of chemical fertilizers.

The GLPAI met with the Department of Agriculture, Food and the Marine on a number of occasions during the year on the introduction of the new National Fertilizer Database, introduced under the 'Veterinary Medicinal Products, Medicated Feed and Fertilisers Regulations Act 2023'. GLPAI will continue to assist its members engage with the database which will see all sales and purchases of fertilisers, including lime, being reported directly to the Department of Agriculture.

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 Greenacre Marketing. A comprehensive promotional advertising campaign in the traditional farming press, digital advertising and social media promotion was undertaken during the spring and autumn. We look forward to continuing our promotional campaign in the coming year.

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 represented on the Board of ERMCO and UEPG by Gerry Farrell. In addition, Mr Jim O'Brien is an honorary President of UEPG and regularly contributes to the organisation on ICF's behalf. ICF is supportive of the work programme of these organisations, particularly in the areas of the environment, technical standards and health and safety.

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.



*ICF AGM and Management Seminar 28th of November 2023
Gerry Farrell*



*ICF AGM and Management Seminar 28th of November 2023
Conor O'Toole ESRI*

Some of the organisations which ICF engaged with throughout 2023 are included on the following list and I apologise for any inadvertent omission from the list.

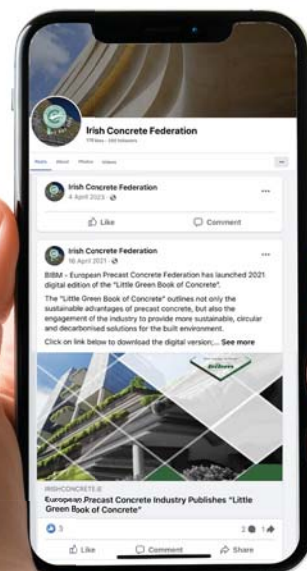
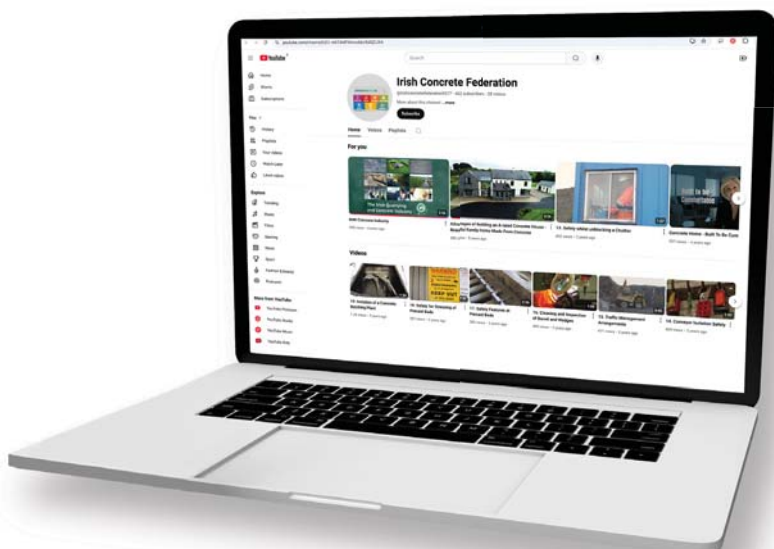
- Alliance for Insurance Reform
- Build Digital
- Local Authorities
- An Bord Pleanála
- An Garda Síochána
- An Taisce
- Association of Consulting Engineers of Ireland
- Cement Manufacturers Ireland
- Construction Industry Council
- Construction Industry Federation
- Construct Innovate
- Department of 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
- Engineers Ireland

- Enterprise Ireland
- Environmental Protection Agency
- Fertiliser Association of Ireland
- Freight Transport Association of Ireland.
- Geological Survey 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
- National Building Control and Market Surveillance Office
- 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

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. Effective communications with our member organisations allow us to represent the sector effectively and professionally and in an informed manner. This in turn helps the reputation of the organisation with other stakeholder organisations, both in Government and in industry.

Through its extensive committee structure, ICF harnesses the expertise of individuals and organisations in our industry and maintains an ever-present link with its membership. Regular committee meetings are supported by regional meetings held throughout the year which keep members updated and briefed on the organisation's activities. In addition, the Federation's work agenda is communicated increasingly through our newsletters, newsflashes, safety alerts and the organisation's website. The organisation now operates three websites, including Grolime for our members involved in the production of agricultural lime. A special word of thanks to my colleague Gwen Synnott for her work in the many different facets of ICF communications with our members.





**UCL EAST, ONE POOL STREET
HIGHLY COMMENDED INTERNATIONAL AWARD
41ST IRISH CONCRETE SOCIETY AWARDS
MAJOR SUPPLIER: TECHRETE**

SOCIAL

In May, we welcomed members to the highlight of the ICF's social calendar, the annual dinner and social weekend which as usual was organised expertly by Diane O'Donoghue in our head office and was thoroughly enjoyed by all guests.

CONCLUSION

An industry representative body like the ICF is only as strong as the input it receives from its members. I am always aware that many of the individuals who contribute to ICF have busy roles with their employers to whom their first priority must lie. As I referred to in last year's Annual Report, the Irish aggregates and concrete products industry should consider itself lucky to have so many dedicated and professional individuals who make an immense contribution to the industry's representative body for the benefit of all who participate in the sector.

I would therefore like to express my gratitude once again to the Council, committees and members of the Irish Concrete Federation for their ongoing commitment throughout 2023. We look forward to continuing this work in 2024 which promises to be yet another busy and challenging one for ICF.

I would like to thank our President, Christy Loughnane for his leadership of the organisation during the year and I look forward to working with him again throughout the coming year. A special mention also to Derek Duffy, Frank Healy and Eoin O'Carroll for their leadership of the various organisations within the ICF.

Lastly but by no means least, for their commitment, input and support always, a very special word of thanks to my colleagues in Newlands Cross – Diane O'Donoghue, Trish Craig and Gwen Synnott who contribute greatly on a daily basis to this organisation. A word of thanks to Charles Mount for his work as ICF Project Archaeologist and a welcome to Conor Hayes, our new Head of Sustainability who we look forward to welcoming onto the ICF team in the New Year.



SILVERTOWN TUNNEL
WINNER INTERNATIONAL AWARD
41ST IRISH CONCRETE SOCIETY AWARDS
MAJOR SUPPLIER: BANAGHER PRECAST

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 2023, 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 2023 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, including the Ethical Standard for Auditors (Ireland) issued by the Irish Auditing and Accounting Supervisory Authority (IAASA), 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

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

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

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)

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.
- 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 communicates 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 2

Statement of Comprehensive Income

For the financial year ended 31 December 2023

	2023 €	2022 €
Turnover	1,066,214	1,108,600
Gross profit	1,066,214	1,108,600
Administrative expenses	(854,946)	(1,109,688)
Operating profit/(loss)	211,268	(1,088)
Interest receivable and similar income	1,196	-
Interest payable and similar expenses	(1,166)	(10,701)
Profit/(loss) before tax	211,298	(11,789)
Tax on profit/(loss)	(1,568)	(1,313)
Profit/(loss) for the financial year	209,730	(13,102)

Statement of Financial Position

As at 31 December 2023

	2023 €	2022 €
Current assets		
Debtors: amounts falling due within one year	1,084,341	1,127,078
Cash at bank and in hand	2,669,679	2,372,465
	3,754,020	3,499,543
Current liabilities		
Creditors: amounts falling due within one year	(157,081)	(112,334)
Net current assets	3,596,939	3,387,209
Net assets	3,596,939	3,387,209
Capital and reserves		
Other reserves	99,420	99,420
Profit and loss account	3,497,519	3,287,789
Shareholders' funds	3,596,939	3,387,209

ICF COUNCIL MEMBERS 2023

MR CHRISTY LOUGHNANE (PRESIDENT)

Loughnane Concrete (Birr), Woodlands Birr, Co Offaly

MS CAROLINE QUINN

Concast Precast Group, Hazelhatch, Newcastle, Co Dublin

MR JOHN FARRAGHER

Concrete Manufacturing Company, Ballygaddy Road, Tuam, Co Galway

MR MARK GALVIN

Ardfert Quarry Group, Sackville, Ardfert, Co Kerry

MR PETER GLEESON

Gleeson Quarries, Laffansbridge, Thurles, Co Tipperary

MR FRANK HEALY

Ducon Concrete, Ballymaquirke, Kanturk, Co Cork

MR DERRY MCKEOWN

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

MR JOHN O'CONNER

Flood Group, Hilltown, Oldcastle, Co Meath

MR DONAL RIGNEY

Roadstone, Belgard, Tallaght, Dublin 24 PKK2

CHIEF EXECUTIVE**MR GERRY FARRELL**

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

COMPANY SECRETARY**MS PATRICIA CRAIG**

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

ICF COUNCIL MEMBERS 2023

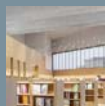


*Back row (L-R) John O'Connor, Peter Gleeson, Frank Healy, John Farragher, Mark Galvin.
Front row (L-R) Caroline Quinn, Donal Rigney, Christy Loughnane, Gerry Farrell, Derry McKeown.*



Irish Concrete Federation
8 Newlands Business Park, Naas Road,
Clondalkin, Dublin 22, D22 R2F8
Tel: 01 464 0082
E-mail: info@irishconcrete.ie

www.irishconcrete.ie



Concrete Built is Better Built