



Irish Concrete Federation



Annual Report 2009

Concrete Built **is** Better Built

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.

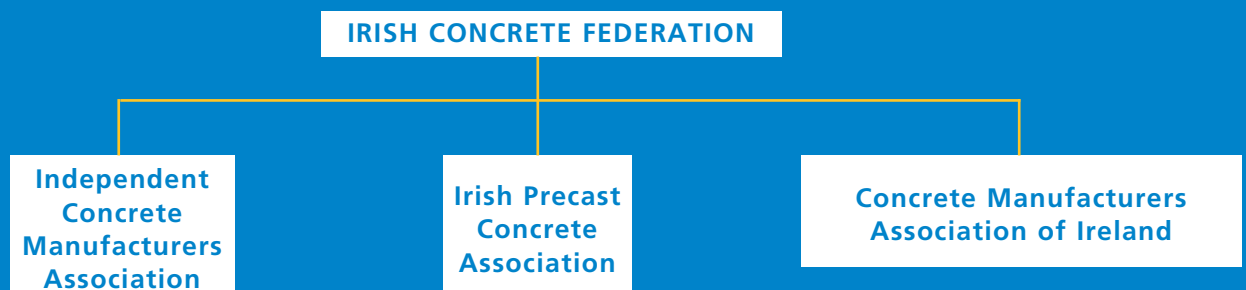
We seek to develop successful and mutually beneficial relationships with customers, suppliers, communities and the construction industry.

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 Structure



Affiliations

ICF is a member of ERMCO, European Readymix Concrete Organisation and of UEPG the European organisation for Aggregate producers.



EUROPEAN READY MIXED CONCRETE ORGANIZATION
ASSOCIATION EUROPEENNE DU BETON PRET A L'EMPLOI
EUROPÄISCHER TRANSPORTBETONVERBAND



(Union Européenne des Producteurs de Granulats).



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Cover Photo Harry Blaney Bridge courtesy of RPS Consulting Engineers



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FOREWORD BY THE PRESIDENT, CHRISTY LOUGHNANE

As President of the Irish Concrete Federation, it gives me great pleasure to introduce the Annual Report for 2009.

Firstly, I would like to thank my predecessor, Mr Alan Haugh, who stepped down as President of the Federation in mid 2009 for his efforts on behalf of the members of the ICF in guiding the Federation prior to my appointment.

Every year sees change in our industry but there is little doubt that 2009 brought about the most radical change to our industry witnessed in recent times. Without exception there was a dramatic fall off in the demand for members' products when compared to 2008. House building continued at a fraction of activity in previous years, while investment in commercial and retail developments was severely reduced from levels seen throughout the previous decade. Investment in agricultural buildings by our farming customers also contracted substantially following the ending of the Farm Waste Management Scheme in December 2008. Unfortunately, this trend in construction activity continued unabated for the entirety of 2009 and, as we all know, has continued into 2010.

The fall in investment in private sector construction was unfortunately not cushioned substantially by Government investment. While investment in our public infrastructure, particularly our transport infrastructure, remained strong in 2009, all the evidence points towards a severe contraction in this level of expenditure by Government in 2010 and beyond. The Irish Concrete Federation in no way wishes to seek to have output return to that experienced in the middle of the last decade. However, ICF would point out that investment in strategic infrastructure is critical to assist our country to escape from the clutches of this recession. Simultaneously this investment can help protect jobs in construction and in related industries like our own. The need to reduce costs was evidenced by an ICF survey in November which reported that employment levels in our industry had halved from those seen in the middle of the last decade.

Throughout 2009, the ICF maintained an extremely active programme of work carried out largely by our committees. Our Marketing and Technical Committees continued to monitor the development of Ireland's first ever concrete built zero carbon emissions house in the midlands, an initiative which will clearly show the ability of concrete to meet the most exacting demands of future house construction. Our Health and Safety Committee oversaw



Christy Loughnane, President Irish Concrete Federation 2009.

the ICF Health and Safety Awards and I would like to congratulate all those who received awards in 2009. Clearly health and safety has to remain a priority for our members even in the current economic climate. Our Terms and Conditions of Sale Committee produced a Best Practice Guide on Credit Management for our members which adopted best practice advice available in the market place for the benefit of our members. Our Planning and Environment Committee continued to monitor the development of legislation in relation to planning for quarries. ICF remains committed to the view that there is a need for a level playing pitch for all operators operating to the highest planning and environmental standards in Ireland

and this can only be achieved through strict enforcement by Government and local authorities. Our Transport Committee made submissions on the testing of pressure equipment, spray suppression, digital tachographs and the Working Time Directive. The Transport Committee continues to promote best practice in transport operations and drivers safety in our industry through publications such as our Drivers Handbook and our annual meeting with An Garda Síochána.

The Chief Executive's report will give a summary of these issues and many others which the Federation addressed on behalf of its members in 2009. As President, I would particularly like to thank the members of all of the various committees which develop the work programme for the Federation. This work does not go unnoticed. On behalf of all the members I would like to express my appreciation to them for their work.

In particular I would like to thank the members of ICF Council for their support for me since I became President and I look forward to working with them in 2010.

Finally I would like to thank the staff of the Federation who, despite the downturn and reduced staffing levels, have continued to provide ICF members with a professional and valuable service throughout 2009. The Federation's service is greatly valued by the members and we look forward to expanding membership of the Federation through the good work being carried out by the staff in Newlands Cross.

A handwritten signature in black ink that reads "Christy Loughnane". The signature is fluid and cursive, with a long horizontal stroke at the end.

Christy Loughnane, President

CHIEF EXECUTIVE'S REPORT

Introduction

2009 was a year of substantial change in the concrete manufacturing industry in Ireland. The reduction in demand for members' products in 2008 continued into early 2009 and this trend accelerated as the year progressed. It is estimated that output in our industry halved in the 12 month period ending December 2009 which obviously presented major challenges to our industry.

In a strategic analysis of our industry in 2005, it was estimated that domestic residential construction accounted for almost half of industry output. One only has to look at the housing commencement numbers in 2009 of which there were 8,611 compared to almost 23,000 in 2008 to see the statistical evidence of the collapse in activity in this sector of the construction industry.

Similarly, the ending of the Farm Waste Management Scheme at the end of December 2008 and the subsequent problems associated with payment of grants to farmers limited any investment by our farming customers in farm buildings throughout 2009.

Commercial infrastructure, be it industrial or retail, ground to a halt throughout 2009 with the result that whatever activity was evident throughout the year was largely driven by Government spending on our national infrastructure. It is estimated that approximately €7.3 billion was spent by Government in funding public infrastructure projects throughout 2009. While this is a substantial investment programme, it does not come close to replacing the work lost by lack of investment by the private sector in construction projects. While the ICF in no way promotes a return to the heady days of 2005, 2006 and 2007, there is little doubt that unless Government continues to invest in key strategic infrastructure, the economic trends in our industry will not see a reversal of fortune.

In November 2009, the ICF carried out a telephone survey of all its members in relation to employment. Arising from that survey, it is estimated by the Federation that approximately half of the people who were employed in the industry in the middle of the past decade have been forced to leave our industry due to the recession. In November, the Federation wrote to every T.D. in Dáil Éireann and met with Minister Gormley, Minister Harney and leading politicians of the opposition parties in December 2009 to present our views to them. The



ICF Chief Executive, Gerry Farrell.

key message related to our Government representatives was the need for continued investment in infrastructure in order to address the country's infrastructural deficit and competitiveness while at the same time maintaining employment in construction related businesses. While Government has correctly targeted the export sector as the catalyst to a return to growth in our economy, the fact remains that the losses in construction employment will be impossible to counter balance by growth in the export sector alone.

Representation & Committees

Throughout 2009, the Irish Concrete Federation, while operating in a very difficult economic climate, continued to professionally represent its members. The Federation is driven by its members and the work of its members on the various committees which comprise the Federation. It is important to recognise the voluntary work of the members of the ICF, who give of their time to contribute to the overall strategic direction of our industry and for this work I would like to thank them sincerely.

The Federation is driven by a Council of 8 members which oversees the work of all the committees operating within



the Federation. The Council members in 2009 were:

Mr Christy Loughnane	Loughnane Concrete (Birr) Ltd
Mr Alan Haugh	CPI Ltd
Mr Peter Gleeson	Gleeson Concrete Ltd
Mr Frank Byrne	Roadstone Wood Ltd
Mr Mark Guinan	Cemex (ROI) Ltd
Mr Barry O'Reilly	O'Reilly Brothers Ltd
Mr Finbarr O'Neill	Finbarr O'Neill Ltd
Mr John Joe McGrath	McGrath Limestone Works Ltd
Mr Declan McCartney	Kilsaran Group

On behalf of the members of the Federation, I would like to thank the Council for all of their time and support to myself and the Federation throughout 2009.

The Federation has 6 active committees operating within its structure. These are as follows:

- Planning and Environment Committee
- Health and Safety Committee
- Technical Committee
- Marketing and Promotion Committee (Concrete Development Group)
- Transport Committee
- Terms and Conditions of Sales Committee

All of these committees have representatives of a broad range of ICF members and it is these committees that drive the activities of the Federation on a daily basis.

Linkages with Other Organisations

The Irish Concrete Federation continued to develop relationships with key stakeholder groups which impact on the industry and the industry environment in which our members operate. Throughout the year, ICF worked with stakeholders such as the Department of the Environment, Heritage and Local Government, the Department of Transport, the Road Safety Authority, the Health and Safety Authority, Sustainable Energy Ireland, the Department of Agriculture and Food, all local authorities, Geological Survey of Ireland, An Bord Pleanála, An Taisce, Irish Concrete Society, the Environmental Protection Agency, the National Roads Authority and a large number of third level educational institutions and professional bodies. I would like to thank all of those organisations for their assistance to the Federation throughout 2009.

Planning and Environment Committee

Under the guidance of Liam Smyth, the Federation's Sustainability and Marketing Manager, the Planning and Environment Committee continued to have an active work programme throughout 2009. Much of the work programme centred around the European Court of Justice Decision C215/06 of 3rd July 2008 which could have major implications for the extractive industry. In early 2009, ICF met with the Department of the Environment, Heritage and Local Government and made a submission to the Department on behalf of its members in relation to this issue. In March, ICF met with the European Commission and again made our proposal in relation to these issues. In addition, ICF made representations to An Taisce and the Environmental Protection Agency on the need for the creation of a sustainable extractive sector operating from a level playing pitch and meeting the highest environmental standards. ICF also continued to promote a higher level of enforcement of planning legislation.

ICF continues to promote best practice in relation to planning and the environment with its members. However there is need for a similar commitment by the local authorities in relation to the issue of unauthorised development. While our industry contracts, it is imperative that local authorities and Government are seen to source materials from those operators who show commitment to compliance with their planning status and operate to the highest standards of environmental practice. In this respect, ICF welcomes the inclusion of the introduction of a licensing system for quarries in the revised Programme for Government.



Minister for the Environment, Heritage & Local Government Mr John Gormley TD addressing ICF and IMQS Environmental Seminar in November.

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In May 2009, our revised ICF Archaeological Code of Practice was launched by Minister Gormley. Archaeology continues to play a major role in the work programme for the Irish Concrete Federation and the ICF would like to express its thanks to Dr. Charles Mount, the Project Archaeologist, who oversees the implementation of the Archaeological Code of Practice in the industry.



Dr Charles Mount, ICF Project Archaeologist; Minister John Gormley TD; Mr Gerry Farrell, Mr Brian Duffy, Chief Archaeologist, Department of the Environment, Heritage & Local Government; Mr Liam Smyth, Sustainability & Marketing Manager, ICF.

In November the Federation welcomed Minister for the Environment, Heritage and Local Government, Mr. John Gormley, T.D. to address our annual Environmental Seminar which this year was run in association with the Irish Mining and Quarrying Society. The Federation used the occasion to impress on the Minister the need for a workable solution to the issues arising from the European Court of Justice Decision for the extractive sector which would also address the issue of unauthorised development. ICF's Liam Smyth presented the ICF position on the need to create a sustainable extractive sector in Ireland.

At the November conference, Minister Gormley also launched Biodiversity Guidelines for the Extractive Industry, on which the ICF co-operated with Nature Campaign of the National Parks and Wildlife Service within the Department of the Environment, Heritage and Local Government. ICF will continue to encourage the promotion of biodiversity with its members and highlight the many positive biodiversity benefits which are inherent in extractive sites.

In 2009, the ICF's Planning and Environment Committee also oversaw the development of Architectural Heritage Guidelines for the Extractive Industry which we submitted to the Department of the Environment, Heritage and Local Government. The Federation awaits a response from the Department on this issue but remains committed to the promotion of best practice in our industry with regard to architectural heritage.

The Federation continues to make representation to local authorities in relation to development contributions. There is obviously a need for business to meet its obligation with regard to development and its impact on local areas. This has to be counterbalanced however by a recognition of the need of an industry to remain competitive and maintain employment in the current climate. In addition, the need to address the competition from unauthorised and thereby lower cost operators has to be taken on by individual local authorities.



L to R: Mr Christy Loughnane, ICF President, Mr John Gormley TD, Minister for the Environment, Heritage & Local Government, Gerry Farrell, CEO Irish Concrete Federation and Mr Sean Finlay, President IMQS at the launch of the Guidelines on Biodiversity for the Extractive Sector.



The members of the Planning and Environment Committee in 2009 were:

Sean Loughnane	Loughnane Concrete (Birr) Ltd, Chairman
Brian Downes	Cemex (ROI) Ltd
Daniel Long	Roadstone Wood Ltd
David Tobin	Lagan Group
Fergus Gallagher	Kilsaran
Fintan Coyle	Quinn Group
Keith McGrath	McGrath Limestone Works Ltd
Naomi Cooper	CRH Plc
Ronan Griffin	Roadstone Wood Ltd
Vincent Flanagan	B D Flood Ltd

The Federation would particularly like to thank Mr Derry O'Sullivan, Roadstone Wood Ltd, who retired as Chairman of the Planning and Environment Committee in 2009 and also to thank Mr Sean Loughnane for agreeing to replace Mr O'Sullivan in his position. I would also like to thank Diane O'Donoghue of the ICF for her work as committee secretary.

Technical Committee

The members of the Technical Committee in 2009 were:

Mr Peter Deegan	Banagher Concrete Ltd
Mr William Farrell	Killeshal Precast Concrete Ltd
Mr Trevor Moore	Kellys of Fantane Concrete Ltd
Mr Tom Holden	Roadstone Wood Ltd
Mr Nick Davis	Kilsaran Group
Mr Brendan Lynch	Irish Cement
Mr Richard Bradley	Irish Cement
Mr Peter Seymour	Ecocem
Mr Declan Loane	Quinn Group
Mr Kevin Maguire	Quinn Group
Mr Joe Rice	Cemex (ROI) Ltd
Mr Donal Crowley	Roadstone Wood Ltd
Mr George Beggan	B D Flood Ltd

The Technical Committee continued to meet in 2009 as, despite the ongoing recession, there is the ever present need to continuously review our standards and respond to European developments in this area. The Irish Concrete Federation was happy to support the studies on the implementation in Ireland of Eurocode 2 (Design of Structures) and Eurocode 6 (Design of Masonry). These Eurocodes will enter into force in early 2010 and will have significant implications for the design of buildings in Ireland in the future. The ICF would like to thank the Irish Concrete Society and Engineers Ireland for their continued education of our sector in relation to the implications of these Eurocodes.

The Federation was also very involved in the development of the Irish National Annexes to a raft of European product standards. In late 2009, members of the committee, under the co-ordination of ICF's Liam Smyth, assisted the National Standards Authority of Ireland in the development of Irish National Annexes to 16 European product standards, all with implications for our industry. The Federation will continue to work with the Department of the Environment, Heritage and Local Government and the National Standards Authority of Ireland in the provision of expert advice on the development of these National Annexes. These product standards will be referred to in National Building Regulations and in the Eurocodes and therefore the Federation appreciates all of the effort made by members of the Technical Committee in the drafting of these National Annexes.

Revisions to Building Regulations are continuously on the agenda for the Technical Committee and in 2009 the Federation made a number of submissions in relation to Part E of the Building Regulations (Sound). The Federation is also continuously monitoring the ongoing revision of Part L of the Building Regulations (Energy Efficiency) where a further 20% improvement in the energy efficiency of new residential dwellings is proposed in 2010. It is likely that there will be a revision to Part H of the Building Regulations (Drainage and Waste Water Disposal), on which the Federation will make submissions in 2010.

The Irish Concrete Federation also made a submission on the revisions to IS EN206 which is our own National Concrete Standard. The Federation also supports the work of the Irish Concrete Society Durability Committee whose expertise is heavily relied on in the drafting of any

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changes to IS EN206 and the Federation looks forward to working with the Irish Concrete Society and the NSAI in the future revision of the standard and all standards relevant to our industry. The Federation would like to particularly thank Mr Peter Deegan of Banagher Concrete who continues to chair the ICF Technical Committee.

Health and Safety Committee

While activity in our members has reduced substantially as a result of the recession, there is an increased imperative for all operators in the quarry industry to ensure that health and safety remains to the forefront of our members' minds.

In 2009 the Irish Concrete Federation promoted and delivered training in the Quarry Skills Certification Scheme (QSCS) which was introduced under the Quarry Regulations 2008. While in mid 2009 the Federation ceased its role as an approved trainer for the purposes of QSCS, it continues to promote training under the supervision of FAS and would encourage all of its members to carry out this training to ensure compliance with our Quarry Regulations and to improve the health and safety skills and awareness within our industry.



ICF Health & Safety Awards: Mr David Johnston, Independent Judge; Mr Noel Leacy, Cemex Kildavin (Overall Winner); Mr Anthony Moran Health & Safety Manager, Cemex; Mr Christy Loughnane, ICF President.

In 2009 the Federation continued to reward best practice in health and safety through its health and safety awards which were presented following the Annual General Meeting in June. This year's awards were adjudicated by Mr David Johnston of Jabez Safety Consultants in Northern Ireland and Mr Pat Griffin of the Health & Safety Authority and the Federation would

like to congratulate all of the winners who received rewards. The overall winner of the health and safety awards was Cemex in Kildavin, Co Wicklow. In total there were 19 awards at our ceremony with Cemex, Kildavin being the sole winner of a five star award. The Federation would like to thank all members who made the effort to enter these awards and would encourage an even greater level of participation by members at future awards.



Receiving awards at the ICF Health & Safety Awards were: Mr David Johnston, Independent Judge; Mr Victor Tenner, Harrington Concrete & Quarries, Mr Adrian Maye, Health & Safety Manager, Harrington Concrete & Quarries; Mr Christy Loughnane, ICF President.

The winners of the category awards are as follows:

Overall Winner	Cemex Ltd, Kildavin
Large Quarry Winner	Roadstone Wood Ltd, Slane
Small to Medium Quarry Winner	Roadstone Provinces, Cam
Large Sandpit Category Winner	Harringtons Concrete & Quarries, Carn, Knock
Small Medium Sandpit Winner	Cemex Ltd, Kildavin
Concrete Plant Winner	Cemex Ltd, Portlaoise
Precast Plant Winner	Wright Concrete Products Ltd, Carrickmacross



Pictured at the National Quarry Safety Conference were: Mr Pat Griffin, Health & Safety Authority; Mr Tom Parlon, Construction Industry Federation; Mr Les Sanderson, IMQS and Mr Gerry Farrell, ICF.

In November 2009, the Federation supported the holding of the National Quarry Safety Conference in conjunction with the Health and Safety Authority and the Irish Mining and Quarrying Society. Once again there was a great attendance at this annual event which was held in Athlone to facilitate ease of access for members all over the country. The Federation has already started discussions on the possible holding of a similar event on an All-Ireland basis in 2010. As with all of our events, the ICF would like to thank all of those speakers who made the effort to present highly professional papers at seminars and conferences supported by the Federation throughout the year.

The Transport Committee and the Health and Safety Committee have both put considerable effort in recent times into the development of a Code of Practice for Quarry Delivery Vehicles. In late 2009 this work was completed and was submitted to the Health and Safety Authority for their consideration. This Code of Practice will supplement the Code of Practice which the Federation has developed for Transport Operations in the past and in particular, will address the needs of companies with three or less employees. It is likely that this Code of Practice will be made available for public consultation by the Authority in 2010 before being finally published by the Minister.

The ICF also made a submission on the Code of Practice on Electrical Safety in Quarries. This Code of Practice which was initiated by the Quarry Safety Steering Committee, on which the ICF participate, will address any potential hazards related to electricity on

site. The draft Code of Practice is now with the Health and Safety Authority for publication most likely in 2010. The Federation would like to thank Mr Tony Reville of Kilsaran who chaired the Health and Safety Committee up until the middle of 2009 and his successor, Mr Anthony Moran of Cemex, who took over from Tony as Chair of the Committee. I would also like to thank Eoin Kennedy for his work with the committee throughout 2009. The Health and Safety Committee in 2009 was as follows:

Mr Anthony Moran	Cemex (ROI) Ltd
Mr Adrian Maye	Harrington Concrete and Quarries
Mr Clive Kelly	Whelan Group (Ennis) Ltd
Mr Tony Reville	Kilsaran Group
Mr John McWeeney	CRH Plc
Mr Michael Delaney	Killeshal Precast
Ms Niamh Joyce	Irish Industrial Explosives
Mr Paul O'Mahoney	Roadstone Wood Ltd
Mr Shane Casey	Roadstone Wood Ltd
Mr Vincent Flanagan	B D Flood Ltd

Transport Committee

Obviously the impact of the recession has seen much reduced transport operations within our members throughout 2009. Unfortunately this trend is unlikely to reverse. However the Federation's Transport Committee continues to make representations on the industry's behalf to the regulatory authorities within the State on transport issues. The Federation made a number of submissions to the Road Safety Authority including that supporting the Road Safety Authority's and the Irish Government's position on the revision to the Working Time Directive. We understand that the Irish Government's position will be supported by the European Commission in Brussels before being voted on by the European Parliament in 2010.

The Federation made a submission to the Health and Safety Authority on its discussion document on pressure equipment and systems at work. The Federation had originally intended introducing a voluntary code of practice for the pressure testing of cement tankers and

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the testing of valves and gauges on cement tankers and the Transport Committee had overseen work on this area. However the pending introduction of legislation by the Health and Safety Authority in relation to pressure equipment and systems of work overtook this initiative and the Federation made the output of its work known to the Health and Safety Authority in its submission on the new legislation. We understand that the final legislation will be published in 2010.

In late 2009 the ICF made a submission on the on-line application procedure being proposed by the Road Safety Authority for the issuing of digital tachograph cards. Obviously the smooth and efficient issuing of tachograph cards would greatly benefit the industry and we would encourage the Road Safety Authority to continue the process towards achieving on-line facilities for applications.

In November, the Irish Concrete Federation met with An Garda Síochána in a meeting which now takes place on an annual basis. The purpose of the meeting is to inform An Garda Síochána of any initiatives taken by the Federation and its members in relation to improved transport practice. In addition An Garda Síochána also uses the meeting to inform the Federation of any issues which may be of concern to An Garda Síochána which could impact on our members' activities. The Federation would like to thank An Garda Síochána for the opportunity to meet with them.

The Federation continued to promote the dissemination of its driver's handbook which was launched in 2008, a publication which was targeted at the drivers within the aggregates and concrete industry to enable them to carry out their functions to the highest possible standards. The Federation translated the handbook into Russian and Polish and soft copies of the Russian and Polish versions can be obtained upon request to the Federation.

In November the Federation wrote to the Minister of Transport, Mr Noel Dempsey, TD, in relation to previous submissions made by the Federation to the Department of Transport and consultants on the review of the weight limits for vehicles used in our industry. In 2008, the Federation met with consultants appointed by the Road Safety Authority on this issue. However this issue has not been progressed in the meantime and as a result the Federation would encourage the Department of Transport to take on board the Federation's submissions

in this regard. There is no doubt that increasing weight limits for members' trucks could increase the fuel efficiency and reduce the environmental impact of members' transport operations.

The Transport Committee was chaired by Mr Christy Loughnane of Loughnane Concrete Birr Ltd. The members of the Committee in 2009 were:

Mr Christy Loughnane	Loughnane Concrete (Birr) Ltd
Mr Gary McNally	Cemex (ROI) Ltd
Mr Jim Farren	Roadstone Wood Ltd
Mr Maurice O'Connor	Roadstone Wood Ltd
Mr Peter McTernan	CPI
Mr Richie McDonnell	Roadstone Wood Ltd
Mr David McKeown	Kilsaran Group

Marketing and Promotion

Despite a reduced level of expenditure by the Federation on marketing and promotion, ICF maintained an active programme of work aimed at promoting the benefits of our members' products and, in particular the sustainable benefits of a locally produced material over imported products.

The Irish Concrete Federation fully supports the revision to Building Regulations which has the objective of increasing the energy efficiency of new dwellings. Further amendments to Part L of the Buildings Regulations in 2010 will see a 20% improvement on top of the 40% improvement in energy efficiency introduced by the 2007 revision to the Regulations. The Federation continues to promote A-Rated concrete built homes as the most sustainable method of construction available to homebuilders and will continue to promote the economic, social and environmentally sustainable benefits of concrete. Given the ability of concrete materials to contribute to the highest standards of energy efficiency in buildings, to sound insulation properties, to thermal mass, to fire resistance, to durability and to water resistance, there is no doubt that concrete is the local solution to Ireland's sustainability objectives. In addition the ongoing commitment to reduce embodied CO₂ through the production of CEM II cements, the use of alternative additions such as GGBS and the burning of waste for energy in cement kilns further enhances



concrete's credentials as the sustainable building material of choice.



The ICF continuously reminds all stakeholder groups that the first A-Rated homes in Ireland were concrete built. The Federation continues to present at many seminars and conferences and was particularly pleased to present to the Irish Building Control Institute Conference in March on the merits of concrete built homes.

The continued development of links with other professional organisations involved in the construction industry were enhanced in 2009. ICF, through its Sustainability & Marketing Manager, Mr Liam Smyth, presented to 5 regions of Engineers Ireland, ie the North West Region, Donegal Region, South East Region, Midlands Region and the North East region. The Federation would like to thank Engineers Ireland for including ICF presentations in their programme of lectures. We look forward to working with Engineers Ireland in the future.

The reduction in house building has been particularly prevalent in the larger developments. However there were approximately 6,500 one-off houses commenced in 2009. While this market is substantially short of those levels achieved in the middle of the last decade, the self build market remains a key outlet for our members' products. With this in mind, the Federation supported all of the key Selfbuild shows in Ireland. The Federation participated at Selfbuild Galway in May, Selfbuild Punchestown in September and Selfbuild Cork in November. The Federation strongly believes that communicating directly with people intending to build their own homes in 2010 will be a key factor in influencing people to build sustainable concrete homes in the future.

In 2009, the Federation also exhibited at the Sustainable Building Exhibition, the Energy Show and Plan Expo. The Federation was also particularly pleased to exhibit at the Environmental Protection Agency's annual conference entitled "Environment Ireland".

Zero Carbon Emissions Concrete House



Zero Carbon Emissions House – Ready for Insulation and Render.

The Irish Concrete Federation continues to support the development of Ireland's first ever zero carbon emissions concrete house in Mount Temple, near Moate, Co Westmeath. This exemplar project, which is scheduled for completion in 2010, will clearly show the ability of concrete materials to contribute to the highest forms of sustainability and energy efficiency. The move towards greater energy efficiency in our homes is irreversible and therefore, with this in mind, the Federation made a commitment to the Minister for the Environment, Heritage and Local Government that it would support the development of this unique exemplar project to illustrate the ability of our members' materials to meet these new standards.



The back of the Zero Carbon Emissions House.

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The Federation is particularly thankful to the homebuilder Mr Micheál O'Dowd, whose attention to detail has made the project both rewarding and educational from our industry's perspective. On completion, this project will achieve zero carbon emissions from ongoing primary energy use and will also achieve an A1 Building Energy Rating. This means that there will be a zero carbon footprint from the energy used for space heating, lighting, hot water supply, ventilation and any other motive power used for those aspects. The house will highlight the benefits of air tightness, high thermal mass and good insulation and will display the excellent durability, water resistant properties, sound insulation and fire resistant properties of concrete. There will be extensive use of renewable energy supply on the site to achieve its zero carbon footprint, and the highest standards of workmanship employed to achieve the target U-values for walls, floors and roof.

The ICF, through Sustainability and Marketing Manager Liam Smyth has been providing project management advice to the zero carbon emissions house project and member companies of the ICF have made a significant contribution to the build by supplying readymix concrete, concrete blocks, concrete lintels, concrete flooring, concrete slates, external render, concrete rainwater catchment and foul water treatment systems and cement for on site mixing of mortars.

In late 2009, the Federation commenced stakeholder visits to the project in order that those interested could see the project develop through its construction life span. The Federation will continue to organise visits for interested parties to the project in 2010 and it is hoped that the project will be launched by the Minister for the Environment, Heritage & Local Government following certification. I would like to thank Marcia Weldon for her assistance in the organisation of these visits.

The Federation continued to write articles promoting our members' products and sustainability to trade media throughout 2009. In particular there have been regular features and articles, featuring our industry and its products in construction in trade journals and we look forward to continuing this activity in 2010.



The front of the Zero Carbon Emissions House.

The Federation produced two editions of our industry magazine Concrete Today featuring all of the key attributes of our members' products and exemplar projects throughout Ireland featuring concrete as a key building material. The Federation would like to express its thanks to Mr Brian Murphy, Editor of Concrete Today, for his work with the industry magazine.

In 2009 the Federation revised its A-Rated Concrete Homes brochure, a guide produced by the industry to inform and assist those interested in achieving A-Rated concrete homes to reflect the revision to Part L in 2007/8. It is likely that this popular publication will be continuously revised as building regulations evolve.

The members of the ICF Concrete Development Group in 2009 were:

Mr Alan Hanly	Hanly Group
Mr Andrew Goode	CEMEX (ROI) Ltd
Mr Brendan Lynch	Irish Cement
Mr Richard Bradley	Irish Cement
Mr Diarmuid McCarthy	Roadstone Wood Ltd
Mr Declan Loane	Quinn Group
Mr Declan Butler	BD Flood
Mr Gareth McMeekin	Wright Quarry Products
Mr James Doody	Lagan Cement
Ms Marcia Weldon	ICMA
Mr Sean Corcoran	Corcoran Concrete



Terms and Conditions of Sale Committee

Obviously the recession has had a major impact on the level of output and sales by our members with the ongoing impact on company income. A particularly worrying development has been the huge increase in the level of bad debts being experienced by our industry as a result of the downturn. Currently, very little legislative or regulatory protection exists for material suppliers, such as ICF members, in terms of ensuring payment for product. The Terms and Conditions of Sale Committee in 2009 decided that it would be timely and beneficial for the Committee to produce a Best Practice Guide on Credit Management for dissemination to members. Under the guidance of the Chairman, Mr Peter Gleeson, the Committee developed this Best Practice Guide, a copy of which was disseminated to all members. The Best Practice Guide should be a valuable tool for members in managing their own credit control, credit limits and terms and conditions of sale going forward.

Another item of work for the Committee was the commencement of a process to secure additional legislative security for members in order to protect suppliers from the risk of non payment. The Committee specifically looked at the implications of the Miller Act which exists in the United States which requires all principle contractors to post a payment bond to guarantee payments to all suppliers of labour and materials. The Federation will be actively encouraging Government to introduce a similar measure in Ireland as exists in the US as a protection for suppliers. The Federation is particularly disappointed at the fact that some members have been left unpaid for materials supplied onto projects funded under the Capital Programme of the National Development Plan. It is particularly disappointing that such projects do leave some suppliers facing major bad debts as a result of supplying these projects which can threaten the viability of their businesses. The Federation will make the issue of the introduction of project bonds priority in 2010.

The members of the Committee in 2009 were:

Mr Peter Gleeson	Gleeson Quarries Ltd
Mr Diarmuid McCarthy	Roadstone Wood Ltd
Mr Barry Smith	O'Reilly Concrete Ltd
Mr Ernie Bohan	Roadstone Wood Ltd

Mr Fergus O'Hara	Hanlon Concrete Products Ltd
Mr Frank Bracken	Killeshal Precast Concrete Ltd
Mr James O'Connell	Ducon Concrete Ltd
Mr Joe Doyle	Ardfert Quarry Products Ltd
Mr John McKeogh	Whelan Quarries
Mr Oisin Seale	CEMEX (ROI) Ltd
Mr Jack McElroy	Cassidy Brothers Ltd
Mr Tony Curran	Kilsaran
Ms Onagh Murphy	Loughnane Concrete (Birr) Ltd
Mr P J Kelly	Kellys of Fantane Concrete Ltd
Mr Pat McGrath	McGrath Limestone Works
Mr Paul Dempsey	Lackagh Quarry Group
Mr Paul Murphy	Dan Morrissey (Ireland) Ltd
Mr Peter Claydon	Harrington Concrete and Quarries
Mr Peter O'Shea	CEMEX (ROI) Ltd
Mr Thomas King	Wright Quarry Products Ltd
Mr Tom Gallagher	B D Flood Ltd
Mr Tony O'Sullivan	CPI Ltd

The ICF would like to thank Mr Michael Feighery of Loughnane Concrete (Birr) Ltd who retired from the Committee during the year and was replaced by Ms Onagh Murphy.

Insulating Concrete Formwork Association of Ireland

In 2009 the Insulating Concrete Formwork Association of Ireland was formed with the intention of promoting the benefits of insulating concrete formwork as a construction solution. The Association developed a page on the ICF website and produced a marketing brochure with the intention of promoting ICF solutions.

Communications

The Federation has attempted to increase its recognition and visibility with all members of the ICF in all levels within the industry and to educate all personnel within the industry on key issues impacting on our industry.

CHIEF EXECUTIVE'S REPORT

With this in mind, the Federation developed a new database of approximately 300 contacts within our industry, all of which now receive regular ICF updates. These updates outline the key working agendas of our committees and are clear and visible proof of the broad agenda which the Federation undertakes on behalf of its members.



Attendance at an ICF Seminar.

In addition, the Federation has attempted to bring the work of the Federation to the regions. In 2009 the Federation commenced the holding of regional briefings for its members at which the work of the Federation is brought to our regional members. It is hoped that this initiative in holding regular briefings of members throughout the country will continue in 2010 and into the future.

The Federation continuously updates its website which was developed in 2008 and which acts as a valuable information source for all of those with an interest in our industry.

Management Seminar

As outlined previously, the ICF holds an active programme of events and seminars for its members. In particular, the Federation would like to thank Mr Sean Loughnane of Loughnane Concrete (Birr) Ltd who made a presentation on the challenges facing our industry at the Federation's four regions in March of 2009. The Federation was also happy to welcome Mr Peter Quinn of Peter Quinn Consultancy Services who presented to the Federation following the AGM in June 2009. The Federation held a workshop for members on the new Building Regulations and on the advantages of concrete homes in April while the Federation also held a number of briefings, particularly on Planning and Environment issues arising from the European Court of Justice Decision C215/06 in July 2008.



Mr Peter Quinn of Peter Quinn Consulting Services speaking at an ICF Seminar.

Europe

The Irish Concrete Federation is affiliated to both the UEPG, the European Aggregates Association and ERMCO, the European Readymix Concrete Organisation. Mr Frank Byrne of Roadstone is the representative of the Irish Concrete Federation on the ERMCO Board. Liam Smith, ICF, resigned as Vice-Chair of UEPG Environment Committee and as Chair of UEPG Biodiversity Task Force. Gerry Farrell is now the ICF representative on the UEPG committees. The ICF was happy to nominate Mr Jim O'Brien, formerly of CRH, to the position of President of UEPG in early 2009 and we wish Jim the best in this role. The ICF will continue to support the valuable work of UEPG and ERMCO in furthering the respective interests of the aggregates and concrete manufacturing industry with the key decision makers in Europe, particularly the European Commission and the European Parliament.

Annual Social Weekend

The Annual Social Weekend in 2009 took place in the Slieve Russell hotel from 6th to 8th March with the annual dinner taking place on the evening of 7th March. The ICF would like to thank its hosts in the Slieve Russell hotel for its superb facilities and the hospitality experienced by all of our guests. We would like to thank our sponsors for their continuing support for the social weekend. We would like to congratulate all the golfers who took part in our golf competition and we look forward to welcoming them back to events in the future.



Training



Roadstone Wood employees pictured at presentation of QSCS Certificates.

Throughout 2009 the ICF was involved in the provision and organisation of training, particularly in Health and Safety under the guidance of the Federation's Joe Lynch. The Federation was an approved provider of the QSCS course for part of the year until FAS took over responsibility for the implementation of QSCS. The QSCS Scheme was introduced as part of the Quarry Regulations and we will encourage all members to ensure that they have their plant operators trained in QSCS in order to show compliance with the Regulations. It is hoped that the ICF will continue to engage with FAS and the Health and Safety Authority in relation to the content of training which will obviously need continuing revision and in relation to the further development of new courses.

Quarry Pass Course

In addition to the QSCS training, ICF continued to provide training in Contractor Safety Passport, otherwise known as Quarry Pass. The Quarry Pass course is specifically targeted at contractors who enter our member sites to provide a service to members. We will encourage all members to ensure that all contractors entering on site are in possession of a quarry pass ticket.

Conclusion

It is often said that every year brings changes. However it is fair to say that the changes seen in 2009 in our industry and in related industries were without precedence in normal living memory. The impact of the recession on our industry and indeed on our own organisation has been substantial. This has required substantial restructuring of the Federation and a reduction in running costs to meet the conditions created by the current economic climate. ICF will continue this process

of change to secure its future into the future. Likewise ICF will continue to be at the forefront of our members' efforts in their attempts to adapt to the new realities of the business environment in which they exist.

It was with great sadness that ICF received the news of the untimely death of Mr John Gannon of John Gannon Readymix in late 2009. John and his family have had long standing relationships with the Federation and on behalf of the membership, I would like to express our sincere sympathy to the Gannon family on their loss. May he Rest In Peace.

The success of the Federation in meeting these new challenges will be guaranteed by the continued support from its members. I would like to take this opportunity to thank all members of the Federation for their support in these difficult times. The Council of the Federation and I particularly appreciate the time and effort made by all members of our committees who work tirelessly on our members' behalf. Likewise I would like to thank all of those members who make the necessary effort to attend our briefings, seminars and events.

I would particularly like to thank the outgoing President, Mr Alan Haugh CPI and his replacement Mr Christy Loughnane of Loughnane Concrete Birr for their support throughout the year. I would also like to thank the Vice President, Mr Frank Byrne of Roadstone Wood and all members of the Council who have assisted me and the staff of the Federation throughout the year. I look forward to continuing to work with them throughout 2010.

In particular, I would like to thank the small team in the ICF offices in Newlands Cross. 2009 brought many changes to the organisation and I would like to thank staff for their support and flexibility in meeting the new requirements being placed upon us, particularly given our reduced staffing levels. I would like to compliment the staff's professionalism in ensuring that the ICF continues to remain an organisation of national importance and committed to the provision of a professional service to all it serves.

Gerry Farrell
Chief Executive

Irish Concrete Federation Limited

(A company limited by guarantee, not having a share capital)

Report and Financial Statements

Year Ended 31 December 2009

Independent auditors' report to the members of Irish Concrete Federation

We have audited the financial statements on pages 7 to 15 which have been prepared under the historical cost convention and the accounting policies set out on page 10.

Respective responsibilities of directors and auditors

The directors' responsibilities for preparing the directors' report and the financial statements in accordance with applicable Irish law and the accounting standards issued by the Accounting Standards Board and published by The Institute of Chartered Accountants in Ireland (Generally Accepted Accounting Practice in Ireland) are set out in the Statement of Directors' Responsibilities on page 3.

Our responsibility is to audit the financial statements in accordance with relevant legal and regulatory requirements and International Standards on Auditing (UK and Ireland). This report, including the opinion, has been prepared for and only for the company's members as a body in accordance with Section 193 of the Companies Act, 1990 and for no other purpose. We do not, in giving this opinion, accept or assume responsibility for any other purpose or to any other person to whom this report is shown or into whose hands it may come save where expressly agreed by our prior consent in writing.

We report to you our opinion as to whether the financial statements give a true and fair view and are properly prepared in accordance with Irish statute comprising the Companies Acts, 1963 to 2009. We state whether we have obtained all the information and explanations we consider necessary for the purposes of our audit, and whether the financial statements are in agreement with the books of account. We also report to you our opinion as to:

- whether the company has kept proper books of account; and
- whether the directors' report is consistent with the financial statements.

We also report to you if, in our opinion, any information specified by law regarding directors' remuneration and directors' transactions is not disclosed and, where practicable, include such information in our report.

We read the directors' report and consider the implications for our report if we become aware of any apparent misstatements within it.

Basis of audit opinion

We conducted our audit in accordance with International Standards on Auditing (UK and Ireland) issued by the Auditing Practices Board. An audit includes examination, on a test basis, of evidence relevant to the amounts and disclosures in the financial statements. It also includes an assessment of the significant estimates and judgments made by the directors in the preparation of the financial statements, and of whether the accounting policies are appropriate to the company's circumstances, consistently applied and adequately disclosed.

We planned and performed our audit so as to obtain all the information and explanations which we considered necessary in order to provide us with sufficient evidence to give reasonable assurance that the financial statements are free from material misstatement, whether caused by fraud or other irregularity or error. In forming our opinion we also evaluated the overall adequacy of the presentation of information in the financial statements.

Opinion

In our opinion the financial statements:

- give a true and fair view, of the state of the company's affairs as at 31 December 2009 and of its results and cash flows for the year then ended; and
- have been properly prepared in accordance with the Companies Acts, 1963 to 2009.

We have obtained all the information and explanations which we consider necessary for the purposes of our audit. In our opinion proper books of account have been kept by the company. The financial statements are in agreement with the books of account.

In our opinion the information given in the directors' report on pages 3 to 4 is consistent with the financial statements.

PricewaterhouseCoopers

Chartered Accountants and Registered Auditors

Dublin

15 June 2010

Income & Expenditure Account

Year Ended 31 December 2009

	2009 €	2008 €
Income	672,542	1,576,249
Expenditure	<u>(1,046,908)</u>	<u>(1,528,177)</u>
Operating surplus	(374,366)	48,072
Interest receivable	26,080	21,641
Bank interest and charges	<u>(680)</u>	<u>(673)</u>
Surplus for year before taxation	(348,966)	69,040
Taxation	<u>(8,520)</u>	<u>(7,744)</u>
Surplus for the year after taxation	<u>(357,486)</u>	<u>61,296</u>

Statement of Movement in Accumulated Reserves

Year Ended 31 December 2009

	2009 €	2008 €
At 1 January 2009	837,945	776,649
Surplus for year	<u>(357,486)</u>	<u>61,296</u>
At 31 December 2009	<u>480,459</u>	<u>837,945</u>

All of the company's activities are classed as continuing. The company has no recognised gains and losses other than those included in the surplus above and therefore no separate statement of total recognised gains and losses has been presented.

There is no difference between the surplus above before taxation and the surplus for the year as stated above and their historical cost equivalents.

Balance Sheet

31 December 2009

	2009 €	2008 €
Fixed assets		
Tangible assets	<u>48,685</u>	<u>60,797</u>
Current assets		
Debtors and prepayments	350,765	671,268
Cash at bank	<u>547,659</u>	<u>500,878</u>
	898,424	1,172,146
Creditors: Amounts falling due within one year	<u>(367,230)</u>	<u>(295,578)</u>
Net current assets	<u>531,194</u>	<u>876,568</u>
Net assets	<u>579,879</u>	<u>937,365</u>
Financed by		
Contributions to capital set-up costs	99,420	99,420
Reserves	<u>480,459</u>	<u>837,945</u>
	<u>579,879</u>	<u>937,365</u>

IRISH CONCRETE FEDERATION KEY OBJECTIVES

Irish Concrete Federation Key Objectives

The key objectives as contained in the Constitution and in the Memorandum and Articles of Association of the Irish Concrete Federation are as follows:

- (a) To represent its members individually and collectively.
- (b) To maintain contacts with relevant Government Departments, Semi-State, Professional and Trade organisations so as to ensure that the interests of members are promoted to the greatest possible extent.
- (c) To disseminate amongst its members information on issues and developments which affect them.
- (d) To act as spokesperson for its members and the Industry.
- (e) To develop and maintain contacts with the media to ensure that the public are accurately informed about the activities of the Federation.
- (f) To co-operate, assist, act in conjunction with, amalgamate or affiliate with, or subscribe to any association, federation, institution or other organisation upon such terms and conditions as may from time to time be agreed upon by the Federation or its Council.
- (g) To obtain from Government Departments, Local Authorities, Public Bodies, Consultants, Building Contractors, Civil Engineering Contractors and Merchants' Associations and all other bodies and persons fair and equitable treatment for members in relation to conditions of sale, bills of quantities, conditions of contract, specifications, supply of materials or any other matter, and to protect the interests of members in respect of any such matters.
- (h) To examine all proposed legislation or Ministerial Orders or EU Law or Measures which may affect or tend to affect the Commercial Interest of the Concrete Products Industry, and if considered necessary or advisable to take steps to support or oppose the same.
- (i) To raise and maintain a Common Fund and/or such General or Special Reserve Fund or Funds as may from time to time be decided to be applied and used in carrying out the objects of the Federation and if necessary to borrow money with or without security and to charge or mortgage the property of the Federation to secure repayment of the same.
- (j) To provide advice and assistance to members in Insurance, Economic, Quality, Technical, Health & Safety, Planning & Environmental Affairs.
- (k) To do all such things as are incidental or conducive to the attainment of the above mentioned objects or any of them.



Irish Concrete Federation Publications



Concrete Today (May 2010)

Concrete Today is the Irish Concrete Federation magazine.



Geological Heritage Guidelines for the Extractive Industry

Guidelines for ICF members on Geological Heritage.



ICF Drivers Handbook

Drivers Handbook published by ICF Transport Committee.



Concrete Products Directory

A nationwide database of Irish concrete product producers.



Comprehensive Fire Protection and Safety with Concrete

How concrete can be used to provide comprehensive fire protection.



Concrete and Energy Efficient Buildings

How concrete can be used to provide energy efficient buildings.



The A-Rated Energy Efficient Concrete Home

How to build an A-Rated energy efficient concrete home.

Thermal Mass and Sustainable Building

The use of the thermal mass of concrete structures to enhance thermal performance and occupant comfort.

Precast Concrete Frames Guide

Introduction to precast concrete frames.

Precast Concrete Ideas, Products and Solutions

A profile of the Irish Precast Concrete Association members.

The ICF Environmental Code

ICF members' Environmental Code of Practice.

Code of Practice for Transport Operations

Guidance document for concrete industry transport operators, owners and drivers.

Archeological Code of Practice

Code of Practice for ICF members on archaeology.

The New Concrete Standards - Introduction to IS EN206

Introduction to the Irish Standard for Concrete.

Fire Safe Concrete

Outlines the many advantages of masonry/concrete house construction.

Building Concrete Homes

Outlines the benefits of owning and building a concrete home.





Irish Concrete Federation Council Members 2009

Mr Christy Loughnane (President)
Loughnane Concrete (Birr) Ltd
Woodlands, Birr
Co Offaly

Mr John Joe McGrath
McGrath's Limestone Works Ltd
Cregaree Quarries
Cong
Co Mayo

Mr Mark Guinan
Cemex (ROI) Ltd
Block 6
Central Business Park
Clonminch, Tullamore
Co Offaly

Mr Alan Haugh
CPI Ltd
Lucan
Co Dublin

Mr Peter Gleeson
Gleeson Quarries Ltd
Laffansbridge, Thurles,
Co Tipperary

Mr Frank Byrne (Vice-President)
Roadstone Wood Ltd
Fortunestown
Tallaght
Dublin 24

Mr Finbarr O'Neill
Finbarr O'Neill Ltd
Poulavone, Ballincollig
Co Cork

Mr Barry O'Reilly
O'Reilly Brothers Ltd
Kingscourt
Co Cavan

CHIEF EXECUTIVE

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Irish Concrete Federation
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COMPANY SECRETARY

Mr John Maguire
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