



June 2019

Irish Concrete Federation Regional Meetings – June 2019

Regional Meeting Dates, Times & Venues

Date	Location	Time
20 th June	Abbey Court Hotel, Nenagh	10.30am
21 st June	Castle Hotel, Macroom	10.30am
25 th June	Seven Oaks Hotel, Carlow	10.30am
26 th June	Cavan Crystal Hotel, Cavan	10.30am
27 th June	McWilliam Park Hotel, Claremorris	10.30am

ICF MEETINGS & COMPETITION LAW

“Competition law prohibits agreements or collusion between competitors on any commercially sensitive matters, including in particular price. The ICF is highly conscious of competition law compliance and regularly takes legal advice specifically to ensure ICF arranged meetings and meeting agenda items are consistent with Irish competition law.”

General Economy & Construction

Headline Indicators & Issues

- Economy grew by 7.5% in 2018. Moderate to 4.2% of GDP in 2019; 3.6% in 2020, and 2.6% in 2021. Growth at least two percentage points lower in no-deal / WTO Brexit scenario.
- Unemployment has fallen from 15% in 2012 to a forecast of 5.3% in 2019.
- Nine out of every ten jobs lost since the crisis have been recovered.
- Direct construction employment of 146,500 persons by end Q3 2018.
- Construction employment makes up 6.4% of the total number in employment nationally - 1 in every 15.5 jobs is in construction.

- The largest annual rate of increase was recorded in the construction sector at +13.9% or +17,900 persons to end Q3 2018.
- Construction output up 11% in 2018, 6% in 2019 and 4.2 % in 2020. Average growth rate in the period 2017-2020 of 7%.
- Construction output in 2020 to reach €25bn (in 2017 prices) or €30bn in current prices, (8.8% of GDP).
- Capital investment in 2019 to be 24% greater than 2018.
- Tender Price Index (Society of Chartered Surveyors Ireland) estimated increase of 7.4% in tender prices in 2018. Predicted 7% increase in 2019 (Turner & Townsend)
- 18,000 housing units completed in 2018 (+25%)
 - Apartments : 13%;
 - Housing Scheme: 61%
 - One-offs: 26%
- CIF forecast: 24,000 in 2019 and 28,500 in 2020.
- 2019: Housing @26% of construction; 2023: Housing @ 45% of construction (CSG)
- CIF Crane Count: Dublin City – 123; Cork City – 7; Galway City – 2; Limerick City – 2. (March 2019)

SCSI / PWC Construction market Monitor – (Survey of 250 SCSI Members)

- 56% operating at full capacity
- 60% increased activity on 2018
- Public Housing and infrastructure increases – private housing and private commercial reductions
- Attracting and retaining key talent is the single biggest constraint in the Irish construction sector
- 70% reported shortages in plumbers, carpenters, bricklayers, and quantity surveyors, electricians and civil engineers,
- Other constraint - Tender price Inflation – 7% in 2019 (labour and material costs)

Skills Shortages

- 3398 construction apprentices in 2018 (up 15%)
- Apprenticeships registered in bricklaying and plastering in 2018 were at 12% and 9% of their respective peaks in 2004.
- The new entrants in building and civil engineering in 2017/18 was 57% of 2009 level.

Housing Activity

House Building Activity	Commencements Data	HomeBond & Premier Guarantee Registrations	Completions based on ESB Connections (prior 2018)	Completions based on new calculation
2019 (Jan – April)	7,312	3,461		(Q1) 4,275*
2018	22,467	10,265		18,072*
2017	17,572	9,466	19,271	14,407
2016	13,234	5,626	14,932	9,916
2015	8,747	4,297	12,666	7,219
2014	7,717	2,574	11,016	5,518
2013	4,708	1,326	8,301	4,575
2012	4,042	627	8,488	4,911
2011	4,365	834	10,480	6,994
2010	6,391	1,680	14,602	
2009	8,599	3,743	26,420	
2008	22,852	12,676	51,724	
2007	48,876	38,351	78,027	
2006	75,602	66,649	93,419	
2005	77,709	62,284	80,957	
2004	77,691	60,782	76,954	

(Source CSO Housing Statistics - *Note: Change on Reporting - CSO figures from ESB Connections)

New Dwelling Completions - New CSO figures by quarter

Year	Quarter	Totals
2017	Q1	2,778
	Q2	3,275
	Q3	3,787
	Q4	4,567
Total		14,407
2018	Q1	3,475
	Q2	4,404
	Q3	4,671
	Q4	5522
Total		18,072
2019	Q1	4,275
Total		4,275

Total Housing Commencement Notices

	2015	2016	2017	2018	2019 (Jan-April)	2015 "One-Offs"	2016 "One-Offs"	2017 "One-Offs"	2018 "One-Offs"	2019 (Jan - April) "One-Offs"
Carlow	62	94	242	218	63	45	50	59	65	22
Cavan	96	107	107	118	42	82	82	87	92	33
Clare	109	200	228	352	143	101	145	160	216	88
Cork	837	1527	1720	2195	876	455	555	697	698	234
Donegal	231	310	345	328	126	170	211	218	226	71
Dublin	3886	5404	6987	7707	2549	334	369	372	498	126
Galway	354	423	669	965	375	246	297	386	401	125
Kerry	187	212	339	526	145	145	183	208	220	70
Kildare	718	919	1355	1687	598	160	208	222	229	102
Kilkenny	111	170	187	359	224	96	136	157	163	52
Laois	105	182	177	346	96	56	100	129	117	41
Leitrim	21	18	34	17	4	21	18	25	17	4
Limerick	176	419	430	657	150	103	138	178	165	66
Longford	19	52	52	96	55	17	38	46	41	21
Louth	151	350	668	943	143	91	108	144	170	65
Mayo	141	211	321	380	181	128	179	243	224	81
Meath	381	1028	1575	1898	498	190	284	357	315	111
Monaghan	72	103	143	299	48	65	86	127	141	40
Offaly	75	115	122	176	74	75	84	83	99	37
Roscommon	47	79	111	114	36	38	66	87	91	36
Sligo	41	77	125	168	33	39	73	75	82	33
Tipperary	96	133	160	311	98	90	124	151	168	60
Waterford	161	223	291	460	162	72	118	108	109	43
Westmeath	59	73	138	306	92	54	71	125	141	43
Wexford	208	279	473	635	230	146	179	241	244	85
Wicklow	403	526	573	1206	271	92	110	139	146	29
Total	8,747	13,234	17,572	22,467	7,312	3,111	4,012	4,824	5,078	1,718

Capital Expenditure

Budgeted Capital Expenditure 2018 – 2021 (NDP – Feb 2018)				
	2018	2019	2020	2021
Exchequer Capital Expenditure (€'000)	5,800	7,300	7,900	8,600

Capital Expenditure

	2014 Jan - Dec	2015 Jan - Dec	2016 Jan - Dec	2017 Jan - Dec	2018 Jan - Dec	2018 Jan - May	2019 Jan - May
Gross Voted Capital Expenditure ('000m)	3,202	3,518	3,919	4,323	6,011	1,883	1,429

(Source Dept. of Finance)

Brexit

- EU grant membership extension to UK until October 31st 2019
- Extension to provide further time to UK government to approve withdrawal agreement.
- Withdrawal agreement makes provisions for a transition period – no change
- Transition period to allow more time to negotiate future trading relationship between EU & UK.
- If UK does not ratify withdrawal agreement – possible “no-deal”.
- “No-deal” means no transition period.
- Trading immediately on a WTO basis – introduction of levies.
- Remember – implications for standards, notified bodies, importing

Technical Update

SR 18 – Aggregates for Mortar

- Aggregates Panel (NSAI) currently finalising the S.R. 18: Aggregates for Mortar guidance.
- Next meeting June 26th.
- Public consultation.
- Requirement for System 2+ accreditation
- Requirement for resource and production review by a professional geologist similar to S.R. 16.

TII Changes to DN-PAV-03023 ‘Surfacing Materials for New and Maintenance Construction, for Use in Ireland’

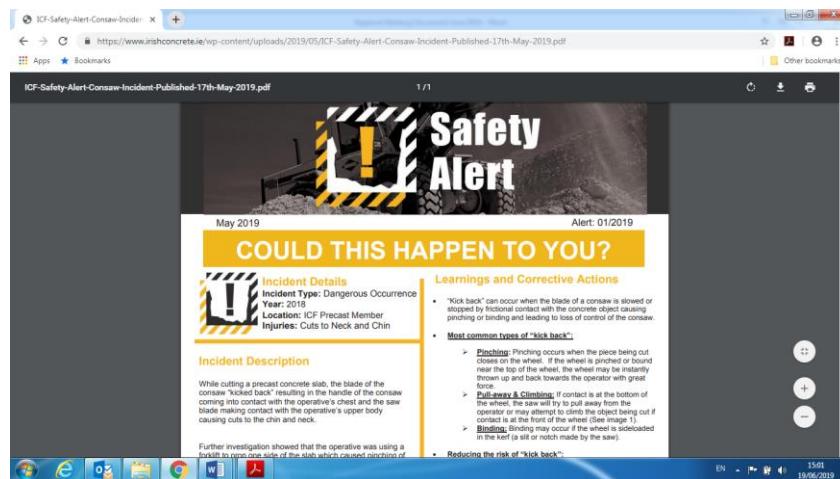
- TII seeking more traceability for supplies including a registration process for all high PSV sources;
- ICF and IAPA in joint consultation with TII;
- Most requirements are per existing good practice/SR17;
- Role of Professional Geologist included;
- Will be replicated in SR17 when that is revised in coming years;

ICF Research Project

- Lack of established data and knowledge on the freeze/thaw resistance of blocks.
- ICF preparing research project with the Technological University of Dublin (TUD)
- Objective to develop a suitable test method for block durability and to inform the development of suitable performance metric for blocks to achieve their “fit for purpose” requirement.
- Examine suitable tests and relationships between key parameters that impact on freeze/thaw resistance of concrete blocks.
- Issues on the interpretation of results, confidentiality of the research findings and Enterprise Ireland funding being addressed.

Health & Safety Update

ICF Safety Alert



Alert



QSCS Tickets

- Solas Advisory Group and Working Groups overseeing reform of QSCS
- QSCS and CSCS to be merged

- Moving from a qualification (QQI) to a licence
- Solas proposing 2-3 week mandatory training course for new entrants, with ongoing CPD and assessment upon renewal.
- ICF & CIF will oppose.

Brake Testing – HSA Guidance – Compromise Wording

Establishing the expected brake ratio of the vehicle

- If it is a new vehicle then the manufacturer must provide adequate information including the **expected brake ratio**.
- For older vehicles where there is little or no information on braking efficiency then an electronic brake tester can be used to determine the optimum brake ratio by carrying out a number of tests following servicing of the braking system and obtaining an average value. Then a lower action level is determined at which the vehicle braking system will require further assessment or servicing.

Periodic Brake Testing Of Vehicles

Electronic brake testing is a procedure for periodically checking that a vehicle's brakes are maintained (working) at a level that does not put people at risk. The electronic brake tester determines braking efficiency by measuring the rate of deceleration until the vehicle comes to rest. Electronic brake testing is recommended to be carried out every 500 hours of vehicle use or every three months, whichever comes first and the results recorded to identify any deterioration or sudden reduction in braking performance*. Usually this means:

1. Ideally that the level of performance has not significantly reduced below the **expected brake ratio**; or
2. At the very least, that the level of performance **exceeds that required for safe working** under the most onerous site conditions of speed, load and gradient.

Health and Safety Authority Quarry Boundaries and Water Hazards Inspections

- Health and Safety Authority (HSA) conducted inspections from the **4th - 7th June 2019** on quarry boundaries and water hazards.
- Inspections were based on the checklists that were discussed and distributed at the recent ICF/HSA Health and Safety Workshops.
- Checklists from the workshop as well as a quarry drowning safety alert can be found in the members area of the ICF website.

Planning & Environment Update

Planning Applications

- Recommend that Liam Smyth is advised of applications prior to submission to ensure that appropriate ENGOs are made aware of applications and included in pre-application scoping directly by ICF.

Section 42

- Many permissions have conditions which state expiry of term other than where a new permission is achieved

- Section 42 should not be relied upon in such circumstances; this has been the subject matter of 2 Judicial Reviews by Sweetman & Associates in the last 2 years.

Inert Soil & Stone

- Waste Management (Facility Permit and Registration) (Amendment) Regulations 2019
- Legislation to increase the cumulative Waste Facility Permit threshold to 200,000 tonnes. (Class 5).
- 3 month commencement period.

End of Waste Criteria (Construction & Demolition Waste)

- ICF Submission on National End of Waste criteria – June 2018
- EPA have sought further information including Environmental Risk Assessment – June 2019
- Provisional end of waste criteria for crushed concrete in roads at draft stage 9(operator level).

Article 27 Guidance on Soil and Stone By-Products

- ICF submission on the EPA public consultation on Article 27 guidance on soil and stone by-products.
- New EPA Guidance issued – June 2019.

Planning Policy Document

- Document completed
- 3 key messages:
 1. **Essential aggregates**
 2. **Identification and protection of aggregate reserves**
 3. **Quarry Planning Process**
- Proposed PR Launch & Follow up engagement with TDs.

Marketing & Promotion Update

Updated Advertisement



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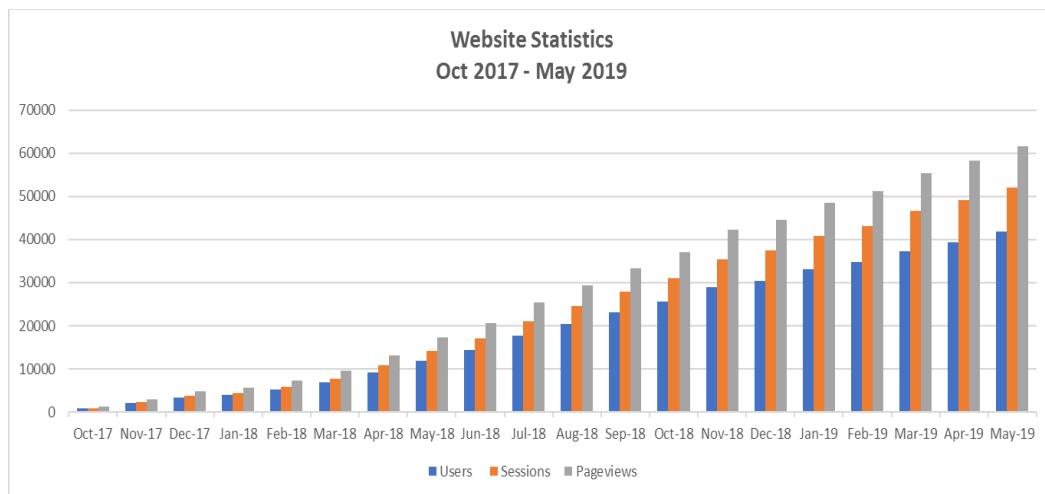


Ballyboughal
Co. Dublin



Maynooth
Co. Kildare

Website



Date	Oct '17 - March '18	Oct '17 - June '18	Oct '17 - Sept '18	Oct '17 - March '19	Oct '17 - May '19
Sessions	7,775	17,087	27,855	46,607	51,996
User	6,836	14,312	23,060	37,263	41,732
Pageviews	9,619	20,676	33,355	55,443	61,681



Threat to Masonry

- Apprenticeships registered in bricklaying and plastering in 2018 were at 12% and 9% of their respective peaks in 2004.

	2006	2017
Plasterers	300	30
Painters / Decorators	161	45
Bricklayers	679	65
Floor and Wall tilers	43	0

Transport

Weight Limit 5 Axle Rigid Update (pre – Feb 1st 2018)

- *“Vehicles in this category may continue to operate at their plated weight for weights not to be exceeded in Ireland”. – RSA Website.* Meeting with RSA upcoming

Driver Break & Rest Periods (Regulation 561/2006)

“(7) Article 13 (1) is amended as follows:

(a) point (e) is replaced by the following:

“(e) vehicles operating exclusively on islands or isolated regions from the rest of the national territory not exceeding 2.300 square kilometres in area which are not linked to the rest of the national territory by a bridge, ford or tunnel open for use by motor vehicles, nor are they bordering any other Member State. ”;

(b) the following point (q) is added:

“(q) vehicles used for the delivery of ready-mixed concrete.”;

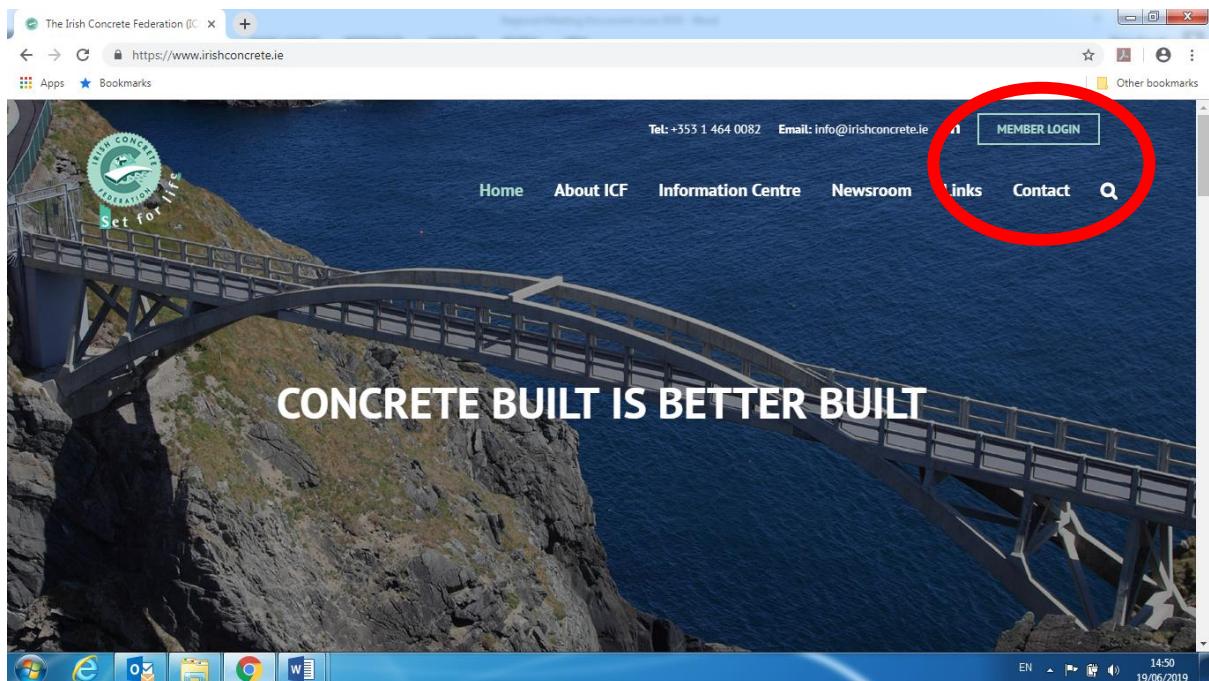
Amendment

(7c) in Article 13, paragraph 1, the following point is added:

“(pa) vehicles or combinations of vehicles with a maximum permissible mass not exceeding 44 tonnes employed by a construction undertaking up to a 100 km radius from the base of the undertaking, and on condition that driving the vehicles does not constitute the driver's main activity;”

- The next stage will be a “trilogue” where the Council, Parliament and Commission will try to agree a common wording - a compromise text - which is suitable to all.

ICF Website – Member Login



Precast CAD Design – City & Guilds

**CITY & GUILDS LEVEL 3 AWARD
IN 2D COMPUTER AIDED DESIGN
(Precast Concrete)**

BEGINS: 28th June 2019
TIMES: 9am to 4pm on Fridays & Saturdays
VENUE: Further Education & Training Campus, Dublin Road, Cavan.
DURATION: 5 week period 60 teaching hours with 30 hours self-directed

An Garda Síochana - Blasting

Superintendent

Mallow

Re: Notification of delivery and disposal of Explosives at _____
Quarry on the _____ and requirement for the provision of a Garda Escort.

UNDERTAKING OF PERSONAL LIABILITY

I/We the undersigned, being the Manager/Director of _____

_____ hereby personally guarantee
to be responsible for payment to the Commissioner of An Garda Síochána of the
amount calculated in accordance with the prescribed rate of charges and expenses
which shall be payable for the services of members of the Garda Síochána
provided at the request of your company for the overseeing of delivery and
disposal of explosives on _____ at _____ Quarry.

Signature: _____

Signature: _____

Date: _____

Valuation Office - Revaluations

Completed Revaluations	Revaluations 2019	Revaluations 2021	Occupier Assisted Valuation – Pilot Project
Sligo	Fingal	Donegal	Laois
Leitrim	Cavan	Mayo	
Roscommon	Monaghan	Galway	
Longford	Louth	Clare	
Westmeath	Meath	Cork	
Offaly	Wicklow	Kerry	
Kildare	Wexford		
South Dublin	Tipperary		
DunLaoghaire– Rathdown			
Dublin City			
Carlow			
Kilkenny			
Waterford			
Limerick			

- The notional rental rate of 25cent / tonne is being applied for quarry output. (Note: Rate of 75 cent / tonne in the Greater Dublin Area)
- The valuation of the fixed plant is on a replacement cost basis not a “book value” or second hand value.
- The rental rates applied to buildings and yards is being disputed in some cases.

ICF Newsflash

**IRISH CONCRETE FEDERATION
NEWS FLASH**

30th May 2019

Welcome to the first Irish Concrete Federation (ICF) News Flash. The ICF will issue a News Flash to communicate important messages to our members when required. If you would like additional contacts in your company to receive the ICF News Flash please contact Joanne Boylan at: joanne.boylan@pathconcrete.ie

Health and Safety Authority Quarry Boundaries and Water Hazards Inspections

The Health and Safety Authority (HSA) will be conducting inspections from the 4th - 7th June 2019 on quarry boundaries and water hazards. The inspections will be based on the checklists that were discussed and distributed at the recent ICF-HSA Health and Safety workshop. We ask all members to ensure that they have reviewed the checklists and have made appropriate health and safety improvements where required. The presentations and checklists from the workshop as well as a quarry drowning safety alert can be found in the members area of the ICF website.

For More Visit ICF Members Area



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