



Irish Concrete Federation

Annual Report 2014



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.

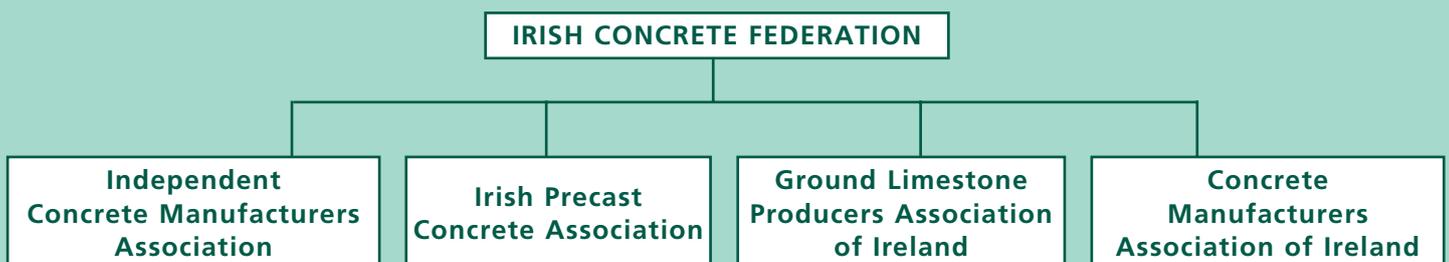
We seek to develop successful and mutually beneficial relationships with customers, suppliers, communities and the construction industry.

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 Aggregates Association.
The Irish Precast Concrete Association is a member of BIBM, the European Federation for Precast Concrete

ERMCO

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



(Union Européenne des Producteurs de Granulats)



European Federation for Precast Concrete

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Cover Photo: Rosie Hackett Bridge Dublin, Irish Concrete Society Awards Overall Winner 2015. Supplier Cemex

Image Courtesy of Roughan & O'Donovan Consulting Engineers & Sean Harrington Architects



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Foreword by the President, Mr David Wright

Once again it gives me great pleasure to present to you the Annual Report of the Irish Concrete Federation. I sincerely hope that you find this annual publication interesting and that it gives the reader a flavour of the breadth of activities in which the federation is involved to further the interests of our industry members. Many of the issues which arose in previous years continued to be addressed in 2014, all of which required continuous involvement from the federation's executive and members.

2 There is little doubt that 2014 saw further recovery in the economic fortunes of our country. The return to economic growth and more importantly, the generation of increased employment are very welcome and offer substantial hope for the years to come. It can finally be said that the economy and indeed our industry has probably overcome the worst of the economic downturn, notwithstanding the fact that imbalances on the road to recovery remain. In 2014, the market for our members' products remains mixed. Similar to the previous year, 2014 saw further increases in activity in the Dublin area. Unfortunately this has not been replicated in the rural economy. In fact it is probably fair to say that the divide between the economic fortunes of the Dublin region and the rest of the country intensified throughout 2014, a fact that our Government is going to have to get to grips with in the near future. National economic data and statistics often hide the regional variances which exist even within a country as small as ours. Our sector is not alone in experiencing the effects of a two tier economy, and we strongly urge Government to ensure that the benefits of recovery reach the regions rather than being solely confined to within the environs of our capital city.

Notwithstanding developments in the marketplace, the ICF remained an extremely busy organisation in 2014 and yet again delivered positive results for our members. I would like at this stage to acknowledge the work of my colleagues on the ICF Council and indeed on the committees within the federation.



Our organisation has changed substantially in recent years and with much less resources, has continued to punch above its weight in influencing decisions which impact on the operating environment of our members. This is achieved through the voluntary involvement of many people on our various committees and their presence and support at the many ICF events held throughout the year.

Once again, the key driver for the policy agenda was the committee structure within ICF. Our planning and environment committee monitored developments related to Section 261A of the Planning and Development Act 2000. This committee continues to highlight the need for greater regulatory certainty for our members operating throughout the country as well as educating and informing our members on the ever changing environmental policy framework in which our members operate.

Our business development committee will continue to seek greater regulatory protection for suppliers of materials in the marketplace. ICF was disappointed at the exclusion of many suppliers from the remit of the Construction Contracts Act and at the lack of

protection available to suppliers like our members whose products cannot be retrieved in the event of non-payment. ICF will continue to promote best practice in credit management among members in order to protect individual businesses from bad debt.

In March our transport committee held a hugely successful seminar for members in association with the Road Safety Authority and An Garda Siochana. I know that plans are already underway for a similar Driving for Work seminar to be held in association with both of the aforementioned authorities and the Health and Safety Authority in 2015. I am also aware that ICF remains highly involved in the development of legislation governing the maximum weight limits for our vehicles, some of which remain outdated given the improvements in vehicles and technology in recent years.

Our health and safety committee continues to promote a culture of safety to members through various channels. I am particularly grateful to the Health and Safety Authority who continuously support ICF in this work. In particular I would like to thank the authority for presenting at regional safety briefings which we held throughout the country in the early summer. It is important that our members remember the key role that safety must play in the operations of their businesses on a daily basis and ICF will continue in its effort to raise standards in health and safety in the coming year.

Once again, the members of our technical committee did invaluable work for our industry through participation on the various expert panels and committees within the NSAI, whose function it is to develop standards and guidance on standards for products produced by our members. It is imperative that the outcomes of the deliberations of the various expert groups within NSAI must be communicated to all of the stakeholders in the marketplace. ICF looks forward to working with other stakeholder organisations, with whom we

have excellent relationships in order to achieve this objective in 2015.

At our final Council meeting of the year, the ICF agreed to re-commence the promotion and marketing of the products produced by our members. Given the likelihood of more positive times ahead, we need to ensure that our materials remain to the forefront of developments in construction in the coming years. We look forward to working with Cement Manufacturers Ireland and other stakeholder groups in order to achieve this objective.

Finally, I would like to pay tribute to our small staff in the Irish Concrete Federation head office in Newlands Cross. There is no doubt that with the continued involvement of members, supported by the professional representational service provided from the ICF staff, our industry will continue to see the benefits of improving economic conditions and continued involvement with our industry organisation. I sincerely hope that you enjoy reading our Annual Report.



Mr David Wright
President.

Chief Executive's Report

2014 was a year of renewed optimism within the concrete products sector and among ICF members generally. General economic recovery seemed to gain further momentum as the year progressed.

This recovery was driven largely by strong economic growth, which in turn was primarily driven by an exceptional performance by Irish exporters and a slow but sustainable recovery in consumer spending. The key barometer of employment also pointed towards recovery as jobs were created, particularly in businesses linked to exports and in high tech sectors such as ICT and the pharmaceutical industry.

4 With the general increase in economic activity, there was renewed growth in construction throughout the year, building on the progress seen in the latter half of 2013. While admittedly coming from an extremely low base, it was promising to see increased volumes of concrete being demanded in the market place, driven to a large extent by investment in industrial and commercial infrastructure and agriculture in rural areas.

To reverse the well-known cliché – *'every silver lining has a cloud'* a statement that could be applied to the nature of the recovery which has occurred to date in construction. As the year progressed, it became abundantly clear that recovery in construction activity in Ireland, while not unexpectedly lagging general economic recovery, was largely confined to the greater Dublin area. It has always been accepted that recovery in construction would lag general economic performance and that initially, any growth would be confined largely to urban areas. However the disparity in economic activity between Dublin and rural Ireland has proven to be more pronounced than could ever have been anticipated. It remains a source of constant frustration among ICF members that the real facts with regard to activity outside of the Dublin area are generally largely masked within general economic statistics and indicators.

Notwithstanding the uneven nature of Ireland's recovery, the overall indications heading into 2015 are that there will be further slow recovery throughout the year but that the recovery will be sporadic and urban based with the activity levels of our individual members in rural



ICF Chief Executive, Gerry Farrell.

areas largely dependent on proximity to specific local projects and the ability of the farming community to invest in facilities. While much economic commentary is directed at the housing shortage in Dublin, there remains little indication that there will be a substantial increase in house building in 2015. Commencement notices lodged in 2014 clearly show that while there is some increase in house building activity in Dublin, it is not anything close to what is required to address the housing shortage which has emerged in our capital city. New housing activity in rural Ireland will remain at a low level as demand for new units remain subdued. Indeed, it is scarcely believable that Ireland has come from a situation where there were reportedly almost 300,000 empty units across the country in the recent past to the current scenario where a severe housing shortage exists in Dublin. Clearly a national housing policy has to eventually get to grips with the real drivers behind supply and demand for housing in order to avoid the current massive variances in supply and demand patterns and the resulting consequences of which we are all too familiar.

Investment in infrastructure by Government remains below what has been identified by all key stakeholders as what is necessary to sustain future economic growth. In many developed societies, spending on infrastructure increases in times of economic stagnation in order to support activity and prepare for recovery. However in Ireland it remains the fact

that spending on infrastructure generally occurs at times when economic growth is already strong with obvious consequences for capacity and economic value for money. Investment in energy, transport and educational infrastructure remains absolutely fundamental to sustainable recovery and Ireland's future economic, social and environmental welfare.

The agricultural sector remains the most fundamental driver of the rural economy and is key to ICF members' businesses across the country. With the abolition of dairy quotas due in early 2015, our members are hopeful that the full potential of Ireland's dairy farmers can be realised with the obvious benefits for on-farm investment in facilities. While concerns have been raised at the possibility for a potentially negative outlook for price levels for dairy products, there is little doubt that Ireland's dairy industry is ideally placed to benefit from world market demand increases for dairy products and hence short-term cyclical price fluctuations will hopefully not act as a disincentive for farmers to invest in their facilities for their future.

While ICF's ability to influence Ireland's macroeconomic performance is limited, the federation's activity to further members' interests continued unabated throughout 2014. ICF and its members continued to proactively engage with each other and with other stakeholders in order to influence the operating environment of the industry. This work was facilitated through the voluntary involvement of companies the length and breadth of the country who partake in ICF activities on a daily and weekly basis. The following report highlights just a sample of the work and output of the organisation which continues to exist on tight resources but consistently delivers effectively for its members.

The ICF Council

The ICF continues to be governed by its Council which oversees the work of the executive and the committees within the federation. Our Council is made up of leaders within the industry, elected by members to represent them at the highest level within the organisation.

The members of the ICF Council in 2014 were as follows:

Mr David Wright	Wright Quarry Products, President
Mr Peter Gleeson	Gleeson Quarries, Vice-President
Ms Caroline Quinn	Concast Precast Group

Mr Larry Byrne	Roadstone
Mr John Farragher	Concrete Manufacturing Company
Mr Brian Kelly	Cemex
Mr Christy Loughnane	Loughnane Concrete (Birr)
Mr John Joe McGrath	McGraths Limestone Works
Mr Derry McKeown	Kilsaran International
Mr Finbarr O'Neill	Finbarr O'Neill

The ICF Council continuously reviews the ongoing operation and finances of the ICF and monitors all of the activities of the five committees within the ICF's structure. There is no doubt that the active and willing involvement of the ICF Council ensures that activities of the federation reflect closely the needs and requirements of its members. In 2014, the Chairman of the Council and ICF President was Mr David Wright of Wright Quarry Products in County Monaghan. In June 2014 Mr Brian Kelly of Cemex stepped down as a member of the Council.

One of the key decisions taken by the ICF Council in 2014 was the re-establishment of the Concrete Development Group with the support of Cement Manufacturers Ireland. This group will be charged with once again addressing the key marketing and promotion challenges for sustainable concrete and aggregates in the Irish construction sector. It was an unfortunate consequence of the economic crash that ICF was not in a position to continue to invest the level of resources required in the promotion of the industry's products. However, given the return to sustainability of ICF finances under the guidance of the ICF Council, the industry is thankfully in a position where it can now once again start to promote the use of concrete and aggregates in Ireland's built infrastructure. ICF looks forward to the establishment of the new committee early in 2015 which will develop a communications plan for the sector going forward.

Another key decision of the ICF Council in 2014 was to review, in partnership with the Quarry Products Association of Northern Ireland, the "Report on a Competitive Analysis of the Construction Materials Sector in Ireland" which was completed in 2012. This review of the vision and strengths and weaknesses of the sector will be supported by InterTradelreland and we look forward to the report being published next year. The Council also sanctioned the completion of the first ICF salary survey for years in which 32 companies participated.

National Film School

Irish Concrete Society Awards Building Category Winner 2015

Supplier Kilsaran International

Image Courtesy of ABK Architects



Throughout the year, ICF Council representatives maintained and developed links with other stakeholder organisations, particularly in order to promote knowledge and compliance with product standards in the marketplace. In 2013, ICF held a major seminar for its members on the introduction of CE marking. In March 2014, ICF Council members met with representatives of the Royal Institute of Architects of Ireland, Society of Chartered Surveyors Ireland, Engineers Ireland and the Association of Consulting Engineers in Ireland and the Construction Industry Federation on a number of occasions on issues directly or indirectly related to standards within our industry. There is little doubt that compliance with CE marking and with relevant harmonised product standards in the construction industry in general needs improvement, notwithstanding the fact that CE marking is a legal requirement since July 2013. It is

against this background and taking into account the enactment of updated building control regulations which entered into force in February, that ICF developed its certification and traceability initiative through its technical and business development committees. Emanating from discussions at these two committees, it became clear that the certification requirements which had existed in the past for concrete being supplied to grant-assisted farm infrastructure projects should be replicated for all construction materials supplied by our members to all construction projects. Similarly, in line with many other sectors, the need for traceability has emerged as being a key requirement for supply chain integrity for the future. Taking all of these factors into account, ICF intends to launch its new initiative in 2015 with the assistance of the Minister for the Environment, Community and Local Government.

Transport Committee

The chairman of the ICF's transport committee is Mr Christy Loughnane of Loughnane Concrete in Birr and members of the committee are as follows:

Mr Christy Loughnane	Loughnane Concrete (Birr)
Mr Conan Curley	Killeshal Precast Concrete
Mr Denis Doyle	Doyle Concrete
Mr John Curran	Lagan Concrete
Mr Eoin O'Carroll	Bennettsbridge Limestone
Mr Neil McConomy	Roadstone
Mr T J Lennon	Lennon Quarries
Mr Roy Hegarty	Kilsaran International
Mr Michael Keohane	Keohane Readymix
Mr Michael Gleeson	Gleeson Concrete
Mr Tim Flood	B D Flood

The transport committee which was reformed in late 2013 had an extremely successful year in 2014. Under the guidance of the chairman, the committee organised a very successful transport seminar on 19th March which was held with the support of the Road Safety Authority (RSA) and An Garda Síochána. Presentations focussed on road safety and the Commercial Vehicle Roadworthiness programme for which the RSA has responsibility. Presentations by ICF members on the diesel rebate scheme and the implementation of a transport management system were also greatly received by the large attendance. The committee met with the Road Safety Authority Chief Executive Officer, Moyagh Murdock and her staff on two occasions throughout the year on a large range of issues including truck weights, driving for work policies, the use of tachographs and the content of CPC training. The agenda for the committee will remain very busy in 2015 as it has already been decided that a Driving for Work seminar will be held during the year.

The transport committee has also been charged with the responsibility of highlighting to members the ever increasing cost of transport operations. It has become apparent that our members are no longer simply quarry or concrete companies, they are transport companies also. In addition, ICF looks forward to clarifying the weight limits that will apply to five-axle rigid trucks which appeared on the market place during the year. This welcome development

will hopefully substantially improve the cost competitiveness of our members, while also reducing the environmental impact of transport operations. However, further clarification and legislation will be required in this area and ICF looks forward to working with vehicle suppliers, the Road Safety Authority, the National Roads Authority and the Department of Transport in this regard.

Business Development Committee

In 2014 the federation's business development committee was chaired by Mr John O'Carroll of Ardfert Quarry Products and the members of the committee were as follows:

Mr John O'Carroll	Ardfert Quarry Products
Mr Peter Gleeson	Gleeson Quarries
Mr Ernie Bohan	Roadstone
Mr Fergus O'Hara	Hanlon Concrete Products
Mr Frank Bracken	Killeshal Precast Concrete
Mr James O'Connell	Ducon Concrete
Mr Joe Doyle	Ardfert Quarry Products
Ms Onagh Murphy	Loughnane Concrete (Birr)
Mr Tony Curran	Kilsaran International
Mr Pat McGrath	McGraths Limestone Works
Mr Paul Murphy	Dan Morrissey (Ireland)
Mr Oisín Seale	Cemex
Mr Bernard Quinn	Concast Precast Group
Mr John Curran	Lagan Concrete
Mr Pat Freeman	McGrath Quarries
Mr Thomas King	Wright Quarry Products
Mr Tom Gallagher	B D Flood

The business development committee was largely concerned with the development of the ICF traceability/certification initiative to which I have already referred in this report. The committee was responsible for the design of the final certificate which was presented to the construction and professional representative organisations at a briefing held in March. In designing the certificate, the committee used the experience of the use of the certificate required by the Department of Agriculture for the supply of concrete to grant aided farm buildings.

The business development committee also organised the holding of a trial credit forum in association with Experian Ireland. The trial credit forum, which is subject to competition and data protection legislation and was independently chaired, had the objective of reducing the levels of bad debt in the sector which has severely impacted on ICF members in the recent past. It is hoped that the trial credit forum can be used as a template for future credit forums to be held throughout 2015 by ICF. In this regard ICF has engaged with the Irish Institute of Credit Management on this issue in order to further educate our members on best practice in credit management and the tools and techniques in securing payment in order to protect members in the future.

The business development committee also continued to monitor the availability of credit insurance in the market place and will continue to monitor its likely increased availability throughout 2015. The committee also analysed and reported to ICF members on the implications of court decisions governing retention of title, particularly highlighting the fact that suppliers of construction materials have little or no protection under retention of title clauses.

Health and Safety Committee

During 2014 Mr Anthony Moran of Cemex resigned as Chairman of the ICF health and safety committee. Mr Moran was replaced by Mr Paul O'Mahony of Roadstone. The members of the ICF health and safety committee were as follows:

Mr Paul O'Mahony	Roadstone
Mr Adrian Maye	Harrington Concrete and Quarries
Mr John McWeeney	CRH
Mr Anthony Moran	Cemex
Mr Tony Reville	Kilsaran International
Mr Vincent Flanagan	B D Flood
Mr Jody Guilfoyle	Lagan Group
Mr John McNamara	Lagan Group
Mr Clive Kelly	McGrath Quarries
Mr Con Keigher	Irish Industrial Explosives

Throughout the year the ICF's health and safety committee remained extremely busy highlighting safety concerns and educating members on the dangers which exist on a daily basis within our industry. In addition, the committee represented the sector on

advisory committees of the Health and Safety Authority (HSA) and FAS / Solas. The federation, with the assistance of the HSA, ran workshops in May and June at regional locations throughout the country at which safety bulletins were disseminated and key safety issues were addressed by members of the committee. ICF would like to express its gratitude to Mr Pat Griffin of the Health and Safety Authority who presented at each of the workshops.

The health and safety committee also produced a safety bulletin on confined spaces and a new incident alert for members in the quarrying, concrete and precast concrete industry. The committee also made two submissions to the Health and Safety Authority on proposed revisions to the Safety, Health and Welfare at Work (Quarries) Regulations. Indeed, some of the positions of the ICF in the areas of the definition of a quarry, the issuing of temporary cessation notices and the need for daily record sheets have been taken on board by the authority. The federation was disappointed however at the decision by the authority not to include driller training as a core module within the regulations.

The health and safety committee are also represented on the FAS Quarry Safety Certification Scheme (QSCS) steering group and ICF made representations and submissions on both the procedure for the renewal of existing QSCS tickets and the crossover arrangements which exist between CSCS and QSCS tickets. The committee also monitored developments on the Industry Marking and Tracking (Track and Trace) of Explosives Regulations which will enter into force on 5th April 2015. In addition the committee coordinated the response from 53 locations as part of the NEPSI reporting requirements included within the Social Dialogue Agreement on Respirable Crystalline Silica.

The committee also participated actively in the organisation of the All Ireland Quarry Safety Conference which was held on 19th November in Dublin. This highly successful conference is held on a biennial basis with the support of the HSA and the Health and Safety Executive of Northern Ireland (HSENI) and other stakeholder organisations.

In December, the committee invited the HSENI and the Quarry Products Association (Northern Ireland) to make a presentation to the committee and to members of the Irish Precast Concrete Association health and safety committee on the pre-stressing initiative in Northern Ireland. At the same workshop, members of both

committees were presented to by Gill Group Training School on the issue of load security which is of critical importance to the industry. It has been decided that a trial training course on this critical issue will be run for both committees in 2015 with a view to increasing knowledge on load security in the sector.

Planning and Environment Committee

In 2014 Mr Sean Loughnane resigned as chairman of the committee and he was replaced by Mr Fergus Gallagher of Kilsaran International. The committee expressed thanks to Sean for his stewardship of the committee for many years. The members of the committee were as follows:

Mr Fergus Gallagher	Kilsaran International
Ms Naomi Cooper	CRH
Mr Sean Loughnane	Loughnane Concrete (Birr)
Mr Stephen Linden	Quinn Building Products
Mr Keith McGrath	McGraths Limestone Works
Mr Brian Downes	Cemex
Mr Ronan Griffin	Roadstone
Mr Vincent Flanagan	BD Flood
Mr Mark Galvin	Ardfert Quarry Products
Ms Amanda Tarpey	Harrington Concrete and Quarries
Mr John Quirke	M F Quirke & Sons
Mr Maurice Carey	M F Quirke & Sons

During the year the planning and environment committee was once again largely consumed with the implications of decisions made by local authorities and An Bord Pleanala arising from Section 261A of the Planning and Development Act 2000. Great concern was expressed by individual members in relation to the pace of the decisions emanating from this process and the lack of certainty with regard to its eventual outcome. Indeed the key concern for many members was the delays in the process and the practical implications of these delays for operations on the ground. ICF lobbied the Minister for the Environment, Community and Local Government for the enactment of legislation to facilitate concurrent applications to An Bord Pleanala for future development and substitute consent in order to shorten the duration of the entire process and to facilitate continued activity. ICF is disappointed that, as of year-end and despite the threat to the ongoing operation of businesses, this legislation



Mount Anville Outdoor Learning Facility

Irish Concrete Society Awards Elemental Category Winner 2015

Supplier Banagher Precast Concrete

Image Courtesy of Banagher Precast Concrete

has not yet been forthcoming. The ICF will continue to lobby hard on our members' behalf to ensure that no members are forced into temporary cessation of their activities due to procedural delays and will continue to press for the introduction of the required legislation in the New Year.

ICF also monitored decisions by local authorities, An Bord Pleanala and indeed the courts related to the planning status of members' quarries, particularly those quarries with pre-1964 entitlements. Quarry operations are strategically important businesses and should operate in an environment of regulatory certainty into the future. It is not sustainable that authorised quarries can remain open to challenge, threatening their future and ICF will continue to advise all members on both an individual and collective basis, on the best options available to them on achieving regulatory certainty. In addition ICF members continue to raise concerns on the continued lack of enforcement against unauthorised quarry operators. There is clearly a lack of interest among the industry's customers on the planning status of individual sources of quarry materials. However the responsibility for enforcing unauthorised operations must reside with local authorities. It is clearly unacceptable that in times of depressed demand, commercial advantage is given to unauthorised operators over authorised operators who have higher compliance costs.

In November ICF, with the assistance of its members operating in County Tipperary, made submissions to Tipperary County Council on the proposed development contribution plan for the county.

The submissions were favourably received by the council and the proposed contributions contained in the draft plan were substantially reduced when the final plan was agreed.

During the year the committee identified the need to develop guidance for members in the area of hydrology, particularly in relation to concerns over emission limit values being applied on the renewal of discharge licences. It is planned to hold a workshop for members early in the New Year on this particular issue.

Through the ICF Project Archaeologist, Dr Charles Mount, the federation continued to engage with the National Monuments Service on a regular basis, particularly to highlight on a continuous basis the benefits of the ICF Archaeological Code of Practice. There is little doubt that the practical benefits of the Code of Practice need to be continuously reinforced among stakeholder groups and industry.

Technical Committee

In 2014 the technical committee was chaired by Mr Peter Deegan of Banagher Precast Concrete. Members of the technical committee were as follows:

Mr Peter Deegan	Banagher Precast Concrete
Mr William Farrell	Killeshal Precast Concrete
Mr Tom Holden	Roadstone
Mr Donal Crowley	Roadstone
Mr Diarmuid McCarthy	Roadstone
Mr Luke Curran	Lagan Concrete
Mr Richard Bradley	Irish Cement
Mr Peter Seymour	Ecocem
Mr Joe Rice	Cemex
Mr Kevin Maguire	Quinn Group
Mr Gareth McMeekin	Wright Quarry Products
Mr Vincent Anderson	Kilsaran International
Mr Darragh McKenna	O'Reilly Bros
Mr David Cassidy	Cassidy Bros
Mr Brendan Lynch	Consultant

The technical committee's work agenda remained to the forefront of ICF priorities throughout 2014. Developments in the industry and in the regulatory

environment in recent years have led to the need to review the content of existing product standards and their guidance and, even more importantly, communicate knowledge of the standards to other industry stakeholders. Members of the ICF technical committee are active participants on the various committees within the National Standards Authority of Ireland (NSAI), whose responsibility it is to develop and oversee product standards. The revised guidance on aggregates for use under concrete floors and footpaths (S.R.21) was published in March. However, it is likely that, notwithstanding this achievement by industry stakeholders, the Department of the Environment, Community & Local Government and the Authority, the guidance may have to be reviewed again in 2015.

The committee was involved in the development of the "Code of Practice for the Procurement and Use of Unbound Granular Fill (hardcore) for use under Concrete Floors and Footpaths". This code of practice, which outlines the responsibilities of various stakeholders with regard to the ordering and traceability of hardcore in the supply chain, went for public consultation in November and ICF made a further submission on the code at this stage.

ICF technical committee members were also involved in the preparation of a submission to the NSAI on the revision of the National Annex of the Irish Concrete Standard, I.S. EN 206. It was likely that the revised National Annex will be published in 2015 and will outline changes to minimum cement and maximum water cement ratios. The members of the committee will also participate in the likely reviews of S.R. 16 and S.R. 18 which are the respective guidance on the standards for aggregates for concrete and aggregates for mortar.

While the development of standards and guidance is obviously of key importance to the committee, it has become apparent that there is a knowledge deficit in the construction industry generally on the content of these standards and their related guidance. It is intended that ICF, with the assistance of technical expertise within the industry, will run educational workshops for members and for other stakeholder groups in 2015, possibly in partnership with other organisations in the industry. It is unacceptable that the existence of these standards and indeed CE marking requirements can sometimes be largely ignored in specifying and procuring construction products.

The technical committee also produced guidance for members for dealing with queries related to concerns

on the integrity of products arising from negative publicity associated with concrete blocks in the greater Dublin area. The kernel of the ICF's position on this issue is to support the relevant standards and their guidance on the basis that products that are manufactured in compliance with the standards and used correctly in the construction of buildings designed and built in accordance with national building regulations, have an excellent history of use in the country. The continued development of these standards and their communication will remain a key priority for the committee in 2015.

Irish Precast Concrete Association

There were nine member companies of the Irish Precast Concrete Association (IPCA) in 2014. The Chairman of the IPCA is Mr Frank Healy of Ducon Concrete and the members of the Council were as follows:

Mr Frank Healy	Ducon Concrete
Ms Caroline Quinn	Concast Precast Group
Mr David Wright	Wright Quarry Products
Mr Barry O'Reilly	O'Reilly Bros
Mr Brendan Mahon	Banagher Precast Concrete
Mr Chris O'Dea	Techrete
Mr Marcus Sweeney	Techrete
Mr Derek Duffy	Oran Precast
Mr Frank Bracken	Killeshal Precast
Mr John O'Connor	Flood Precast

It is clear that one of the shining lights of the entire concrete industry in recent years has been the ability of the precast concrete industry to expand their markets into the UK since the advent of the economic crash in Ireland. Enterprise Ireland point to the fact that exports of precast concrete from Irish manufacturers grew from €0 in 2006 to approximately €130 million in 2014. IPCA meets with Enterprise Ireland on an ongoing basis to review the industry's performance in export markets and to discuss the range of supports available from Government to assist members achieve greater penetration of overseas markets.

On the domestic front, the IPCA met with a delegation from the Department of Education in order to promote adherence to CE marking requirements by all manufacturers supplying products to schools in the Republic of Ireland. Essentially IPCA requested the



Rosie Hackett Bridge Dublin

Irish Concrete Society Awards Overall Winner 2015

Supplier Cemex

Image Courtesy of Roughan & O'Donovan Consulting Engineers & Sean Harrington Architects

development of an approved supplier list, similar to that which applies for I.S. EN 206 concrete with the Department of Agriculture. It is the IPCA's strong belief that only suppliers that have the necessary CE marking in place should be entitled to supply publicly and privately funded projects, especially given the fact that CE marking for all products with a harmonised standard is mandatory since July 1st 2013. In addition, a sub-committee of the association engaged on a number of occasions with the Department of Agriculture and Food on the development of a procedure for the inclusion of companies on the Department's approved list of slat manufacturers. In essence the procedures involved the introduction of requirements for CE marking and load testing of farm slats. The procedure was completed in advance of the opening of the Farm Safety Scheme which will grant aid the replacement of old slats on farms and should boost the demand for slats in the first half of 2015.

In 2014 the association's health and safety committee produced the first industry safety alert with the assistance of the ICF health and safety committee. In addition, the committee attended a workshop in December at which there was a presentation by the Health and Safety Executive in Northern Ireland and the Quarry Products Association of Northern Ireland on the Prestressing Initiative which was very well received by members. It is intended that the committee will also participate in an initial training course on load security requirements in advance of new regulations which will enter into force in 2016.

Ground Limestone Producers Association of Ireland

In 2013 the Ground Limestone Producers Association of Ireland (GLPAI) affiliated to the Irish Concrete Federation. One of the key priorities identified by

the association was the development of links with other organisations, in particular, the Department of Agriculture Food & the Marine and Teagasc. On 23rd January, the new association met with the Department of Agriculture, Food & the Marine to discuss pending changes in the specification for agricultural lime. At the meeting it was agreed that the GLPAI, the Department and Teagasc should form a working group to assist the transition from the current specification to new specification which is likely to be introduced on a national basis upon final revision of EU fertiliser regulations in 2017.

In addition GLPAI also approved the commencement of the design of a new website for Grolime, the trademark owned by the association. The new website which will go live in 2015 will highlight the benefits of lime to farmers, while also differentiating both product and producers who are compliant with the regulations governing the use of the Grolime trademark from those who are not. It is likely that some form of independent auditing of Grolime certified producers will be required in this regard.

The GLPAI is very encouraged by the support it has received both from the Department of Agriculture, Food & the Marine and from Teagasc in the promotion of the benefits of lime to farmers. It is the association's strong intention to influence future demand for lime in a positive direction.

In June the association joined the Fertilisers Association of Ireland with Mr Eoin O'Carroll as its representative. The GLPAI is chaired by Mr Joe McGrath of McGrath Quarries in County Clare and the members of the committee are as follows:

Mr Joe McGrath	McGrath Limestone Quarries
Mr Brian Harrington	Harrington Concrete & Quarries
Mr Francis Harrington	Harrington Concrete & Quarries
Mr John Curran	Lagan Concrete
Mr Christy Loughnane	Loughnane Concrete (Birr)
Mr Enda Hanly	Hanly Quarries
Mr Eoin O'Carroll	Bennettsbridge Limestone Quarry
Mr Ernie Bohan	Roadstone
Mr John Joe McGrath	McGraths Limestone Works
Mr Keith McGrath	McGraths Limestone Works

Mr Mike Cronin	Michael Cronin Readymix
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Mr Peter Gleeson	Gleeson Quarries
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Mr Tom McDonald Jnr	Kilcarrig Quarries
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Internal Communications

ICF continues to provide an intensive two-way communication service for its members on a daily basis. In addition throughout the year, under the supervision of the ICF Council, the federation held regional meetings in six regions on three occasions. The purpose of the regional meetings is to brief ICF members on developments at national level which can impact on their businesses and to outline ICF activities on these issues. ICF remains thankful to all of those members who take the time from their busy schedules to attend the regional meetings.

ICF has five active committees, namely business development, planning and the environment, technical, health and safety and transport. All of these committees facilitate the formulation and communication of ICF policy in these vital areas which impact on our members' businesses. In November, ICF held a major seminar in advance of our Annual General Meeting at which two members from each of our policy committees presented to our members on the work of the relevant committee, outlining some of the key items being addressed on our members' behalf. The large crowd present at the seminar saw at first hand the vibrancy of each committee and the commitment of all of the committee members to the future of the industry.

The activities of the federation are concisely outlined in regular newsletters to members throughout the year. The federation's website will be reviewed in 2015 with a view to using it to a greater extent as a tool to communicate with our members throughout the country.

External Communications

The ability of ICF to influence decision making at the highest level depends on our ability to engage positively with other stakeholder organisations that can support or indeed may wish to oppose ICF policy. Throughout the year, ICF continued to engage with many Government departments and agencies in order to further our members' views on many issues. ICF is deeply indebted to these organisations for their access and openness and we look forward to continuing this engagement in the future. Some of the organisations which ICF engaged with throughout 2014 are listed below. I apologise for any organisation with whom we

have engaged throughout the year for any inadvertent omission from the list.

- Department of Transport
- Department of the Environment, Community and Local Government
- Department of Agriculture, Food and the Marine
- Department of the Arts, Heritage & the Gaeltacht
- The National Roads Authority
- The Roads Safety Authority
- All Local Authorities
- An Garda Síochána
- An Bord Pleanála
- Health and Safety Authority
- FÁS (Solas)
- Environmental Protection Agency
- An Taisce
- National Standards Authority of Ireland
- Geological Survey of Ireland
- Health and Safety Executive (Northern Ireland) Engineers Ireland
- Irish Concrete Society
- Irish Building Control Institute
- Sustainable Energy Authority of Ireland
- UEPG
- ERMCO
- BIBM
- Quarry Products Association (Northern Ireland)
- Mineral Products Association (UK)
- Cement Manufacturers Ireland
- Enterprise Ireland
- InterTradeIreland
- Invest Northern Ireland
- Society of Chartered Surveyors
- Royal Institute of Architects of Ireland
- Association of Consulting Engineers of Ireland
- Construction Industry Federation
- Irish Mining & Quarrying Society

Europe

ICF is a member of ERMCO, the European Readymix Concrete Organisation and of UEPG, the European Aggregates Association. ICF is represented on the Board of ERMCO by Mr Donal Crowley of Roadstone and the ICF nominee to the Board of UEPG is Mr Jim O'Brien, formally CRH and former UEPG President.

Throughout the year ICF participated at committee and board level within the two organisations to influence developments and legislation which impact on all our members at national level. The highlight of the year was the launch of "The Concrete Initiative" on 27th May. The Concrete Initiative led by Cembureau, the

European Cement Association, BIBM, the European Federation of Precast Concrete and ERMCO, the European Readymix Concrete Organisation, has the objective of increasing the understanding of the significant role of concrete in sustainable construction. Details on the initiative can be found at www.theconcreteinitiative.eu.

ICF Social Activities

Our social highlight of the year, the ICF Annual Dinner and Golf Outing, was held on 12th April in Carton House, in the historical town of Maynooth, County Kildare. Once again the event was very well supported by ICF members and associate members. We look forward to the 2015 event which will be held in the beautiful surroundings of Druids Glen in Newtownmountkennedy, County Wicklow.

The other major social event of the year was the holding of a future leaders' activity day for the younger members of our industry in September. This comprised of an exhilarating days racing at the Palmer Sport autodrome at which 27 racing enthusiasts from members located throughout the country experienced the thrill of driving racing cars at speeds previously deemed unimaginable. We look forward to a return visit to Palmer Sport in 2015.

Conclusion

The Irish Concrete Federation remains a highly vibrant and active organisation working on a daily basis on behalf of its members. Clearly with the involvement of so many members around the country, it is impossible to highlight any individuals. Suffice to say that on behalf of the industry, I would like to thank all members of the various committees within ICF who contribute positively to the formation of policy on such a wide variety of issues and contribute directly to the ongoing development of learning and knowledge within the sector which will ultimately secure the industry's future sustainability. In addition, I would like to sincerely thank all members who attend our regional meetings, briefings, seminars and contribute in many different ways towards the viability of the federation, not least financially. We look forward to their continued support in 2015 and in the years beyond.

Finally a special word of thanks to my colleagues in the ICF offices, Liam Smyth, Diane O'Donoghue and Patricia Craig who, on a daily basis, leave no stone unturned in their efforts to professionally and competently represent this industry and its members in so many different ways.

Independent auditors' report to the members of Irish Concrete Federation Limited Report on the Financial Statements

Our opinion

In our opinion, Irish Concrete Federation Limited's financial statements (the "financial statements"):

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

What we have audited

The financial statements comprise:

- the balance sheet as at 31 December 2014;
- the profit and loss account for the year then ended;
- the statement of movement in accumulated reserves;
- the cash flow statement for the year then ended; and
- the notes to the financial statements, which include a summary of significant accounting policies and other explanatory information.

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 and promulgated by the Institute of Chartered Accountants in Ireland (Generally Accepted Accounting Practice in Ireland).

In applying the financial reporting framework, the directors have made a number of subjective judgements, for example in respect of significant accounting estimates. In making such estimates, they have made assumptions and considered future events.

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.

Matter on which we are required to report by exception

Directors' remuneration and transactions

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 that Act have not been made. We have no exceptions to report arising from this responsibility.

Responsibilities for the financial statements and the audit

Our responsibilities and those of the directors

As explained more fully in the Directors' Responsibilities Statement set out on page 3, the directors are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view.

Our responsibility is to audit and express an opinion on the financial statements in accordance with Irish law and International Standards on Auditing (UK and Ireland). Those standards require us to comply with the Auditing Practices Board's Ethical Standards for Auditors.

This report, including the opinions, has been prepared for and only for the company's members as a body in accordance with section 391 of the Companies Act 2014 and for no other purpose. We do not, in giving these opinions, 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.

What an audit of financial statements involves

We conducted our audit in accordance with International Standards on Auditing (UK and Ireland). An audit involves obtaining evidence about the amounts and disclosures in the financial statements sufficient to give reasonable assurance that the financial statements are free from material misstatement, whether caused by fraud or error. This includes an assessment of:

- whether the accounting policies are appropriate to the company's circumstances and have been consistently applied and adequately disclosed;
- the reasonableness of significant accounting estimates made by the directors; and
- the overall presentation of the financial statements.

We primarily focus our work in these areas by assessing the directors' judgements against available evidence, forming our own judgements, and evaluating the disclosures in the financial statements.

We test and examine information, using sampling and other auditing techniques, to the extent we consider necessary to provide a reasonable basis for us to draw conclusions. We obtain audit evidence through testing the effectiveness of controls, substantive procedures or a combination of both.

In addition, we read all the financial and non-financial information in the Directors' Report to identify material inconsistencies with the audited financial statements and to identify any information that is apparently materially incorrect based on, or materially inconsistent with, the knowledge acquired by us in the course of performing the audit. If we become aware of any apparent material misstatements or inconsistencies we consider the implications for our report.

John Dunne
for and on behalf of
PricewaterhouseCoopers
Chartered Accountants and
Statutory Audit Firm, Dublin
27 August 2015

Income & Expenditure Account

Financial Year Ended 31 December 2014

	Notes	2014 €	2013 €
Income		810,968	764,779
Expenditure		<u>(552,134)</u>	<u>(537,781)</u>
Operating surplus		258,834	226,998
Interest receivable	3(a)	626	2,411
Bank interest and charges	3(b)	<u>(446)</u>	<u>(343)</u>
Surplus for year before taxation	1	259,014	229,066
Taxation	4	<u>(1,468)</u>	<u>(2,131)</u>
Surplus for the year after taxation		<u>257,546</u>	<u>226,935</u>

Statement of Movement in Accumulated Reserves

Financial Year Ended 31 December 2014

	2014 €	2013 €
At 1 January	490,436	263,501
Surplus for year	<u>257,546</u>	<u>226,935</u>
At 31 December	<u>747,982</u>	<u>490,436</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.

Balance Sheet

31 December 2014

	Notes	2014 €	2013 €
Fixed assets			
Tangible assets	5	<u>15,024</u>	<u>18,989</u>
Current assets			
Debtors and prepayments	6	701,116	523,651
Cash at bank		<u>302,050</u>	<u>346,523</u>
		1,003,166	870,174
Creditors: Amounts falling due within one year	7	<u>(170,788)</u>	<u>(299,307)</u>
Net current assets		<u>832,378</u>	<u>570,867</u>
Net assets		<u>847,402</u>	<u>589,856</u>
Financed by			
Contributions to capital set-up costs		99,420	99,420
Reserves		<u>747,982</u>	<u>490,436</u>
		<u>847,402</u>	<u>589,856</u>

Irish Concrete Federation Council Members 2014

PRESIDENT

Mr David Wright
Wright Quarry Products
Swanns Cross
Co Monaghan

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

Mr Brian Kelly *
Cemex (ROI) Ltd
Block 6
Central Business Park
Clonminch, Tullamore
Co Offaly

Ms Caroline Quinn
Concast Precast Group
Hazelhatch
Newcastle
Co Dublin

Mr John Farragher
Concrete Manufacturing Company Ltd
Ballygaddy Road
Tuam
Co Galway

VICE-PRESIDENT

Mr Peter Gleeson
Gleeson Quarries Ltd
Laffansbridge
Thurles
Co Tipperary

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

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

Mr Derry McKeown
Kilsaran International
Flathouse Lane
Piercetown
Dunboyne
Co Meath

Mr Larry Byrne
Roadstone Wood Ltd
Fortunestown
Tallaght
Dublin 24

* Brian Kelly retired from Council in 2014

CHIEF EXECUTIVE

Mr Gerry Farrell
Irish Concrete Federation
8 Newlands Business Park
Naas Road, Clondalkin
Dublin 22

COMPANY SECRETARY

Mr John Maguire
Irish Concrete Federation
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Concrete Built is Better Built

