



2024

IRISH CONCRETE FEDERATION

ANNUAL REPORT

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 Aggregates Europe. IPKA is a member of BIBM, the European Federation for Precast Concrete.

ERMCO

EUROPEAN READY MIXED CONCRETE ORGANIZATION LTD

European Ready Mixed Concrete Organization (ERMCO)



European Federation
for Precast Concrete



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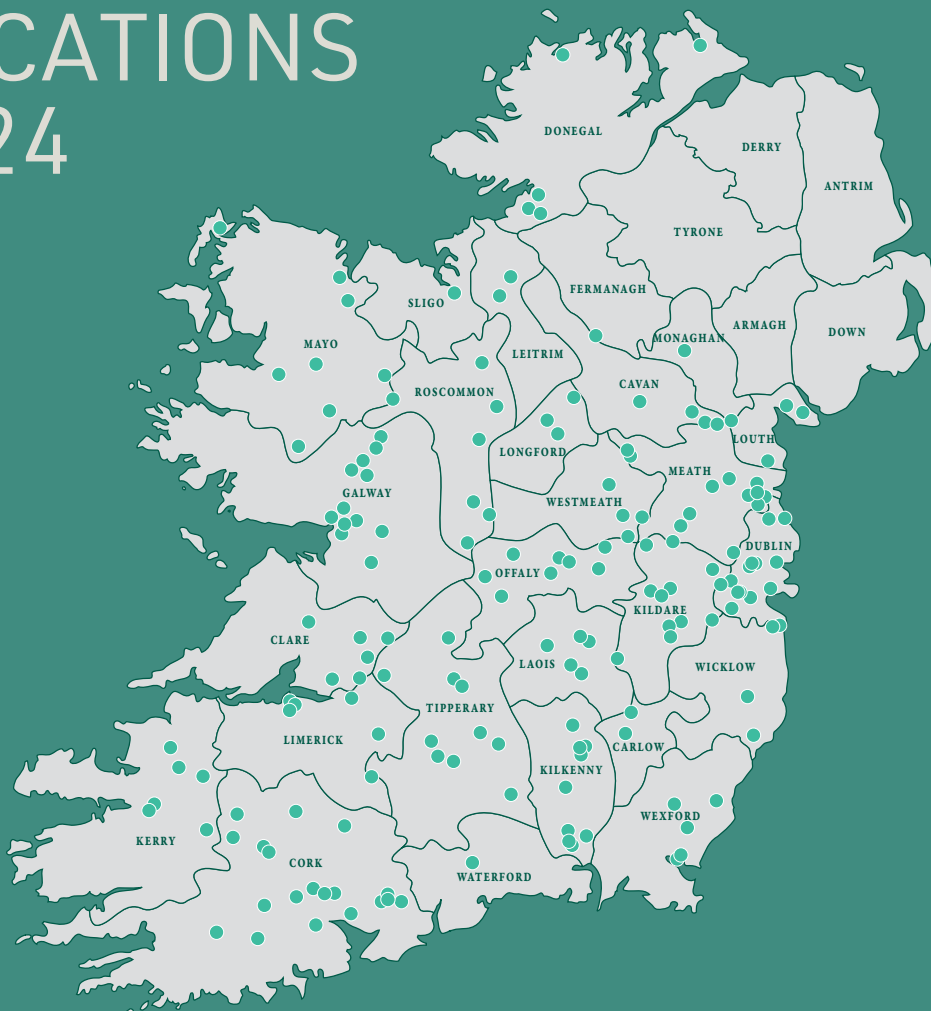
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Cover Photo: Church of Oak Distillery - Overall Winner of
the 42nd Irish Concrete Society Awards

Major Suppliers: Kilsaran Concrete



ICF MEMBER LOCATIONS 2024



INDUSTRY FACTS (ESTIMATED)



Industry output of readymix concrete was approximately 4 million m³ in 2024



There are approximately 200 concrete manufacturing locations and 500 large active quarries in Ireland



Industry output of concrete blocks in 2024 was approximately 120 million units



Agricultural lime output in Ireland was approximately 1 million tonnes in 2024



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

FOREWORD BY THE PRESIDENT DONAL RIGNEY



It gives me great pleasure to introduce you to the annual report of the Irish Concrete Federation (ICF) which I hope will provide readers with an insight into our industry and some of ICF's activities undertaken on our members behalf. Our Chief Executive Gerry Farrell will update readers in detail on these activities later in this report. From my own perspective I would like to take this opportunity to highlight some important issues facing our industry and our organisation at the current time.

I was honoured to take over the role of ICF President from Christy Loughnane of Loughnane Concrete at our Annual General Meeting last November. The ICF has always benefited from the leadership of industry stalwarts like Christy in times past. With ICF members facing challenges running their own businesses on a daily basis, it is essential that ICF continues to use its influence to foster a positive environment for our industry to flourish, thereby making its maximum contribution to Irish society by providing the materials essential to our country's future development. This will only be possible with the proactive support and involvement of member companies in the activities and work programme of ICF.

Arising from 'Election 2024' we have a new government that will undoubtedly face the same challenges as those of its predecessor. There is no doubt that housing continues to be the pre-eminent issue of our times in this country with significant challenges ahead for Government, particularly in terms of achieving increased housing delivery to meet societal needs. While the construction industry will be required to

deliver the homes and other public infrastructure projects that our country needs, it is essential that government address the blockages preventing their development. Government has passed the new Planning & Development Act over the past year, which will hopefully achieve its objective of delivering a planning system in Ireland to meet the needs of the country as its population continues to grow toward six million people. Our own members face similar issues with excessive planning delays in the authorisation of extensions to existing quarry locations, an issue which we will highlight in 2025. It is essential that the revised National Planning Framework provides a foundation for the strategic planning and development of Ireland for the future, for which the sustainable supply of aggregates and concrete materials is strategically indispensable.

Similar to other sectors, there is ever-increasing attention focused on our industry's response to the challenges posed by climate change. Last year, the government published "Reducing embodied carbon in cement and concrete through public procurement in Ireland" which ICF welcomed. While our industry will work hard to reduce concrete's embodied carbon, it is essential that policy makers realise that concrete is not particularly carbon intensive when compared to other materials, but it is the most used man-made material on the planet and for good reason. ICF will shortly publish research which will challenge common assumptions about building materials by showing that there is no appreciable carbon saving in switching the structure of houses and apartments from concrete to other alternatives and there is no 'silver bullet' solution

FOREWORD BY THE PRESIDENT, DONAL RIGNEY

when it comes to reducing the embodied carbon of new homes. Indeed, the many other advantages of concrete, such as fire resistance, durability, longevity, thermal mass and a resilient, local supply chain, along with new advancements in low-carbon concrete, make it a superior choice for building sustainably.

The health and safety of our employees is of paramount concern for ICF and our member companies. The ICF Health and Safety Committee will continue to partner with the Health and Safety Authority (HSA) on industry quarry safety campaigns and our members are encouraged to proactively carry out risk assessments and ensure safe operating procedures are implemented. As with any hazardous workplace environment, preventative measures are key to ensuring the safety of workers. Clear communication is also crucial to ensuring that workers are aware of safety measures and that they receive instruction and safety training relevant to the tasks that they undertake. ICF remains committed to improving the safety, health and welfare of all persons involved in the quarrying industry and industry safety campaigns are a key part of that effort and we welcome the support of the HSA which is key to their success.

As with all industries, the development of product standards and their associated guidance is of critical importance to the ICF. The federation continues to be an active participant in the development and revision of standards related to the aggregates and concrete products industry. ICF staff and representatives from our member companies are highly involved in expert committees within the National Standards Authority of Ireland (NSAI) where they contribute positively to standards development. In addition, ICF is also highly involved in the dissemination of information on standards and will continue to regularly update members on changes to these standards and associated guidance in the coming year. I would like to take this opportunity of thanking the participants from ICF member companies who contribute to many different panels within the NSAI for their efforts.

There are many other important issues being faced by ICF and its members on a daily basis which will be addressed in our Chief Executive's report. In conclusion, I would like to thank the members for their continued support for ICF and to thank my fellow council members for their guidance and expertise which is always generously given. On a personal note, I would like to express my thanks to the ICF Council for nominating me as President of the federation and to ICF members who ratified my appointment at our most recent Annual General Meeting.

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.



Donal Rigney
President



**"ROSCOMMON COVERED SPACE"
WINNER ELEMENT CATEGORY
42ND IRISH CONCRETE SOCIETY AWARDS
MAJOR SUPPLIER: URBANCRETE**

CHIEF EXECUTIVE'S REPORT GERRY FARRELL



It gives me great pleasure to present the Annual Report of the Irish Concrete Federation for 2024, a year of global political upheaval in which voters in more than 60 countries went to the polls, including in Ireland. The year will also probably be primarily remembered for the continued Russian offensive in Eastern Europe, upheaval in the Middle East, yet more developments in artificial intelligence and an increase in extreme weather events due to climate change.

There is little doubt that 2024 was a year in which incumbent political parties in power around the globe were punished by voters. This was the case in India, Japan, South Africa and closer to home, in the United Kingdom and the United States. In addition, voters in France punished French President Emmanuel Macron in snap parliamentary elections while Germany's ruling coalition crumbled after its constituent parties fared poorly in state elections in September.

Without doubt Donald Trump's win in the U.S. Presidential election will go down as the greatest political comeback in U.S. history, which reflects his unique appeal to Republican base voters, public dissatisfaction with the economy and illegal immigration and President Biden's low public approval ratings. The question now is how much and how fast President Trump will change things. One of the most immediate threats to Ireland's economic prosperity is the possibility of the introduction of tariffs on goods imported by the US, given the large quantities of pharmaceuticals manufactured in Ireland that are sold in the States. President Trump has also indicated that he will radically overhaul corporation tax in the US which is currently charged

at 21%. US multinationals employ 200,000 people in Ireland and provide huge amounts of investment and make a major contribution to Ireland's corporation tax receipts. The Central Bank has said that changes in US policies are the biggest threat to the Irish economy and therefore the Irish government, along with EU partners, will need to use Europe's collective bargaining power to negotiate mutually beneficial trading arrangements with the US in the coming year.

The events unleashed by Hamas's October 2023 attack on Israel continued to reverberate across the Middle East in 2024 as Israel continued its war in Gaza. The death toll now exceeds 45,000 and northern Gaza is on the verge of famine. At this stage there are little signs of hope for a future peace. There are similarly little signs for hope of resolution of Russia's war on Ukraine which entered its third year. As 2025 starts, the question is whether Russia and Ukraine can continue their gruelling war of attrition, with calls for a negotiated ceasefire growing. It is also clear that the Trump presidency may change US policy towards the conflict.

During 2024 the climate continued to heat up and it will go down as the hottest year on record. For the first time, the average global temperature was 1.5°C higher than pre-industrial times, the level at which the 2015 Paris Agreement seeks to keep the world from breaching permanently. Another high profile feature of the year was the developments in artificial intelligence, which continue to turn science fiction into science fact.

Domestically, the 2024 Irish general election took place on 29th November with the number of TDs



Gerry Farrell ICF, Hilary Byrne Senior Inspector HSA, Conor O'Brien Chief Executive HSA

increasing from 160 to 174, making it the largest Dáil in the history of the state and an increase in the number of constituencies from 39 to 43. The election resulted in Fianna Fáil remaining as the largest party, increasing its number of seats to 48, while Fine Gael won 38 seats, with the two parties combined falling short of a majority by 2 seats. As talks continue about forming a new government, there is little doubt that it faces substantial challenges in its maiden year, particularly given the events in the US as I mentioned previously. From our industry's perspective it is clear that the Government will need to invest heavily in housing and infrastructure particularly transport, water and the electricity grid, all of which will require the essential materials being produced on a daily basis by our members.

Economically, socially and politically housing represents the biggest challenge facing the incoming government. The outgoing coalition significantly increased spending on housing, ramped up the Land Development Agency and put a greater emphasis on schemes like Help-to-Buy. Notwithstanding this focus on housing, residential construction

was disappointing in 2024. It is likely that house completions in 2024 will fall when compared to the previous year's total of 33,000. On a more positive note, there was a strong increase in housing commencements during the year which doubled from the previous year's level to over 69,000. Hopefully this level of commencements will lead to a strong level of activity for ICF members in the coming year.

Throughout the year, ICF continued to proactively represent our membership on a large number of policy areas. This is largely driven by the work of our 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 2024 were as follows:

Mr Donal Rigney
Roadstone, President (elected November 2024)

Ms Caroline Quinn
Concast Precast Group

Mr John Farragher
Concrete Manufacturing Company (CMC)

Mr Mark Galvin
Ardfert Quarry Group

Mr Peter Gleeson
Gleeson Quarries

Mr Frank Healy
Ducon Concrete

Mr Christy Loughnane
Loughnane Concrete (Birr)

Mr Derry McKeown
Kilsaran International

Mr John O'Connor
Flood Group

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. At the federation's Annual General Meeting in November, Donal Rigney, Managing Director of Roadstone was elected President of ICF for a two year term, replacing the outgoing President, Christy Loughnane of Loughnane Concrete (Birr). We look forward to Donal's leadership of the federation and of course, we express our deep appreciation for Christy's stewardship during his two terms of office. ICF has always benefited from the leadership of highly respected people from within the industry, which will continue to sustain the organisation in future years.

The key item for the Council during the year was the continued engagement with Government on the implementation of the Defective Concrete Products Levy. In March, Council representatives met with the Department of Finance and the Revenue Commissioners which resulted in the publication by Revenue in April of an ebrief on a standardised methodology for calculating the open market value

of concrete products for the purpose of calculating the levy. While ICF opposes the principle of the levy, we appreciated the engagement of the Department of Finance and the Revenue Commissioners and we will continue to represent the industry on this issue in the future.

As I reported last year, the ICF Council oversaw the development of a sustainability plan for the federation by RPS Consulting in 2022 and implemented the first key recommendation of the plan with the appointment of Conor Hayes who joined us in January as our new Head of Sustainability. Conor joined the ICF team from Arup where he was an Associate and Chartered Structural Engineer and was Arup's Global Structural Sustainability Skills Manager. Conor has been 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 ICF 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 continued 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 2025 to follow up on our 2019 publication – "Essential Aggregates - Providing for Ireland's Future to 2040".

The Council also oversees the federation's Annual General Meeting which this year included presentations from Conor O'Toole of the Economic and Social Research Institute, Hubert Fitzpatrick of the Construction Industry Federation, Lisa Saunders of Minerals Matter (UK), Frank Gallagher of the Department of the Environment, Climate and Communications, Stephen O'Shea and Thomas Lowry of Cairn Homes and our own Conor Hayes.



Gerry Farrell ICF, Hubert Fitzpatrick Director General, Construction Industry Federation.



Lisa Saunders, Director, Lisa Saunders Consultancy.



Gerry Farrell ICF, Frank Gallagher Department of the Environment, Climate and Communications.

Responsibility for the organisation's finances, which remain on a solid footing, lies with the ICF 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 COMMITTEE

The members of the Health and Safety Committee in 2024 were as follows:

Mr Paul Gallagher
Ducon Concrete (Chairman)

Ms Mary O'Brien
McGraths Limestone, Cong

Mr Vincent Flanagan
B D Flood

Mr Sean Monaghan
B D Flood

Mr Noel Morgan
Flood Precast

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 Concrete

Mr Brendan Donagher
Concast Precast

Ms Aine Black
Shay Murtagh Precast

Mr Dennis 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

Ms Sarah O'Connell
O'Connell Concrete

Mr Ciaran Columb
MC Group

In 2024, 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 May and focused on the management of contractors. A second campaign took place in September and October which focused on guarding and maintenance. Over the two campaigns over 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, the HSA met with our Health and Safety Committee to provide valuable feedback on both campaigns. 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 continues to maintain a high visibility in the quarrying sector to constantly reinforce the importance of safety among our membership. We plan to hold a major industry health and safety conference in early 2025 at which I am sure we will receive valuable support from our members and the HSA.

In January, ICF met with the Department of Further and Higher Education, Research, Innovation and Science on the progress of the Construction Safety Licencing Bill which is passing through the Oireachtas currently. In September, ICF made a submission to the Department on the draft legislation which will reform the Quarry Safety Certification Scheme. Our Health & Safety Committee also monitored progress of the implementation of the Dangerous Substances (Flammable Liquids and Fuel Distribution and Commercial Supply Stores) Regulations 2019. The committee were also represented on the Quarry Safety Partnership within the Health and Safety Authority.

PLANNING & ENVIRONMENT COMMITTEE

The members of the Planning and Environment Committee in 2024 were as follows:

Mr Mark Galvin
Bennettsbridge Limestone (Chairman)

Mr Fergus Gallagher
Kilsaran Concrete

Mr Stephen Linden
Mannok

Mr Billy McGrath
McGraths Limestone, Cong

Mr Ronan Griffin
CRH

Mr John Glynn
Roadstone

Mr Vincent Flanagan
B D Flood

Ms Amanda Tarpey
Harrington Concrete and Quarries

Mr Conor Quirke
M F Quirke & Sons



42nd Irish Concrete Society Awards Winner of the Sculpture Award: 'Archiving Hope' by Fiona Hayes

Ms Sarah O’Connell
O’Connell Concrete

Mr Brian Downes
Breedon Ireland

Mr John Fennell
Breedon Ireland

Once again, the ICF’s Planning & Environment Committee was highly active on a number of fronts in 2024. The committee met with the Environmental Protection Agency (EPA) on the introduction of a registration and licensing regime for water abstractions legislated for under the Water Environment (Abstractions and Associated Impoundments) Act 2022. The meeting followed a submission by ICF to the agency during the summer which highlighted the many aspects of water management already being undertaken by ICF members. ICF will continue to engage with the EPA and the Department on this issue in 2025.

In February, our Planning and Environment Committee and Technical Committee hosted a briefing by the EPA for members on the national end-of-waste criteria for recycled aggregates recovered from waste concrete. While welcoming the criteria, ICF members were disappointed at the limitations imposed on the uses of recycled aggregates in concrete. Given that recycling is seen as a key element of the industry’s sustainability plans, ICF will continue to work with the EPA and other stakeholders to achieve greater circularity in our industry and consequently the overall construction sector.

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 2024. The report will focus on the importance of aggregates to Irish society, the reducing reserves 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.

ICF is in the process of developing guidance for members on the government’s new Planning and Development Act, 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. This guidance will be published for members in the coming year.

In June, ICF and other representative bodies met with the Department of Environment, Climate and Communications (DECC) on the removal of waste levy exemptions for construction and demolition waste. In July, ICF made a submission to DECC on this issue and welcomed the department’s decision to postpone the removal of the levy exemptions until September 2025 at the earliest and to exclude brownfield waste soil and stone from any future levies.

In February, the National Monuments Service of the Department of Housing, Local Government and Heritage made a presentation to the Planning and Environment Committee on the Historic and Archaeological Heritage Act 2023 which will see greater protection for archaeological heritage and the development of a new Register of Monuments. ICF also met with the National Monuments Service in November. I would like to thank the ICF Project Archaeologist Dr Charles Mount for his ongoing guidance to the committee and his engagement with the National Monument Service on our behalf.

TECHNICAL COMMITTEE

The members of the Technical Committee in 2024 were as follows:

Mr Alan Lowe
Roadstone (Chairman)

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 Concrete

Mr Patrick Cullivan
B D Flood

Mr Eanna Nolan
Irish Concrete Society

Mr Fintan Keane
Harrington Concrete and Quarries

Mr Sean Cassidy
Breedon Ireland

Mr Brendan Lynch
Consultant

The ICF 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. ICF contributed to the ongoing review of 'SR325 – Design of Masonry Standards in Ireland to Eurocode 6' and a review of 'SR 16 – Guidance on Aggregates for Concrete' which continued during the year.

The committee oversaw the development of a test methodology for concrete block durability, which is being carried out in association with Technological University Dublin (TUD). During the year ICF briefed all members on the benefits of the testing methodology and members are now engaging directly with Dr Niall Holmes of TUD. On a tragic note, all committee members were shocked at the untimely passing of Dr Bart Wojciechowski of TUD in early 2025. Bart was highly involved and contributed greatly to the project to develop the test methodology for concrete block durability. May he Rest in Peace.

Throughout the year the ICF engaged regularly with the Department of Housing, Local Government & Heritage, the National Standards Authority of Ireland, the National Building Control and Market Surveillance Office (NBCMSO) and Geological Survey Ireland on technical matters. ICF is nearing completion of 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, which is part of a construction industry initiative on masonry construction. The initiative was launched at a HomeBond conference in Cork in October.

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 reviews of the Construction

Products Regulation (CPR) and EN206. In March, the Department of Housing, Local Government and Heritage made a presentation to the committee on the review of the CPR.

SUSTAINABILITY

ICF activity on sustainability took on a new momentum in 2024 with the appointment of Conor Hayes as our new Head of Sustainability. Without doubt Conor has brought a new vision and expertise to the organisation which will greatly benefit our members and the industry in general in the coming years.

"Reducing Embodied Carbon in Cement and Concrete through Public Procurement in Ireland", was published in May by the Department of Enterprise, Trade and Employment. ICF met the Department in September and welcomed this guidance to public bodies on the design of public projects and the procurement of cement and concrete products. ICF contributed to the stakeholder consultation process and briefed our members on the development of the new guidance throughout the year.

During the year ICF set up a Sustainability Communications Working Group to develop communication strategies on concrete and sustainability. ICF has also commenced a whole life carbon assessment study of houses and apartment buildings. The purpose of the study is to develop accurate data to counter overly simplistic claims on the environmental benefits of some forms of construction and to highlight the minimal differences between whole life carbon impacts of houses and apartments built in concrete and those built with alternative materials.

During the year an Environmental Product Declaration (EPD) working group was established to complete the task of developing industry EPDs for aggregates, ready mixed concrete and concrete blocks. These will be completed in 2025 and will be hosted on EPD Ireland, which is operated by the Irish Green Building Council. In September, ICF joined the Irish Green Building Council.

One of the key elements of the ICF's sustainability strategy is to increase the level of recycling in the industry and ICF welcomes the various published EPA end-of-waste and national by-product criteria as a means to improve circularity in Irish construction. ICF hosted a briefing in February by the EPA for members on the National End-of-Waste Criteria for Recycled Aggregates. ICF sees the publishing of this decision as an important first step in increasing recycling levels in Ireland. However, we believe

that the restrictions on the uses of recycled aggregates in the decision will be a barrier to an immediate increase in recycling and we are committed to achieving a more extensive use of recycled aggregates in the future. During the year a working group on recycling was established by the ICF. Membership of the working group includes ICF members, Irish Waste Management Association, Construction Industry Federation, Irish Geological Institute and demolition contractors. The intent is to develop a proposal to the EPA to extend the allowable use of recycled aggregates. Simultaneously ICF will work with stakeholders on relevant NSAI committees through the standards revision process to achieve this objective.

The Department of Environment, Climate and Communication decision to amend the Circular Economy (Waste Recovery Levy) Regulations to remove the levy exemptions for construction and demolition waste with effect from September 2024 was a cause of great concern for members. The proposed introduction of a €10/tonne levy on soil and stone being accepted into our members locations, including for the purpose of quarry restoration would have significantly increased construction costs and impacted recycling streams for soil and stone and concrete. ICF welcomed the decision by the Department, following negotiations with industry stakeholders in July, to delay the introduction of a levy on greenfield soil and stone waste and to exempt brownfield soil and stone from future levies. ICF also welcomed the subsequent publication of national by-product criteria for greenfield soil & stone by the EPA.

In October, ICF made a submission to the Department of Environment Climate and Communications on draft regulations to reform the End-of-Waste decision-making process operated by the EPA with the aim of streamlining the end-of-waste application and decision-making process.

HUMAN RESOURCES FORUM

The members of the ICF Human Resources Forum in 2024 were as follows:

Ms Aine Black
Shay Murtagh Precast

Ms Caroline McCaffrey
Mannok

Ms Caroline Quinn
Concast Precast Group

Ms Enda Keenan
Kilsaran Concrete

Ms Veronica Gill
Kilsaran Precast

Ms Jennifer Flynn
O'Reilly Concrete

Mr Shane Casey
Roadstone

Ms Linda McGrath
McGraths Limestone (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

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 briefs members on the implications for their businesses. During the year, the forum discussed issues such as Statutory Sick Pay, Good Faith Engagement, and the introduction of the autoenrollment retirement savings system. The forum also oversaw the federation's annual industry salary and benefits survey and held regional HR briefings for all members in March.

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 Neil McConomy
Roadstone

Mr T J Lennon
Lennon Quarries

Mr Roy Hegarty
Kilsaran Concrete

Mr Michael Keohane
Keohane Readymix

Mr Micheál Gleeson
Gleeson Concrete

Mr Shane Tierney
B D Flood

Mr Damien McGrath
McGrath Limestone Quarries

Mr Emmet Cosgrove
O'Reilly Precast

Mr Brendan Mahon
Banagher Precast

Mr Marcus Sweeney
Techrete

Mr Alan Brennan
Killeshal Precast

Mr John O'Connor
Flood Precast

Mr Thomas Coyle
Mannok

The ICF Transport Committee oversaw guidance for our membership on 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 2023. 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.

IRISH PRECAST CONCRETE ASSOCIATION

The members of the IPCA Council in 2024 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

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.

While the key issue for IPCA throughout 2023 was to ensure the exclusion of precast concrete products from the scope of the Defective Concrete Products Levy (DCPL), the focus of the association in the early part of 2024 was the administration of the levy and ensuring the repayments of levies paid on precast concrete products during the September – December 2023 period. By year end it was estimated that a total of €500,000 had been repaid to precast concrete manufacturers. During the year IPCA contributed to positive engagement by ICF with the Department of Finance and the Revenue Commissioners on the administration of the levy.

The growing importance of Modern Methods of Construction (MMC) will undoubtedly lead to greater use of offsite manufacturing in the future, which will in turn generate opportunities for precast concrete manufacturers. In September, IPCA welcomed Paul Tierney, Chief Executive of MMC Ireland, to address the association's council meeting. IPCA looks forward to future potential engagement with MMC Ireland which was established to develop and promote Ireland's MMC sector.

IPCA also contributed to a Department of Housing / Construct Innovate initiative on modern methods of construction related to the development of standardised design details for MMC residential construction systems and IPCA attended a workshop on the progress of the MMC Demonstration Park in Mount Lucas, Co Offaly. The association also monitored



**"ULSTER CANAL RESTORATION PROJECT"
INFRASTRUCTURE CATEGORY
42ND IRISH CONCRETE SOCIETY AWARDS
MAJOR SUPPLIERS: BANAGHER PRECAST
CONCRETE/SHAY MURTAGH PRECAST/
WRIGHT QUARRY PRODUCTS**

the development of green procurement guidelines for cement and concrete by the Department of Enterprise, Trade and Employment.

GROUND LIMESTONE PRODUCERS ASSOCIATION OF IRELAND

The members of the GLPAI committee in 2024 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 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.

2024 proved to be a particularly busy year for the association, due primarily to the continued implementation of both the National Liming Programme 2023 and the National Fertiliser 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. Unfortunately, due to the oversubscribed nature of the scheme allied with poor weather, the Department of Agriculture was required to extend the spreading deadline for lime purchased under the scheme to October 31st of this year. GLPAI worked closely with the Irish Farmers Association and the Department of Agriculture on the administration of the scheme.

GLPAI met with the Department of Agriculture, Food and the Marine in June to review the progress of lime reporting to the National Fertiliser Database. GLPAI will continue to assist its members engage with the database which will see all sales and purchases of fertiliser including lime being reported on the database.

In November, GLPAI met with Dr Mark Plunkett of Teagasc who presented to the association on the role of lime in reducing farm emissions. Dr Plunkett's presentation highlighted the benefits of improved soil pH in reducing soil N₂O emissions and the release of up to 70kgs of organic nitrogen per hectare. While these benefits are well recognised, GLPAI was disappointed at some concerning commentary surrounding the release of the EPA's Quarterly Greenhouse Gas Emissions Indicator Report that suggested that reduced liming was beneficial in terms of reduced agricultural emissions. GLPAI looks forward to engaging with Teagasc and the EPA on this issue in the New Year.

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 – Aggregates Europe, 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 Aggregates Europe 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. ICF looks forward to hosting the committee meetings of UEPG – Aggregates Europe in March of the coming year.

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 2024 are included on the following list and I apologise for any inadvertent omission from the list.

- Department of Environment, Climate & Communications
- Department of Transport
- Department of Further and Higher Education, Research, Innovation and Science
- 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
- Irish Concrete Society
- Irish Farmers Association
- Irish Mining & Quarrying Society
- Uisce Éireann
- Local Authorities
- Mineral Products Association (UK)
- Mineral Products Association (Northern Ireland)
- National Monuments Service
- National Standards Authority of Ireland
- National Building Control and Market Surveillance Office
- Road Safety Authority
- Royal Institute of Architects of Ireland
- Solas
- Teagasc
- Transport Infrastructure Ireland
- Alliance for Insurance Reform
- Build Digital
- An Coimisiún Pleanála
- An Garda Síochána
- An Taisce
- Association of Consulting Engineers of Ireland
- Cement Manufacturers Ireland
- Construction Industry Federation
- Construct Innovate
- Department of Agriculture, Food and the Marine
- Department of Housing, Local Government & Heritage
- Department of Enterprise, Trade and Employment



Eoin O'Carroll, Chairman GLPAI and Mark Plunkett, Teagasc.

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 communication with our member organisations allows 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 and the organisation's website. The organisation now administers 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.

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 would like to thank the many dedicated and professional individuals from our member companies who contribute to ICF activities and whose input is highly regarded and never taken for granted.

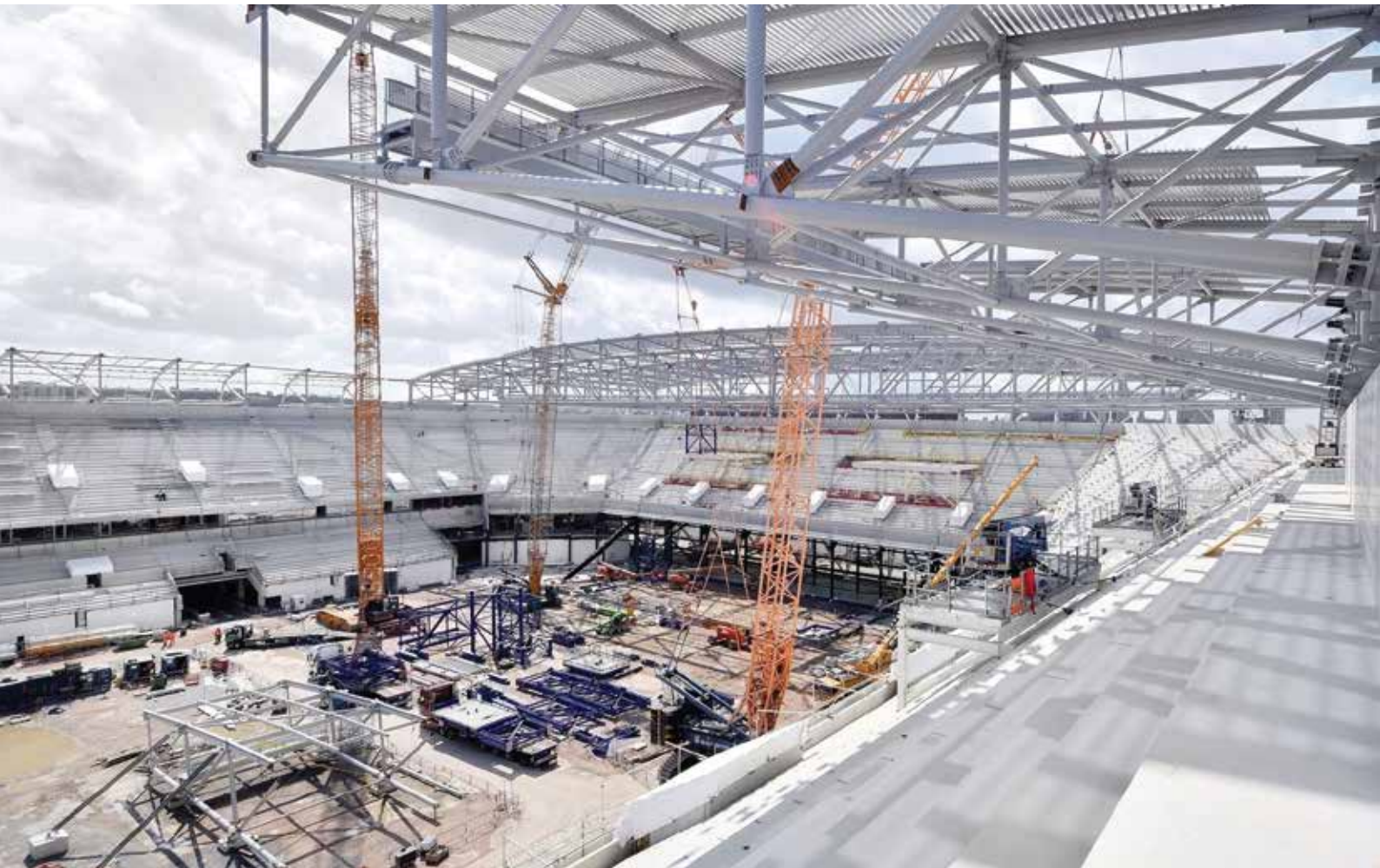
I would therefore like to express my gratitude once again to the Council, committees and members of the Irish Concrete Federation for their ongoing commitment throughout 2024. We look forward to continuing this work in 2025 which promises to be yet another busy and challenging one for ICF.

I would like to thank our President, Donal Rigney for his leadership of the organisation and I look forward to working with him 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, Gwen Synnott and Conor Hayes who contribute greatly on a daily basis to this organisation. I would also like to express my thanks to Dr Charles Mount for his work as ICF Project Archaeologist.

Geen Farrell





"EVERTON STADIUM"
WINNER INTERNATIONAL AWARD
42ND IRISH CONCRETE SOCIETY AWARDS
MAJOR SUPPLIER: BANAGHER PRECAST
CONCRETE

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

Opinion

We have audited the financial statements of Irish Concrete Federation CLG (the Company), 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 2024, 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 (the Company)'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 2024 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

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

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, excluding the requirements on sustainability reporting in Part 28.

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.

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)

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 on 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.

John Botha
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 2024

	2024 €	2023 €
Turnover	1,057,025	1,066,214
Gross profit	1,057,025	1,066,214
Administrative expenses	(882,691)	(854,946)
Operating profit	174,334	211,268
Interest receivable and similar income	2,029	1,196
Interest payable and similar expenses	(1,003)	(1,166)
Profit before tax	175,360	211,298
Tax on profit	(1,826)	(1,568)
Profit for the financial year	173,534	209,730

Statement of Financial Position

As at 31 December 2024

	2024 €	2023 €
Current assets		
Debtors: amounts falling due within one year	925,870	1,084,341
Cash at bank and in hand	2,954,699	2,669,679
	3,880,569	3,754,020
Current liabilities		
Creditors: amounts falling due within one year	(110,096)	(157,081)
Net current assets	3,770,473	3,596,939
Net assets	3,770,473	3,596,939
Capital and reserves		
Capital contributions	99,420	99,420
Profit and loss account	3,671,053	3,497,519
Shareholders' funds	3,770,473	3,596,939

ICF COUNCIL MEMBERS 2024

MR DONAL RIGNEY (PRESIDENT)

Roadstone, Belgard, Tallaght, Dublin 24 PKK2

MR CHRISTY LOUGHNANE

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

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 2024



*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.*



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