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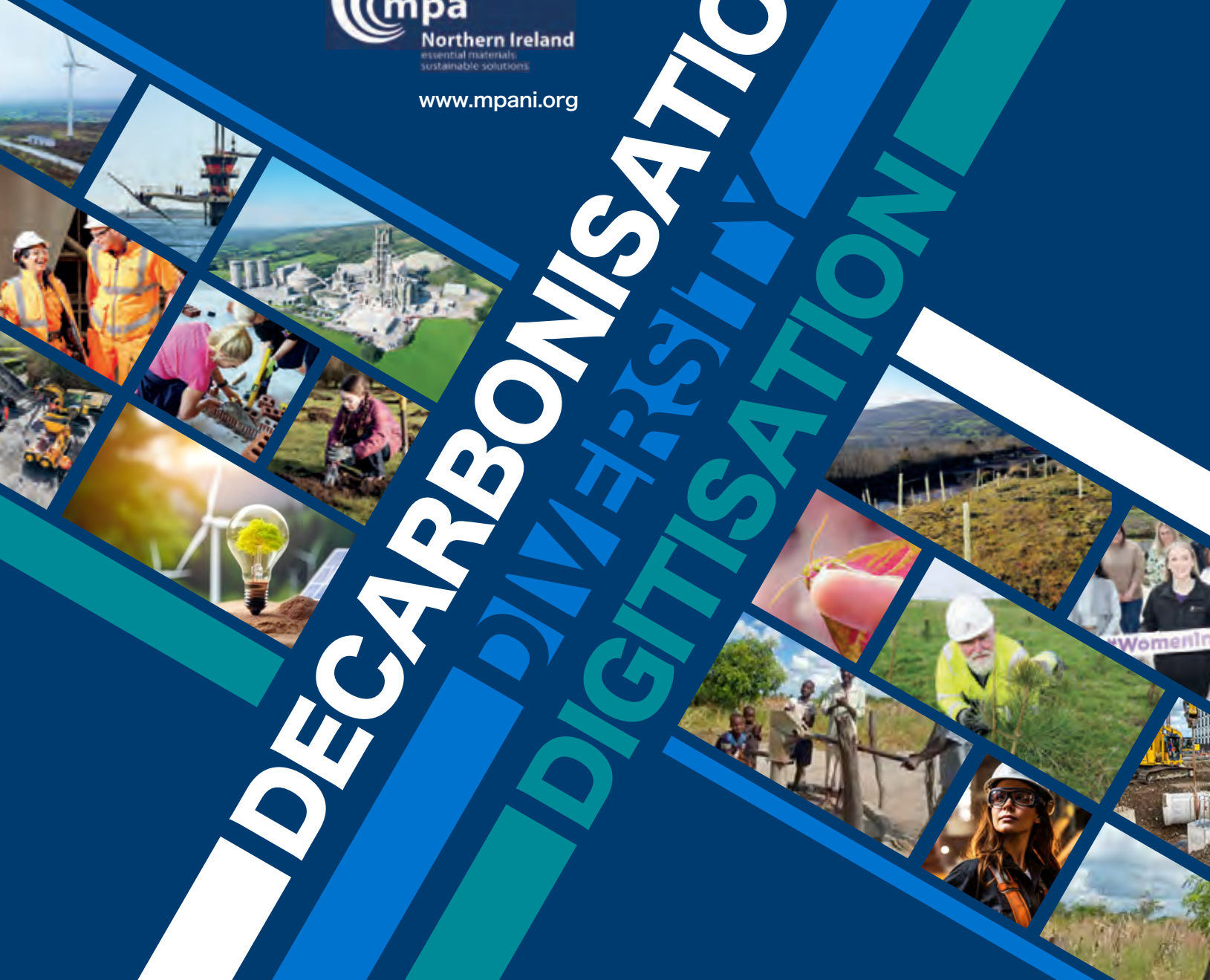
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This journal is published by 'Plant & Civil Engineer', a division of 4 SM (NI) Ltd, at The Old Coach House, 12 Main Street, Hillsborough, N. Ireland BT26 6AE. The publishers cannot be held responsible for any inaccuracies supplied by the contributors. All rights reserved. The contents of this publication may not be reproduced or transmitted in any form, either in part or in full, including photocopying and recording, without the written consent of the owner. Nor may any part of this publication be stored in a retrieval system of any nature without prior written consent of 4SM (NI) Ltd.

MPANI 2024/25 is Published by:
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Foreword

It is a honour to be asked to pen this Foreword for this the 10th MPANI Industry Journal at a time of significant change across our economy and industries.

Economic Disruption through Decarbonisation, Digitalisation and Decentralisation and its Impact on Energy, Materials and the Built Environment.

Economic disruption driven by Climate Change and environmental objectives is having a transformational effect on reshaping industries and influencing policy decisions whilst providing a catalyst for growth innovation and adaptation. New technologies, business models, and processes emerge as a response to these challenges. Companies that fail to adapt risk losing market share or becoming obsolete.

Economic disruptions also create investment opportunities. Investors seek sectors that are poised for growth during and after disruptions. There are risks associated with market volatility and uncertainty, Government policymakers must balance both the short-term relief with long-term sustainability as the economy shifts.

Three of the main drivers for change affecting current fields of endeavour involves Decarbonisation, Digitalisation and Decentralisation – the three “D’s”. These three phenomena appear disruptive in every field, posing a big challenges to both businesses and government policy makers.

The declining average carbon intensity of primary energy over time has accelerated the exploitation of new and clean energy sources. The electrical power system in particular is being impacted with different needs and a resource mix dependent on an interconnected and stable electricity grid which is the backbone of a well-functioning and competitive energy market.

The growing demand for renewables requires grid integration which is not an easy task due to network inadequacy and the fact that there is not enough physical capacity to accommodate supply and demand connections. This is due to difficulties in optimizing grid



capacity that was designed for centralised fossil fuel generation and inefficient grid planning.

Greenhouse gas reduction objectives has meant the re-defining of each place in terms of its carbon footprint and re-organizing our future ecosystem across all economic sectors including the Built Environment, Mobility / Transport, Energy, Heat Networks, Manufacturing, Healthcare, Education etc.

This ecosystem includes homes, offices, factories, highways, and more and by implementing effective solutions. In this scenario companies can not only lower emissions but also create immediate value.

The built environment accounts for 40% of total energy used including emissions. This represents new business opportunities as global Decarbonisation gains traction. Environmental compliance and sustainability are needed for new and existing infrastructures.

In the competitive construction industry, a focus on reducing the carbon footprint of materials and the embodied carbon throughout a building's lifespan is becoming increasingly important. Suppliers who can demonstrate a commitment to sustainability by offering low-carbon materials and solutions will be well-positioned to thrive in this emerging market.

To remain competitive, suppliers must prioritize minimizing the carbon value of their materials and providing products that contribute to a reduced carbon footprint throughout the building's entire lifecycle. This shift towards sustainable practices is not only essential for environmental responsibility but also a key factor in meeting the growing demand for eco-conscious construction projects.

Within the overall context, it is also worth underlining the main role played by ICT and automation both in buildings and in the power grid. In particular, Decentralisation and Digitalisation for power systems are common enabling technologies due to the need for connections and communication between decentralized generators, load aggregates and storage systems and grid connected buildings within a low carbon footprint.

The NI construction materials sectors de-carbonisation delivery will be critical to the wider net zero ambitions of the built environment and transport sectors. In this regard I pay tribute to the work of MPANI in bringing together all parts of the minerals sector to collaborate on achieving decarbonisation. May I wish you well and CforC support in these endeavours.





Pat O'Donnell & Co.



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Chairman's Report

Northern Ireland continues to move forward addressing Brexit, Covid-19 and the energy crisis with increasing control and effectiveness, however new challenges consistently arise to test our resolve i.e. carbon reduction, local planning and labour shortages to name a few.

With the recent restoration of the Executive and Assembly at Stormont and the opportunities presented by the Windsor Framework for our local economy, I am confident that by continuing to work together as we have been, supporting the MPANI, keeping it strong and making our voice heard we will ensure a sustainable future for us all.

I have been a member of MPANI (previously QPANI) for nearly 25 years and have witnessed many changes and challenges during this time, our approach to Health and Safety and the environment has improved immensely. We discuss these very critical issues more openly and share information for the benefit of all. I am also encouraged by how Employers within our industry have embraced the health, welfare and wellbeing of their employees which can only be a positive development.

Technology has advanced at an increased pace over the past few years and provided artificial intelligence is kept under control we will continue to see benefits for everyone in our industry.

It is an honour for me to take on



Paddy Mohan.

the Chairmanship of MPANI. I have served on the Executive Committee since 2000, made many friends and I will certainly do what I can to follow in the footsteps of Paul Brogan and all the previous Chairmen.

It is great to be part of an Executive

Committee that is bringing on new younger members who will undoubtedly embrace new ideas to carry us through the next decade and beyond. I welcome Willie Doherty from Creagh Concrete, who thankfully accepted the role of Vice Chairman.

The strength of our organisation lies in the membership's support and commitment to what the MPANI stands for, acting on behalf of all to protect our right to operate.

We now have a vibrant young leaders' group and it is fantastic to see the success of our Women in Minerals Group. I encourage the next generation within our industry to get involved in these groups and our sub committees.

With the support of Gordon, Fiona, Willie and the Executive Committee, I will endeavour to build on the Association's success to date, we will continue to develop and grow relationships and working partnerships with other organisations within the NI Business Community and beyond.

Thank you all for your support and commitment, together we will ensure a prosperous and sustainable future for our industry.

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MPANI

Past Chairman's Report

In preparing for this address I took the opportunity to review how things have developed since my inaugural review.

The same challenges are out there in relation to inflation, energy prices, labour and skills shortages, albeit we have seen improvements in the level of inflation and energy, it is still of concern to our members. The repercussions of Brexit have been placated for the time being, but there is still much work to do on this front to give long term stability to trading arrangements both east / west and north / south.

The association continues to work collaboratively with various groupings be that the CEF, NICG, NIBrexit working Group, DFI liaison and health and safety groups and is now moving into the specialised area of forming partnerships in relation to decarbonisation, carbon capture and other matters of sustainability which are crucial for the future of the planet.

Through the work of the Highway Maintenance Group, we reached agreement with BCIS and DfI on the production of a fair system of price adjustment indices for Bitumen to give greater certainty to both industry and our clients organisations in relation to work undertaken on term contracts for DfI.

All of these confirm that we must continue to collaborate with other associations and organisations because we are stronger together with one voice putting representations to governments both locally and at national level.

What we need from governments are commitments that the months



Paul Brogan.

and years which go into finding innovative solutions will be supported both financially and by a commitment to use the products that are developed through the efforts of MPANI members.

Now that we have a local government back up and running again it is for the association to hold the departments to task on commitments given to our industry. Sustainable budgets need to be secured, the planning system needs to be made fit for purpose, and the regulatory bodies need

to see themselves as partners of industry and not always policemen.

Throughout my term as Chair, MPANI members were very supportive of the association through the various committees and our thanks is given to the companies who made staff available to carry on the essential work of the association.

The association is well served by the leadership of Gordon Best, ably supported by Fiona Taggart. This past year marked a significant milestone in the associations history with the passing of the 25 year mark. This was marked by a lunch of past chairs and while it was commented that chairs come and go there has been one constant which we have always been able to rely upon. The industry owes a great debt of gratitude to Gordon for his sterling efforts in keeping the profile of our sector to the forefront at all times.

Fiona, also provides very effective management of both Gordons and the chairs diary, is a wonderful organiser, and she is a very skillful at adapting her writing style to that of the incumbent chair.

Both have made the past two years a very smooth journey as I know they will continue to do for the incoming Chair. May I extend my thanks to Gordon, Fiona, the executive team and all committees who have supported me over the past 2 years.

Finally may I wish Paddy Mohan every success in his incoming term of office.

MPANI Regional Director's Report

Decarbonisation,

Diversity and

Digitisation

Two years ago when I began to pen this report for our 2022/23 Journal it was under a cloud of continued political vacuum in Northern Ireland with our Assembly not sitting and no Executive in place to make much needed local decisions.

It's great to begin this report in a more positive frame of mind and with, what I believe, is very much a glass half full attitude as we look forward to the rest of 2024 and beyond. The restoration of our local Executive and Assembly is welcome and lets hope that we will now see a long period of political stability resulting in sustained economic growth and prosperity that the people and businesses of Northern Ireland so richly deserve.

I have been up on the "hill" a few times since its restoration and you sense the determination to get to work on what are the many challenges facing our community and economy. However, we will judge the success of the Executive on the difficult and unpopular decisions they make, not the easy and popular ones.

What is required is urgent decisions, some difficult and that will be unpopular, to fundamentally reform many of our key economic enablers which have been subject to years of drift and delay. We can achieve our goals and overcome these significant challenges if our Executive works collaboratively with NI Business and our community sector to catch up and repair two years, and previous closures of our Assembly, of lost opportunity costs and take advantage of the unique trading position that we now enjoy with access to both EU and UK markets.

MPANI continue to engage with the Economy, Infrastructure and AERA Ministers and the Assembly Committees briefing and updating them on the work we do with their Departments and Agencies



Gordon Best.

highlighting our concerns and offering possible solutions to the many current and future challenges facing us as a society and economy.

As we look forward positively to the remainder of 2024 and beyond, I would recommend that you take time to look at our objectives and focus areas so you get an appreciation of the work ahead. You can view these using the links below:

MPANI Focus Areas and Objectives 2024

Concrete Development Group Objectives 2024

Health & Safety Committee Objectives 2024

Highway Maintenance and Construction Group Objectives 2024

Planning and Environmental Committee Objectives 2024

It is becoming increasingly clear that the pace of change created by Covid, geopolitical turmoil and the ever increasing threats from climate change is increasing faster than at any time in living memory. Many have called this change the "Fourth Industrial Revolution" that we began to witness an acceleration in change and transition. We have entitled our 2024/25 Industry Journal, "A Transition Journey – Are You Prepared?". It is a challenging question but one that is relevant to every single MPANI Member. With Climate change legislation now in place, recruitment and retention of skilled people an everyday challenge it means the "triple" transition train heading for Decarbonisation, Diversity and Digitisation has left the platform and if you're not on it, or you don't intend to catch up and get on at the next stop, then quite simply you are going to be left behind.

Our Membership continues to remain strong and very supportive and my thanks again goes to our Executive Committee, ably led by Chairman Paddy Mohan, Vice Chair Willie Doherty and immediate past Chair Paul Brogan, all of whom help set the direction and focus for me and our hard working sub committees.

Our Health and Safety Committee continue to be proactive and lead on giving important leadership and advice to our wider membership. We continue to work collaboratively with HSENI on a number of initiatives including Machinery Guarding, LOTOTO, Site transport safety, mental health and well-being and our Stay Safe Stay Out Campaign. The feedback from HSENI and

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2 **Workplace transport and
pedestrian interface**

3 **Work at height**

4 **Workplace Respirable
Crystalline Silica**

5 **Struck by moving or
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6 **Road Traffic
Accidents**

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5 **Collaboration and Sharing**
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6 **Compliance**
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Members on industry engagement and improving standards is good to hear.

Over the past few years it has been pleasing to see the number of Northern Ireland Members enter the MPA Health and Safety Awards and receive recognition at the MPA Conference in London. Details of all the entries into the MPA Health & Safety Awards are available on SafeQuarry.com, the free-to-access mineral products global hub for health and safety. Videos of the finalists and winning entries can be viewed on the MPA YouTube channel. Let's hope for more MPANI Member success in this year's awards.

Our Health and Safety Committee will continue to advise and inform members on all aspects of Health, safety and well-being. I would like to thank those members who consistently contribute to and support our lost time incident data collection. This information enables our safety committee to monitor and bench mark industry performance and progress on our journey to “vision zero”. It also gives us the information we need to identify high risk areas that we can then focus our efforts in assisting Members.

We would suggest to you, 6 strategies to improve;

1. An unrelenting approach to eliminating the things that can kill or seriously harm people through adoption of industry safety

principles and good practices focused on ‘The Fatal 6’.

2. Developing competent and committed leaders at all levels.
3. Promoting recognition as a means to support a positive culture within the workforce.
4. Creating forward looking measurement systems which balance the measurement of ‘the presence of safety’ with the ‘absence of incidents’.

5. Helping members to create workplaces where health and well-being is protected and promoted.
6. Actively promoting and facilitating engagement from all member organisations

Our Planning Committee continue their work with NIEA through our liaison group, working on updates for the “Wise Use of Water” and “MoU on Archaeology” guidance and we responded to a number of consultations. We will continue to



L-R: Incoming Vice Chair, William Doherty, Creagh Concrete;
Incoming Chair, Paddy Mohan, Mannok; Regional Director, Gordon Best;
Outgoing Chair, Paul Brogan, McQuillan Cos.



Members of NI Business Brexit Working Group meeting with Finance Minister, Dr Caoimhe Archibald.

engage on the challenges of climate change and Biodiversity Net Gain. The planning system in Northern Ireland continues to come in for high levels of criticism and MPANI continue to call for a fundamental review and the introduction of a shared service within the local councils for mineral and waste planning applications.

Recent years has certainly witnessed an increase in debate and activity about decarbonisation and net zero. A number of members are currently involved in collaborative networks looking at the use of biomethane and biochar in concrete products. We are engaged with the Department for Infrastructure about their own Transport and Materials Climate Action Plans. MPANI members have a strong interest in facilitating the generation of renewable or low carbon

electricity for society. The location, extent and the availability of natural resource (eg wind and water) at our members sites means that we are well placed to facilitate lower carbon technology rollout and innovation.

The reality is that Net Zero will be delivered through innovation and technology by the private sector. Central and Local Government are the “enablers” who set strategy, policy and provide much of the incentive funding to get projects off the ground. We now need our Assembly and NI Executive to urgently address planning reform and the upgrading and extension of our electricity grid to facilitate more and cheaper connections from rural businesses that have the potential to generate renewable energy.

MPANI are partners in the exciting “NI Decarbonisation Plan” led by Invest NI

and also supported by our colleagues in Manufacturing NI and all of the 11 local Councils. This engagement has given me the opportunity to highlight the huge amount of time and resources our industry is investing in new technologies and partnerships as we transition towards net zero.

Given the geo-political stresses across the world Governments are now re-thinking their positions on the need for locally extracted critical minerals. I attended a Department for the Economy workshop in the Riddell Hall, Queen’s University Belfast to consider responsible critical minerals sourcing in Northern Ireland. The aim of the event was to explore and consider the role of critical minerals in the economy of Northern Ireland and consider how that activity fits with green growth, energy transition and climate adaptation.

Our Highway Maintenance and Construction Group have had a very busy two years dealing with the challenges of roads maintenance funding and the impact of the non-performance of the BCIS R10/15 Bitumen Indice. We engaged widely with BCIS, the Office of National Statistics, MPA, Department for Infrastructure and Eurobitume, the representative body for UK Bitumen Suppliers. We are pleased that this partnership approach and pro active engagement between all stakeholders resulted in a sustainable solution being reached.

The lack of an NI Executive making local decisions and the impact of the NI budget set by the Secretary of State in April 2023 meant there was a significant shortfall in roads maintenance funding. MPANI actively engaged with the DfI to ensure that all funding was allocated to Road Divisions and issued through works orders. The focus for everyone must be to ensure that future



Large audience at our inaugural Women in Minerals Group networking event in February 2024 at the Elk Toomebridge.



MPANI Regional Director, Gordon Best, speaking at the Women in Minerals networking event.



budgets are multi-year that will facilitate better planning, better investment decisions and better value for money for everyone.

Together with DfI we continue to keep our focus on road worker safety with two social media campaigns asking the general public to drive safely through roadworks, obey signs and diversions and show respect to our workers.

We continue to offer the Highway Maintenance and Construction Site Supervisors L4 NVQ training and assessment. To date 17 candidates have successfully completed the course.

Our Concrete Development Group also have had a busy last couple of years with changes to BS8500 facilitating the specifying of more low carbon cement and concrete. Huge change is underway, and more will follow, but it is clear that Industry, particularly MPA, are at the forefront of these changes.

A highlight of recent times has been the formation of our “Women in Minerals Group”. The group has set its goals to

- Highlighting and promoting career opportunities for women and young girls#
- Women’s health and well-being issues in our sector

- Working and networking with Womenstec, CITBNI Women in Construction and IoD Women in Business.

Given the high age profile of our sector we must focus our attention in making our industry a welcoming career opportunity for young women and girls.

As I said at the start of this report we are, as an industry and society, in the process of major change and transition. This “Triple D Transition” of Decarbonisation, Diversity and Digitisation” will see a rate of change never experienced before. The market turmoil that can be created by conflict and political upheaval across the world we cannot control but by working in partnership and collaboration as an industry we limit the impact.

Talking of transition, the representation on our Executive Committee has also changed. Those leaving us were Stephen Robinson and Eamon Finnegan and I wish them well as they head into retirement, although I don’t think both men will let the moss grow under their feet. We wish them well. At the same time, we welcome Jonathan Cole of Breedon, Franklin McIlroy of RTU, Dermot Morgan of Gibsons, Marty McGrath of Mannok and Fraser Thom of Breedon Group

and Peter Collen of Collen Brothers onto the Executive. It’s good to see the age profile of the Executive Committee drop somewhat!!

I am delighted to welcome Paddy Mohan of Mannok as MPANI Chairman. Paddy is the last member of the QPANi Executive Committee that I walked into on a sunny Thursday in June 2001. Paddy is well known and respected across our Industry, both North and South, and I look forward to working with him, with Willie Doherty of Creagh Concrete as our new Vice Chair and of course Paul Brogan our outgoing Chair.

Finally, on behalf of Fiona and myself can I thank all of you for your continued support and wish you and your family a very safe, healthy and successful time ahead.

Best wishes and Stay Safe



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View from the South Irish Concrete Federation

It is my pleasure to contribute to the MPANI 2024/25 Journal which will hopefully give readers a sense of the key focus areas, challenges and priorities for the Irish Concrete Federation (ICF) currently. In particular, I would like to thank the MPA (NI) Regional Director, Gordon Best for the opportunity to contribute to this publication, which I know is regarded as the most comprehensive source of information on how the Northern Ireland mineral products industry is viewed by industry stakeholders.

I would also like to take this opportunity to express our gratitude for the continued co-operation and support for ICF, which is always forthcoming from MPA (NI) and which I know will continue under the leadership of Chairman, Paddy Mohan of Mannok, who has been a highly respected figure among the ICF membership for many years.

It is likely that 2024 will be largely similar in output to last year for the majority of ICF members as current economic forecasts remain positive, at least in the short term. However, it sometimes seems that demand for construction materials is more dependent on weather forecasts, rather than their economic counterparts. The most recent spring, with its seemingly never-ending high rainfall led to a sluggish start to the current year, particularly in rural areas. However, the second quarter has seen a welcome uplift in demand and we are cautiously optimistic that current levels of activity will be maintained for the remainder of the year.

The most recent economic forecasts have estimated that the population of the Republic of Ireland will be almost six million by 2030, outstripping the population growth rate envisaged under 'Project Ireland 2040' and the National Planning Framework. The increasing population will give rise to new societal demands for investment in public infrastructure, particularly housing.

It is accepted that notwithstanding a significant increase in new house construction to 32,000 units last year, the current level of housing output is a severe constraint for Irish society and its economy, with demand for housing running at twice the level new home construction. This reality represents both a challenge and an opportunity for the entire Irish construction sector. It is likely that



*Gerry Farrell, Chief Executive,
Irish Concrete Federation*

housing output this year will experience a further increase to approximately 35,000 new completions, which should result in a consistent demand for aggregates and concrete products.

It has become abundantly clear that the planning system in Ireland is no longer fit for purpose. It is estimated that there is up to two year's supply of housing held up in the planning system at a time when the need for new housing is at unprecedented levels. Notwithstanding the obvious focus on housing, our own industry has not been immune from the massive delays in the planning system.

ICF has carried out a detailed analysis of quarry planning applications during the 2017 to 2023 period which shows that quarry planning applications are now taking almost three years to get through the State's planning system, even for extensions

of existing quarrying operations.

ICF will publish its findings in a report later this year to highlight the damage that such delays are causing to the delivery of Ireland's national infrastructure. This report will be a follow up to "Essential Aggregates - Providing for Ireland's Needs to 2040" which we published in 2019. ICF is also closely monitoring progress of the Government's new Planning and Development Bill, which will hopefully underpin the development of a planning system that provides the social, economic and physical infrastructure necessary to meet the needs of our people in a way that protects the many qualities of our natural and built environment.

Similar to other countries and regions, there is ever-increasing attention focused on industry's response to the climate change challenge across all sectors of the economy. In this respect, there is no doubt that all stakeholders will closely monitor developments in the cement and concrete sector as it continues on its journey of decarbonisation, increased circularity and reduced impact on nature and the environment.

In 2023, the ICF Council took a decision to fully resource the organisation's activity in this area and earlier this year we appointed Conor Hayes as our new Head of Sustainability. Conor comes to ICF with a wealth of experience gained in Arup consulting engineers and with a keen enthusiasm to highlight the positive contribution our sector can make to society in the years to come, while also responding to societal demand for the sustainable use of materials.

It is clear that simple solutions to complex problems rarely work in reality and our sector must be prepared to engage positively and in a balanced and informed basis with those who

claim that the replacement of concrete with less durable alternatives is the correct path for future construction practice. ICF welcomes the recent publication by the Department of Enterprise, Trade and Employment of guidelines on reducing embodied carbon in cement and concrete through public procurement in Ireland, which outlines the positive steps that the entire construction chain can take to reducing emissions. ICF also welcomes the publication by the Environmental Protection Agency (EPA) of national end of waste criteria for the production of recycled aggregates from construction and demolition waste concrete.

However, the limited uses for recycled aggregates permitted by the national criteria are a source of disappointment for our sector and we look forward to engaging further with the EPA to seek the necessary changes to enable a greater use of recycled aggregates in construction as soon as possible. ICF is also currently engaged in discussions with the Department of the Environment and other construction industry stakeholders on the classification and treatment of inert soil and stone within the waste hierarchy. There is a clear need for soil and stone to be seen as a resource which can be harnessed for sustainable uses such as the backfilling of quarry voids or as a potential supply of raw materials for construction.

As ever, the health and safety of employees in the industry is of the highest priority for the ICF. In May, ICF partnered with the Health and Safety Authority (HSA) on a safety campaign targeted at the management of contractors in quarries. Contractors play a vital role in the day-to-day operations of quarries throughout the country and are often small businesses, usually family based in nature.

The countrywide inspection campaign conducted by HSA inspectors concentrated on key safety areas of concern, including the management and supervision of contractors while on site, employer co-operation and co-ordination when sharing a place of work and ensuring that safe equipment is in use and that relevant personnel have appropriate qualifications when using machinery.

The campaign provided an opportunity for our members to review their procedures to ensure that there is effective communication between quarry operators and contractors and to ensure that contractors are fully aware of risks and safety procedures and rules in quarry workplaces. Tragically, there has already been a fatal accident in the current year in a contracting firm



#QuarrySafetyCampaign L-R: Gerry Farrell, Chief Executive, Irish Concrete Federation; Hilary Byrne, Senior Inspector, HSA; and Conor O'Brien, Chief Executive, HSA.

providing services to the quarry sector, which serves as a grievous reminder to all of us of the risks faced by employees in the sector daily and of our responsibility to minimise these risks to the best of our ability.

The imposition by Government of a levy on readymix concrete and concrete blocks in 'Budget 2023' was received with shock and disappointment throughout our membership. Thanks to the efforts of our membership and the support of many stakeholder organisations, the levy's impact has been negated to some extent, with the subsequent exclusion of precast concrete from its scope and its reduction to 5% of product value.

The administration of the levy has involved much consultation with the Department of Finance and the Revenue Commissioners over the past year. Unfortunately, the levy will lead to increased pressure on construction costs, at a time when Ireland's construction costs are among the highest in Europe. ICF will continue to represent the industry to seek the most efficient means of administering the levy, which regrettably is likely to remain a feature of the industry in the years to come.

The introduction of a Government subsidy for the spreading of agricultural lime to promote the achievement of optimum soil pH on Irish farms was a welcome announcement by the Minister for Agriculture and Food. However, in a similar vein to my earlier comments on the Irish weather, it is somewhat ironic that the introduction of the subsidy coincided with a 30% reduction in lime sales due to poor

land conditions, arising from high levels of rainfall over the past year.

Nonetheless, members of our lime producer association are confident in the outlook for lime usage as a carbon neutral fertiliser, which will play a major role in reducing emissions from the agriculture sector.

I hope that this contribution to the MPA (NI) Journal gives you a sense of the current work programme of the Irish Concrete Federation. Trade federations like MPA (NI) and ICF inevitably have busy and varied agendas, but with the support and drive of their members, can positively influence the environment in which the industry operates.

I would like to pay tribute to the members of trade organisations across all industry sectors for their willingness to go beyond the call of their own organisation for the betterment of their industry.

Finally, I would like to wish all readers a prosperous remainder of 2024 and I hope that you enjoy all of the contributions in this year's Journal.



MPA Family First

MPA and MPA Northern Ireland continue to work together as a family to address both global and local challenges.

When I joined the MPA team at the end of 2022, it quickly became clear that the mineral products sector is a close family represented across the UK by three distinct branches (MPA – covering England and Wales, MPANI and MPA Scotland). It was therefore pleasing to see the strong desire by all of our members to present a united front to decision makers whether they be in Westminster, Belfast or elsewhere, thereby ensuring a consistency of message that delivers a stronger impact. Inevitably, whilst the challenges that we face, whether they be economic, geopolitical or environmental, will be common, there will be local factors that will result in a spectrum of response. However, at the heart of our family is a shared desire to meet society's long-term needs in a sustainable and responsible manner.

We are all aware that international relations are more strained today than at any time since the 1962 Cuban missile crisis. We currently have live conflicts in Ukraine and the Middle East and a breakdown of relations around the South China Sea.

All of which negatively impacts on supply chains for food, tech and equipment and introduces uncertainty



*Jon Prichard, Chief Executive,
Mineral Products Association.*

into our energy markets, increasing cost for our energy intensive products.

The current economic conditions across the UK and Europe, from a mineral products perspective, are the worst that we have seen for nearly 20 years, and despite optimism from the Bank of England, they are creating hardship for many and some enterprises are struggling to survive. It is therefore all the more important that we work together and put the mineral products family first.

MPA has successfully been

lobbying Whitehall to ensure that members receive a fair deal on policy matters that apply across the UK as a whole, whether this is addressing emissions trading benchmarks or promoting the need to support industrial decarbonisation beyond the initial clusters.

But there is always more that can be done, such as asking the Westminster government to bring forward the timetable for the implementation of the Carbon Border Adjustment Mechanism (CBAM) so that it aligns with the EU timetable, to ensure that members can compete on a level playing field and that we are not flooded by cheaper imports that are not subject to green levies.

With a general election looming over us, MPA has also published succinct and clear advice on the sector's priorities (Decarbonisation, Growth, and Delivery) for the next Government with a bespoke version being tailored for parliamentary candidates in Northern Ireland.

During the COVID-19 pandemic, the MPA secured strong recognition for the essentiality of the sector, but it is a constant battle to remind decision makers that as new challenges emerge, the foundational role that our sector plays in the economy is not



**419 Million
Tonnes**

**Supplying the
nation's needs**

The vast production of essential minerals and mineral products, surpassing 1 million tonnes of materials daily



**2,300 Active
Sites and Plants**

**Delivering across
the nation**

Across the UK, an impressive network of 2,300 active sites and plants are working tirelessly to meet the nation's demands.



**£22 Billion
Turnover**

**Contributing to
economic prosperity**

The industry generates a remarkable £22 billion turnover directly, supporting many other industries along the way.



**£8 Billion Gross
Value Added**

**Providing a foundation
for the UK economy**

The £8 billion in gross value added in the industry serves as a pillar supporting 11% of the UK economy.

diminished, whether this is supplying the 419 million tonnes of materials to provide housing, schools, hospitals, or other critical infrastructure or simply directly supporting the employment of over 80,000 people.

Anyone working closely with the sector will be aware that the current planning and permitting processes are disjointed, too bureaucratic and costly, with some applications taking around three years from the initial submission. Many authorities do not possess or commit staff with the necessary skills to sensibly oversee the process.

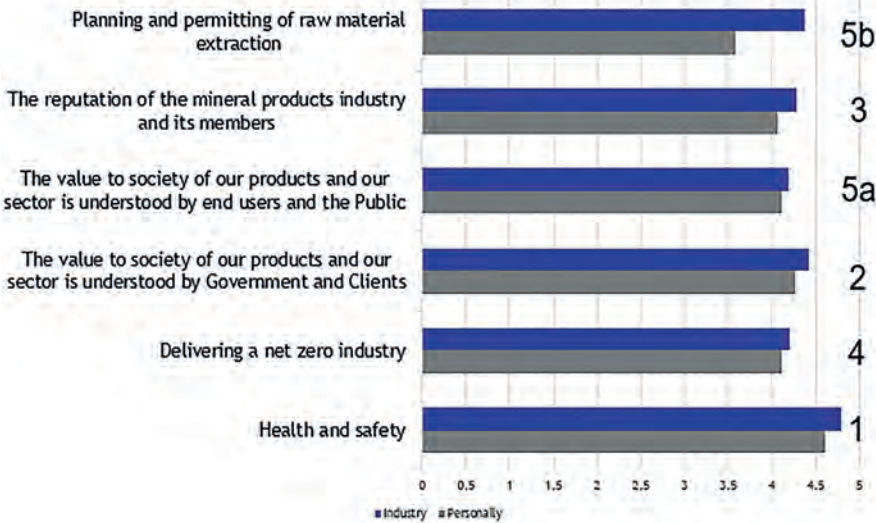
As a result, the rate at which Great Britain is replacing permitted reserves each year is too low (63% for sand and gravels and 52% for crushed rock) and will result in higher imports or product shortages within a generation.

We have the geology to be self-sufficient for essential minerals across the UK and MPA alongside MPANI will continue to make the case for well supported and resourced planning and permitting regimes to support resource replenishment and long-term growth.

We are also working with partners at Mineral Products Qualifications Council (MPQC) and the Institute of Quarrying (IQ) to encourage upskilling within the existing workforce and also to promote careers through the Minerals Matter initiative and we ask that every member plays their part in helping to promote the exciting lifelong career opportunities that exist right across the sector.

In November last year MPA, alongside a number of members, was represented at COP 28, where the cement manufacturers were given the opportunity to inform world leaders as to their progress toward Net Zero. Such events, provide an international platform to showcase the good works that we are all proactively taking to address climate change and improve the environment.

Top 5 Important Activities to Members



Both the UK and the EU have recognised the importance of nature recovery, and our sector is a key contributor that often exceeds the proposals describing the respective national ambitions. Many national bodies, such as the RSPB, fully support our work in quarry restoration. MPA is therefore keen to secure recognition for this success.

Earlier this year MPA undertook a member survey that asked producer members in England and Wales to tell us what they valued most. Unsurprisingly, as I am sure is the case in Northern Ireland, sharing H&S good practice came top of their list, both from an individual and a corporate perspective, with promoting the value of the sector and maintaining the reputation coming next.

The survey will now be used to inform the work being undertaken to update the current MPA Charter, which runs until 2025. At the same time, we will

continue to strive internally to improve our systems, so that we can improve the engagement and service that we provide to members and by extension, to the wider mineral products family in the devolved nations.

Throughout my early tenure at MPA, I have been greatly encouraged by the energy and enthusiasm shown by the sector to address the challenges that we face and have every confidence that by working together, and putting our minerals family first, the sector, as exemplified in Northern Ireland, will return to good health in better shape than before recent economic downturn.



£99,000 Labour Productivity per Worker

Outperforming the nation

An exceptionally productive workforce, with productivity 1.5 times higher than the UK average.



£178 Billion of Construction Output

Enabling our main customer to deliver

The industry is the largest component of the construction supply chain, building and improving housing and infrastructure.



80,000 People Directly Employed

A thriving workforce

The skilled individuals, who are driving the industry's success through their commitment and expertise.



3.2 million Jobs Supported in the Supply Chain

The multiplier effect

The industry supports an impressive 3.2 million jobs in its direct supply chain markets.

MPA Scotland

MPA Scotland continues to move forward representing the interests of its members during these challenging times. At the end of February MPAS held its annual lunch for members & guests. The event was well attended. Keynote speeches were provided by Jon Pritchard – Chief Executive MPA, Alan Mackenzie – Chairman of MPAS and also Kate Forbes MSP. In May of this year Kate Forbes was appointed Deputy First Minister and Cabinet Secretary for Economy and Gaelic.

Also in attendance at the event was Daniel Johnson MSP (Scottish Labour spokesperson for Business, Fair Work & The Economy) and Willie Rennie MSP (former leader of the Scottish Liberal Democrats).

At the lunch MPAS launched its 'Priorities for Scotland' document which focuses on the following key points;

- Scottish Aggregates Tax
- Decarbonisation of the industry
- Contribution to decarbonization of Scotland's economy
- Natural environment
- Planning and permitting
- The proposed establishment of a Scottish Minerals Forum

In this update from MPAS I would like to touch on two of the above, the proposed Scottish Aggregates Tax and our proposal for the establishment of a Scottish Minerals Forum.

In September 2022 the Scottish Government issued a consultation document on the proposed introduction of a Scottish Aggregates Tax (SAT) to replace the UK Aggregates Levy. It was initially intended that a Bill introducing the SAT be before the Scottish Parliament in the first quarter of 2023.

Following objections to the restricted period of consultation the Scottish Government, following calls from MPAS, established a Technical Advisory Group.

The TAG met on a number of occasions and considered all topics raised in the original consultation document. In addition to the TAG, MPAS has also had a number of meetings both formal & informal with the Scottish Government and Revenue Scotland. The Scottish Government and Revenue Scotland have positively responded to all requests for meetings, including those requested by Members.

The Bill [Aggregates Tax and Devolved



*Alan Doak MRTPI MRICS FIQ
Director, Mineral Products
Association (Scotland) Ltd.*

Taxes Administration (Scotland) Bill] introducing the SAT was introduced to the Scottish Parliament in mid-November 2023. The lead Committee within the Scottish Parliament for this Bill is the Finance and Public Administration Committee. It subsequently made a 'call for views' to which we responded. The Committee then decided to take oral evidence during March. MPA Scotland attended a meeting of the Committee to provide oral evidence.

Following the Committee's consideration of the Bill they published their Stage 1 Report on 29th April. They stated;

Overall, the Committee is supportive of the Bill's aims. However, we note the current lack of data available which poses difficulties in relation to setting the rate for the tax. Significantly more research and data are needed to establish the elasticity of demand and inform the rate-setting process in a way that will contribute to the aims

stated in the policy memorandum. We look forward to receiving the results of the survey currently being carried out, which will help to inform the decisions around setting the rate for the tax.

In response to the Committee's concerns, the Minister (Tom Arthur MSP) explained that the prudent approach taken in developing the Bill, of broad alignment of the SAT with UKAL, reflects the requirement for stability and confidence expressed by industry and the lack of data and ability to assess behavioural effects.

However, he emphasised the tax is "just one tool among many", sitting alongside regulatory interventions and policy approaches. As more data is gathered once the tax is introduced, there will be an opportunity for it to be further tailored to Scotland's needs and ambitions, alongside other devolved taxes.

Whilst MPAS are generally supportive of the Bill the devil will be in the detail as we move forward to setting the rate and as Scottish Government and Revenue Scotland gather further data from the BGS Survey and future SAT return forms.

It is worth noting at the outset that The Bill is designed to;

1. encourage the minimum necessary exploitation of primary aggregates
2. maximise the use of secondary and recycled aggregates, and
3. incentivise innovation and development of alternative materials

The Finance and Public Administration Committee, Stage 1 Report on the Aggregates Tax and Devolved Taxes Administration (Scotland) Bill notes that the Minister committed to working closely with stakeholders to inform the setting of the tax rate and noted that "stability and continuity will be important considerations as we initially devolve the tax".

The Bill aims to provide the legislative

framework for the operation of the tax and ensure “a proportionate and safe transfer of powers”, therefore allowing future Governments the opportunity to make decisions regarding the rate of tax, as more data becomes available.

The Committee stated they have reservations regarding the potential of SAT to incentivise the switch to recycled secondary products and reduce the use of natural products, as per the aims stated in the policy memorandum, without an increase in the tax rate above that currently charged, or broadening the use and classification of recycled aggregates.

The Committee further stated that data is needed in order to establish the tax elasticity and enable future governments to set an appropriate rate of tax that will achieve the stated aims while effectively managing the challenges and risks of behavioural change.

MPAS understand that the Scottish Government propose to undertake much needed further research into recycled and secondary aggregates. We welcome the proposed ‘Evidence review on the role of alternatives to primary aggregates’.

We understand that the research is intended to develop the evidence base on policy objectives 2) and 3), providing a systematic overview of the evidence on the potential role of recycled aggregates and alternative materials. It is proposed the research will summarise the range of recycled aggregates, and other alternatives to primary aggregates, available in Scotland, their use and scale of application in the UK and internationally, any barriers to their use in Scotland, their effectiveness in reducing emissions and how their use can be increased, in particular through fiscal levers such as the Scottish Aggregates Tax and Scottish Landfill Tax.

This research needs to fully understand the existing availability of recycled and secondary aggregates, future availability of these materials (in light of other Circular Economy objectives such as reuse of buildings rather than demolition), geographical location of material and ability to serve markets, impact of transport to market, quality of materials, longevity of product, acceptability to design engineers and insurers.

MPAS will look to play an active role in this research exercise.

The Stage 1 Report was debated in the Scottish Parliament on 16th May. The Bill received general support from

across the floor of the chamber, a few of the Committee members spoke regarding the lack of available data and the need to have a better understanding of recycling & secondary materials, the ability to use fiscal powers to encourage behavioural change was also raised etc.

The industry (and MPAS) and the role it plays within the economy did receive support from MSPs from all parties. Both Fergus Ewing MSP and Daniel Johnson MSP (Labour spokesperson for Business, the Economy and Fair Work) supported the establishment of a Scottish Minerals Forum. Willie Rennie MSP (former Liberal Democrat leader) also spoke of the importance of the quarrying industry within his constituency.

MPAS will continue to monitor the Bill as it progresses through the various stages of the Scottish parliament process and continue to engage with Revenue Scotland on its proposed implementation.

With regard to our proposal for a Scottish Minerals Forum. The Scottish mineral products industry, Scottish Government and others could collaborate more closely.

MPA Scotland would be keen to see a Scottish Minerals Forum established, looking at forward planning and reserve replenishment as well as assisting in the cost effective and sustainable delivery of key infrastructure projects.

Such a Forum would provide improved dialogue between our sector and across the range of Government and would provide an opportunity to consider further recycling opportunities.

With the new British Geological Survey research currently underway, this forum would be a good way to ensure the sector can be fully engaged in decisions that affect its future and importantly its contribution to the Scottish economy.

The Technical Advisory Group is a great example of collaborative working. We would like to take this spirit forward to establish a Scottish Minerals Forum to recognise the strategic importance of minerals in their own right to the delivery of these key essential projects.

This would help deliver all the projects Scotland needs our products for and to maximise our contribution to Scotland’s economy and environment. It would help engage the whole supply chain, and I really believe could help unlock what our industry can do for Scotland.

In addition to the above MPA Scotland continues to monitor the significant number Scottish Government consultation documents issued and also consultation documents from other key stakeholders.

Indeed, in the last 3 months alone we have responded to the following Scottish Government consultation documents;

- “ Scotland’s Circular Economy & Waste: A Route Map to 2030
- “ Proposed changes to Environmental Authorisations (Scotland) Regulations 2018
- “ Climate change - draft Scottish National Adaptation Plan 3
- “ Investing in Planning - A consultation on resourcing Scotland’s planning system and SEPA consultation;
- “ Proposed Amendments to Environmental Authorisation (Scotland) Regs 2018

Indeed, MPAS is also currently engaging with Nature Scotland as it considers the development of a standard matrix for considering Biodiversity Net Gain, a key issue going forward.

MPAS continues to be outward looking and seeks to engage with all relevant stakeholders through liaison meetings or invitation to our committee meetings.

MPA Scotland recognises the benefits of a close working relationship with MPANI as well as across the wider MPA family.

As part of that engagement MPA Scotland look forward to continuing to develop our relationship with MPANI for the benefit of our members through sharing experiences relating to devolution, intelligence and ideas on all of the above - looking to the future with regards infrastructure investment and devolved local taxation implications and continually seeking ways for better collaboration with our stakeholders in efforts to drive out more efficiencies.



Messages from our Partners



CIAT is a dynamic, forward-thinking and inclusive membership qualifying body for Architectural Technology.

It exists as a not-for-profit organisation to lead, represent and promote Architectural Technology and to set and maintain the standards for education, practice and professionalism.

We continue to work on some very real challenges; those which affect the discipline, the industry and society in the UK and globally. All of this work demonstrates the vital importance of a partnership approach between all of us working within the built environment sector, the wider business community and governments to see Northern Ireland move forward alongside all the other nations.

The UK's actions on key issues such as net zero and building safety must be dramatically expedited so we can produce healthy, safe and sustainable communities. In the wake of the Grenfell Tower tragedy, the inquiry into the poor construction of Scottish schools, and RAAC in public buildings, competent built environment professionals are more important than ever, and for the UK to compete on a global scale, we need to address the skills shortages in our sector.

More needs to be done to promote energy efficiency measures, incentivise the use of renewable

energy sources, and invest in sustainable infrastructure projects. Tighter regulation must be implemented to achieve our Net Zero goals whilst also being mindful of the financial impact. Cost should not prohibit the implementation of robust measures or create a situation where the affordability of solutions restricts sector growth, but it is imperative that the broader impact of climate change is addressed. While the design and delivery of sustainable new social and economic infrastructure are integral to best practice, retrofitting is one of the most effective ways to improve energy efficiency and reduce carbon emissions in the built environment. With 80% of today's built environment expected to still be in use in 2050, there is an urgent need for existing structures to be retrofitted to comply with modern standards to meet the needs of society. Retrofit measures are pivotal in reducing carbon emissions and meeting the UK's climate targets, and have the added benefits of lowering energy bills, thereby mitigating fuel poverty and enhancing living standards for occupants.



Eddie Weir PCIAT
PRESIDENT, CHARTERED INSTITUTE OF
ARCHITECTURAL TECHNOLOGISTS

CIAT's Principal Designer Register will enable its Chartered Architectural Technologists to demonstrate competence in compliance with legislation, but more centralised support must be provided to aid professionals in terms of upskilling and maintaining currency of their knowledge and skills through continuing professional development. If the UK wants to lead on key issues such as net zero and promote a built environment that other nations can learn from, then the Government must nurture talent and promote accessible routes into Architectural Technology and the wide range of built environment disciplines and specialisms that are essential to the success and prosperity of our built environment and our country. The built environment plays a crucial role in how people understand and value the world around them and Architectural Technology is at the core of this.



The Construction Industry is a true example of a circular economy. For it to work best, there needs to be a close alignment between its composite parts.

This means at both policy and practical level, cooperation is essential between the supply chain, designers, contractors and clients.

The Federation of Master Builders, FMB, strongly values the relationship with MPANI and its staff. In providing direction and a desire to be solution focused MPANI set a fine example of collaboration. During very challenging times over

the last few years, both Gordon and Fiona have played important roles in keeping relationships and communication going across Industry and with stakeholders.

The NI Construction Group has remained a valuable network to share good practice, discuss common issues and promote communication with key Government Departments. Its always encouraging to see the research and innovation of many



Gavin Maguire
REGIONAL DIRECTOR, FEDERATION
OF MASTER BUILDERS

MPANI members in driving forward change for the better and moving towards low carbon targets.

We want to wish MPANI continued success and look forward to working together in the future.



The Concrete Society
Established in 1966

The Concrete Society is a member-based body, with no affiliation to any Trade or Corporate Organisations and is proud to be recognised as independent.

The Society is built on a technical base and has become a leading provider of information serving the needs of Clients, Architects, Engineers, Specifiers, Suppliers, Contractors and users of concrete.

The Concrete Society's independent Concrete Advisory Service provides prompt, impartial technical advice on concrete and related matters to subscribing members. Their Chartered Engineers have vast experience in all aspects of the use of concrete.

In recent years many construction industry technical events throughout the UK and Ireland have increasingly focused on reducing our carbon footprint and the concrete industry is no exception. It has been widely publicised that the cement and concrete industry is a large producer of CO₂, and we need to change how we work if we are going to hit our climate change targets.

If you go to any concrete event you will have likely heard this statement being made "behind water, concrete is the second most consumed material on the planet". Concrete is the backbone of infrastructure so without it we wouldn't have, hospitals, schools, bridges, dams, flood defences and so on. Therefore, even if we wanted to, we simply couldn't stop producing concrete without devastating consequences to the way we work and live. We need to find a solution.

Products that we have been using to date to reduce our Carbon Footprint such as Ground Granulated Blastfurnace Slag (GGBS) and Pulverised Fuel Ash (PFA) have become scarce as our resources

dwindle. So much so it is very likely that in the near future these products may only be used for specialist projects using their unique properties for controlling heat of hydration and improved sulphate resistance.

It is clear there is no one solution that will solve everything, there is no magic answer. Therefore, we need to explore every avenue possible if we are going to reach our target of net zero.

The good news is new solutions are being explored and worked on as we speak. Things such as the use of calcined clays as binders. Tremendous work has been done so far on research and development and the latest release of BS8500 has incorporated many alternative cement types for general use.

However, the reality is that very few have used calcined clays on full scale projects and we are years away from having these as off the shelf binders we can go out and buy. The same goes for geopolymers. Again great research work has been done to date but at this stage you can't go and supply a standard concrete project with this material as its not readily available at a commercial viable price.

Carbon capture from cement production promises to be one the vital areas of reducing our CO₂ and although significant work has been done on this, it will take billions of pounds of investment to scale this up and have it implemented with costs so high that only government funding can drive this forward to a workable solution.

Structural engineers are also looking at how they use concrete



Neil Cooke BEng MSc MICT
CHAIR - CONCRETE SOCIETY NI REGION

more efficiently in their projects. For example increasing cover to steel can reduce the water/cement ratio and minimum cement content requirements for concrete exposure classes, reducing the binder content of the produced mix.

The use of high strength concrete in places can reduce the amount of overall concrete needed which also reduces deliveries, taking lorries off the road. Highly flowable concretes reduce the amount of compaction required on site saving energy and so on.

The solutions are out there so we need to push the industry to use concrete better. From the design of our projects to how we specify, make, deliver and use our concrete. Investment is required to have these solutions scaled up so they can produce the amount of concrete we require. We need to be brave, not just refer to type and go for the cheapest option. But above everything we need to work together as an industry to drive this forward.

Membership of the Concrete Society is open to anyone with a construction interest and free to students. We would be happy to hear from anyone wishing to find out more information or wishing to join. www.concrete.org.uk
The NI Region of The Concrete Society looks forward to continuing our close partnership with the MPANI, for the benefit of all our members and as importantly, the wider construction industry in Northern Ireland.

CEF CONSTRUCTION EMPLOYERS FEDERATION

In our role as the sole certified representative body for the second largest industry in Northern Ireland, the construction industry, the Construction Employers Federation has been a strong ally of and advocate for the work and members of Mineral Products Association Northern Ireland for many years.

That work, as we move beyond the recent UK General Election and now begin to assess how its outcome will affect the economic and financial landscape for the Northern Ireland Executive over the coming years, remains crucial as we continue to advocate for our industry and its people.

As we look ahead to the remaining two-and-a-half-years years of this NI Assembly mandate and beyond, our organisations share a number of key areas of focus in our work: Public service reform to include the delivery of fundamental reforms to the funding and governance models of NI Water and the NI Housing Executive by means of the mutualisation of both. Introduction of a Planning Bill to address key areas of constraint with our existing planning process – notably the need for statutory timeframes within which statutory consultees must respond to major and regionally significant applications and the introduction of deemed consent where this doesn't happen.

Agreement of a NI Executive Housing Supply Strategy which sets an ambitious target of completing a minimum of 10,000 new homes for each of the next 15 years to meet our housing need. Putting in place multi-year capital budgets which would also include agreement with the Treasury regarding enhanced end-year flexibility and ringfenced capital funding for specific areas of investment. Building on the Irish Government's commitments in the New Decade, New Approach deal and leveraging further investment. Delivery of a pipeline of public sector works that the industry can have confidence in. Collaboration between industry and government clients to ensure the best and most appropriate forms of contract are used for public works. Support for our recently established company, Construction Futures, so that a new partnership between education, government and industry is created to ensure NI has a



Mark Spence
MANAGING DIRECTOR, CEF

pipeline of talent to meet our long-term infrastructure challenge. Agreement of a significant package of measures to enable the drive to net zero that must include a funded and ambitious housing retrofit strategy. Establishment of an independent Infrastructure Commission for NI to ensure better long-term decision making and planning. Working together, the MPANI and the CEF, will look to maximise our industry's voice as the NI Executive finalises and publishes its Programme for Government and Investment Strategy as well as other key deliverables – perhaps most notably the long overdue clarity needed on long-term plans for our road, active travel and public transport infrastructure in which many of our joint members play such a crucial part. The coming period is therefore a critical juncture for our industry and it is one where our collective, united voice will be crucial.

IQ The Institute of Quarrying

I have been a Member of the Institute of Quarrying from my time working for Moffatts Drumquin Ltd, Tarmac, A&G and now Kilwaughter Minerals, it's a great honour to serve its members as Chairman.

Like our last Chairman Pat O'Connor, who passed away in December 2022, I have worked in the Quarry Industry a long time, and there are still improvements to be made in Health & safety, mental health, Environmental, Training and Technology. And the age profile within the Quarry Industry. And as always the MPANI and the IoQ have been at the forefront for these challenges. The industry has had its challenges over the years, fuel prices, availability of materials, parts and the cost of living for our work force. But hopefully with a restored Assembly and Executive we will see increasing

budgets, spending the public money better. Making this wee part of the world a better place for our young folk. Our Purpose should be to add value to people's lives through high performing solutions, investing in our people, our communities and delighting our customers. The Institute of quarrying vision is to set standards in education for its members, promote the positive impact of the industry, support the industry in driving healthy sustainable workplaces and drive innovation and operational best practice. We have many challenges ahead in the next few years, like our journey to net zero, working in partnerships with our suppliers and customers and other stakeholders



Edward Nethery
CHAIRMAN INSTITUTE OF QUARRYING
NORTHERN IRELAND BRANCH 2024.

and I'm sure we will adapt and rise to the challenges. I would like to thank all our members for their support in our schedule events, tech branch meetings, the golf day and the stone crushers ball. This year we have a field trip in September to Glemsanda Scotland. Like to thank the committee of the institute of quarrying for their work and support. As Chairman of the IoQ we continue to work with and support the MPANI committees, Regional Director and the administration team for the good of the industry and our customers.



The Institution of Civil Engineers (ICE) represents 2,300 members in Northern Ireland, and some 97,000 globally. Our purpose is to improve lives by ensuring the world has the engineering capacity and infrastructure systems it needs to allow our planet, and those who live on it, to thrive.

After another lengthy period of political vacuum here, many of us have found ourselves cautiously hopeful as the NI Executive and Assembly returned earlier this year. Many in the infrastructure sector have dealt with significant challenges over the past four years, steadying ourselves against repeated external and internal 'shocks', which have impacted our work and our wellbeing. As has always been my experience, I have been hugely encouraged by the collective work of our industry representatives, pulling together to provide advice and expertise to our colleagues and to infrastructure stakeholders. We are still grappling with the ripple-effects of recent events, and will, no doubt, face more challenges in due course. All this against the backdrop of the climate crisis, where it seems that every week brings more stark

information and worry. Despite this, I know that our sector is doing incredible work to drive progress in meeting our net zero obligations – we have some incredible people working, often behind the scenes, and making a tangible difference. Much encouragement needs to be given to the mineral products sector, who have made huge strides forward in the last few years. As well as pushing towards net zero, we see also the need to ensure our infrastructure is resilient to the effects of the changing climate – we have all seen the increasing intensity and frequency of storms during our winter periods, and the effects of this on people, their livelihoods and their mental health. Working with experts from across the construction and infrastructure landscape, the ICE has recently published a report, Resilient infrastructure for Northern



Jenny Green
MEng CEng MICE MStructE
REGIONAL DIRECTOR, ICE NORTHERN IRELAND

Ireland, which has been shared with stakeholders and the Infrastructure Minister, John O'Dowd MLA. We will continue to support the work of our colleagues in other bodies to ensure that fundamental issues like this are brought to the forefront of the infrastructure agenda. The ICE will continue our vital partnerships with MPANI and other industry expert bodies as we address the significant and continuing challenges our sector and society face. We must all work to support government decision-makers by ensuring they can and do access our sector's expertise, as they face budgetary challenges and the ongoing need to deliver the necessary outcomes.



This year marks the 60th anniversary of CIHT in Northern Ireland, with the inaugural meeting of what was then the Institution of Highway Engineers taking place on 11th November 1964, and we continue to serve our members and play a role in representing the broad range of views on transportation in the region.

As a Region, we have always 'punched above our weight' within CIHT with the 2023-24 President, Karen McShane, being the fifth from the Northern Ireland Region – following on from Harold Scott, Billy McCoubrey, Ronnie Porter and Geoff Allister. Over the 60-year period that CIHT has been active in Northern Ireland, there has been more than 200 major road, rail and bridge projects delivered across the province. Other public transport improvements include the CIHT award-winning Glider in Belfast, the ambitious and award-winning North West Hub in Derry-Londonderry and last, but certainly not least, the currently on-site

Belfast Grand Central Station. When complete, this project will deliver a world-class integrated transport hub, the largest transport facility on the island of Ireland and will be a transformational project for Belfast and Northern Ireland as a whole. Locally in Northern Ireland it has been a positive step to see the local Assembly functioning and Executive Ministers back in place to allow difficult decisions to be taken in order to meet the significant challenges that remain if we are to encourage the economic growth and prosperity of the Region. With a UK General Election likely in the not-too-distant future, the recent launch of the CIHT Manifesto, 'A transport network fit



Michael Bell
OUTGOING CHAIRMAN,
CIHT NORTHERN IRELAND

for all our futures' calls on decision makers to change the way we look at our highways and transportation networks. CIHT believes an effective transport network supports economic activity, social well-being and can work towards net zero and considers that the new manifesto outlines a policy pathway to support real change. CIHT recognises the contribution MPANI members continue to make to the highways and transportation sector and look forward to continuing our partnership in future. We would also like to thank Gordon Best and MPANI for their continued support of CIHT Northern Ireland.



The Concrete Society is a member-based body, with no affiliation to any Trade or Corporate Organisations and is proud to be recognised as independent.

The IAT is the Professional Body for persons working in the field of Asphalt Technology and for those interested in all aspects of the Manufacture, Laying, Technology and Uses of materials containing Asphalt or Bitumen. Our 9 regional branches in the UK and Ireland run regular seminars, site visits, professional development events and training days to keep the membership abreast of contractual, engineering, materials and plant design changes. Technical events are often shared with sister institutions or neighbouring Branches. Road maintenance, or lack of, continues to hit the headlines throughout both Great Britain and Northern Ireland on a regular basis. "Pothole Britain" is a term regularly seen in national news articles while at a local level, announcements of relatively small amounts of additional road maintenance funding are often enough to make the news. Financial pressures on local authorities

continue to be inadequate to maintain our network to the standards required. The challenge for the suppliers and contractors in our sector always seems to be to be one of balancing income with that of reducing carbon, developing products and investing in plant and equipment. As a membership organisation, the IAT contends that the key asset of this industry is our people and the focus should be on attracting and retaining skilled workers at all levels, whether that be asphalt labourers, drivers, technicians, or supervisors. However, I am glad to say that a collaborative effort by MPANI, CITBNI and IAT over the past year has delivered a second cohort of VQ Level 4 for Highways Site Supervisors. Congratulations to the individual candidates and to their employers for investing in their people. IAT continues to offer other Vocational and Professional qualifications to our members and industry, as well as a range of asphalt specific distance learning courses delivered



Lyle Andrew FIAT FIHE
EXECUTIVE DIRECTOR, THE INSTITUTE
OF ASPHALT TECHNOLOGY

in partnership with the Institute of Quarrying and University of Derby. Our CPD events, both online and at Branch level, are available to non-members and our "Student" grade of membership is free of charge for those studying a relevant full-time or part-time course.

Support for MPANI

The notable efforts of MPANI representing our supply chain along with the collaboration of the various trade and professional bodies continues to promote and enhance the interests of our sector. Thank you to Gordon Best and MPANI for their continued support to the NI Branch of The Institute of Asphalt Technology and we look forward to any opportunity to help improve the quality, standards and learning within our Sector.



On behalf of Actuate UK Northern Ireland I would like to congratulate Gordon and his team at MPANI for another excellent publication.

Actuate UK - the engineering services alliance - is the umbrella body for UK engineering services. It brings together the leading trade, technology and professional bodies within the multi-billion-pound sector: Electrical Contractors Association (ECA) Building Engineering Services Association (BESA) Lift and Escalator Industry Association (LEIA) Building Services Research and Information Association (BSRIA) The Chartered Institution of Building Services Engineers (CIBSE) The Federation of Environmental Trade Associations (FETA)

We speak with a single, shared and authoritative voice to affect positive change in the built environment. We represent the wider engineering services sector in the built environment with one shared voice. Actuate UK are active in the devolved nations and aims to work in partnership with sector bodies operating solely in those nations. Actuate UK represents the interests of the sector on four key issues: the post-Covid world of business; Hackitt – post-Grenfell competence and compliance; climate crisis and net zero target. Actuate UK NI work closely alongside Gordon and the Suppliers Group on the Northern Ireland



Alfie Watterson
EXECUTIVE OFFICER, ACTUATE UK
NORTHERN IRELAND

Construction Industry Group (NICG) and other Industry Sector Bodies. The return of the Northern Ireland Executive and functioning Assembly is warmly welcomed by the Northern Ireland Construction Industry, and we look forward to working with Ministers and MLA's in delivering a sustainable Construction Industry for all sectors. I look forward to working with Gordon and Fiona on the various industry groups that we represent our respective sectors on throughout 2024 and into 2025.



Northern Ireland businesses need firm action from both Westminster and Stormont.

The CBI's Business Manifesto, published in the lead-up to the recent Westminster election, emphasises long-term solutions over short-term headlines, if we are to unlock the UK's long-term potential, redefine the growth trajectory, and establish a sustainable path for the economy.

With a new Executive now firmly in place, CBI NI urges politicians in both London and Stormont to focus on practical solutions rather than political posturing. Economic growth relies heavily on investment in some key areas - but skills and infrastructure are top of the list.

Addressing the labour shortage is crucial if the UK economy is to succeed and the CBI is advocating for an honest conversation about immigration's role in meeting workforce demands. We have proposed a cross-Whitehall review of the immigration system's effectiveness as well as reform of the Migration Advisory Committee to ensure representation from all UK regions and nations. Additionally, the CBI is calling for a new remit for the Low Pay Commission to ensure minimum wages support productivity and affordable pay rises. At the local level we are also working hard with our sister organisation in Dublin (Ibec) to encourage governments in Ireland and the UK to collaborate and resolve labour mobility frictions that have emerged in our post-Brexit world.

CBI members want to see the NI Executive progress investment in key infrastructure projects including the

development of a sustainable funding model for water and significant investment in the electricity grid. We welcome the work that has been done to date on the development of the Investment Strategy for NI (ISNI) and the establishment of the Executive's governance arrangements to oversee the delivery of the strategy.

For local firms, the bottom line is always about delivery of these infrastructure projects, but it is fair to say that a degree of optimism has returned now that we have the Executive back and Ministers in place to drive progress.

CBI NI also continues to advocate for changes to the planning system through our representative in the interim Regional Planning Commission. Our ask is an efficient and effective planning system which will provide clarity for investors within an agreed and established timeframe. This is crucial in ensuring that NI can meet its commitment to net zero carbon emissions by 2050. Northern Ireland has the longest timelines across these islands for renewable projects to achieve planning consent and this needs to be reduced.

To achieve our climate targets and to accelerate green growth, the CBI UK has also called for the creation of a Cabinet Office-level Taskforce for Net Zero Delivery to ensure strategic and coordinated delivery of net zero policies in the devolved administrations, as well as the UK overall.

For example, this would help with



Angela McGowan
DIRECTOR CBI NI

the synchronized roll-out of electric vehicle infrastructure, a key priority for some CBI NI members. The economy also needs net zero 'champions' in our most strategically important industries to demonstrate successful decarbonisation technologies and we need sectoral roadmaps to progress the transition to a net zero economy.

The Ibec/CBI Joint Business Council recently published a 'All-island Business Policy Priorities' paper which outlines the key asks from firms operating on an all-island basis. These include investing in essential infrastructure and connectivity and building a low-carbon economy. We also advocate for a Joint North-South Infrastructure Committee to monitor and prioritise all-island infrastructure projects.

Success will be ensured if we concentrate on the delivery of the projects that bring most economic benefit such as the A5 North-West transport corridor, the North/South Electricity Interconnector and the Belfast/Dublin train service along the N-S economic corridor.

Ultimately, North-South and East-West collaboration between politicians and business is essential for reshaping Northern Ireland's economy and achieving shared ambitions to raise economic growth and local living standards.



The drive for sustainable building materials.

As the only trade association representing merchants, manufacturers and suppliers in the UK and Ireland, the BMF (Builders Merchants Federation) is well placed to help accelerate the transition of the industry to more sustainable building materials and operational practices in the drive to achieve net zero.

The BMF was one of the first organisations to support the Construction Leadership Council's CO2nstructZero initiative, a cross-industry approach to drive carbon out of all parts of the construction supply chain by 2050. BMF members were in the vanguard to become CO2nstructZero Business Champions, with 33 committing to targeted carbon reduction and to provide details of how they are achieving this to help others on their journey.

Across the BMF's 950 members, however, the level of engagement in the sustainability agenda varies considerably, with many looking to the BMF both to help promote greater awareness and understanding of the need for merchants and their customer groups to adopt more sustainable materials, and for shared industry approaches to sustainability.

The BMF Sustainability Forum and the BMF Sustainability Working Group, are two practical ways in which we are supporting members,

wherever they are on their journey.

To establish the current state of sustainability in the building materials sector, the BMF Sustainability Working Group commissioned a major research report. Over 150 companies took part in the research, which established a baseline to measure progress, as well as identifying the barriers that could slow the transition. The survey will be repeated annually across the UK and Ireland, to encompass a larger cross section of the sector each year.

The research revealed just how complex the issue of sustainability is in the sector. The main findings highlight the differences between merchants and suppliers in their attitude and adoption of sustainable materials and practice.

Whereas 78% of suppliers place sustainability in their top three business priorities and are leveraging it as a strategic growth driver, only 45% of merchants currently afford it the same high priority. Company size also has a bearing, with the importance of sustainability increasing as turnover rises.

The progressive tightening of legislation around sustainability is driving many suppliers to take advantage of the commercial window of opportunity available to innovators before legislation requires the same standards from all. Suppliers were



Leo Bagnall

CHAIR OF NI CONSTRUCTION GROUP

more likely to have an in-house sustainability resource with 85% having at least one person in place compared to 64% for merchants. Those with an in-house resource were more likely to view sustainability as an integral part of their business strategy.

Merchants are more likely to view sustainability in terms of mitigating risk and complying with regulation, with a higher proportion of merchants adopting a "wait and see" approach. The biggest barrier for many is their belief that price-sensitive customers are unwilling to pay more for sustainable products. Merchants also cite low customer awareness of the need for sustainable materials and a lack of clarity as to what makes a product more sustainable.

The BMF sustainability working group, chaired by Giles Bradford and comprising some of the leading sustainability experts in the sector, is now moving into a new phase where we can tackle the issues head on, using the research to guide us. Supply chain collaboration will become increasingly essential for creating industry wide standards, best practice, information, training, forums and marketing materials.



Ciarán was appointed Director of RSUA in June 2015 after 10 years with the Construction Employers Federation (CEF).

RSUA is a charity dedicated to improving the built environment through good architecture. It is also the professional body for architects based in Northern Ireland and is in alliance with RIBA.

RSUA has approximately 1,000 members. Ciarán is a former chair of the Northern Ireland Construction Group and the current chair of Climate NI. He also sits on the Construction Industry Forum for Northern Ireland.



Ciarán Fox

RSUA DIRECTOR



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GO GREEN WITH COLAS

Gearoid Lohan, CEO of Colas Ireland, recently launched a “Go Green with Colas” initiative to encourage all Colas subsidiaries to play a more pro-active role in meeting their environmental responsibilities – and to raise awareness with our many customers and stakeholders of how Colas Ireland can help them meet their carbon reducing targets. This initiative is a direct response to the state of climate and biodiversity emergency that we now find ourselves in. (Yes, we were in the midst of another emergency before the COVID-19 pandemic took hold – and still are.)

Since its establishment over 70 years ago, the Colas Group has led the way in the development of environmentally friendly “cold” applied pavement materials. In fact, the name Colas comes from the words COLd ASphalt. Cold-mix asphalt, as it is now called, is similar to the more commonly used “hot-mix” asphalt but is made using a bitumen emulsion instead of the conventional hot bitumen. As bitumen emulsions can be used with aggregates at ambient temperatures, as opposed to the high temperatures required to manufacture hot-mix asphalt, there are considerable energy and, hence, carbon savings to be achieved by their use.



In situ pavement recycling with bitumen emulsion

Colas first introduced cold-mix asphalt to Ireland in the 1980's and in 1990, a cold-mix asphalt called “Grave-émulsion” was used in the base course of a 40 km section of the N8 from Dublin to Cork. Its still there! Since then, Colas Ireland has led the development and promotion of other emulsion-based materials and techniques such as surface dressing, cold-asphalt micro-surfacing and in situ pavement recycling.

In addition to being a cold technique, in situ cold recycling is one of the most environmentally sustainable and low carbon maintenance techniques, as use is also being made of the aggregate material already on site. Consequently, there is less use of this valuable resource and there is less or no transporting of aggregates from a quarry or asphalt plant to the jobsite. In addition, the bituminous binder already present in the pavement can also be recycled.

Much of these developments have been made possible thank to Colas Ireland owning and operating its own speciality chemicals company in Oranmore, Co. Galway. Chemoran's range of emulsifiers and bitumen additives enables Colas subsidiaries worldwide to design their emulsions and asphalt mixtures to best meet their customers' needs. Chemoran's bitumen additive called CWM™ has been used for the production of over 7 million tonnes of warm-mix asphalt worldwide (with mixing temperatures 35 °C lower than that of hot-mix) and its adhesion agents extend the service-life of hot-mix asphalt by improving the bond between the binder and the aggregate and, hence, its durability.

For further information on how the Colas Ireland group of companies can help you to reduce your carbon footprint, please find your local representative at www.colas.ie or at info@colas.ie.



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Hopes that restoration of NI Executive clears roadblocks for Northern Ireland

Northern Ireland's mineral products industry is critical to the economic prosperity of Northern Ireland employing around 5,600 people and contributing £650 million to NI GDP. A significant number of our own members are directly involved in ensuring that mineral products are delivered safely and efficiently from source to end user.

Many of the challenges faced by both sectors are similar and there is hope that with restoration of the Northern Ireland Executive and Assembly, they can now be addressed effectively. Investors and businesses need certainty and stability, and with the return of a functioning Assembly, the logistics industry feels like one of the biggest roadblocks to addressing challenges facing the sector has been removed.

Our members are hopeful that the economy can now start to move forward with greater confidence and, on behalf of the industry that moves the goods and mineral products that NI relies on every day, we welcome the return of locally elected and accountable Ministers, who we are already working with, to find solutions to the key challenges faced by our industry.

Current challenges facing our sector include decarbonisation, the delivery of key infrastructure projects skill shortages, and the increasing cost of doing business in Northern Ireland. While these are not new issues for the industry, now that a working Executive has been re-established, our members hope to see genuine progress from the Executive and government in Westminster to address these challenges and unlock our sector's potential.

Decarbonisation - fair transition to a green economy

Logistics businesses across NI are already working hard to decarbonise their operations but a lack of certainty,



clear direction and fiscal support and incentives from the UK government continues to hamper progress. We see this with the ongoing delayed publication of the Low Carbon Fuel Strategy. As an industry we need certainty when it comes to the supply of affordable alternative fuel sources.

We also need certainty on the vehicles and technologies that the UK government is backing so companies can make the necessary investments with confidence – these are not insignificant sums

of money and logistics businesses, often already operating on tight margins, cannot afford to spend on the wrong technology.

Genuine decarbonisation must be underpinned by an agreed roadmap to phase-out fossil fuels, based on the availability of affordable fuel, technology, infrastructure investment, regulatory reform and tax incentives.

We need to look at all ways to achieve net zero, not just focusing solely on road-based solutions, and increasing rail freight provision, as set out in the All-Island Strategic Rail Review, also needs to be seen as fundamental to achieving this goal, alongside changing consumer behaviours.

A successful transition to net zero will need partnership working across these islands between the Northern Ireland Executive, the UK government, the Irish government and the logistics industry which drives the economy and keeps goods moving.

Key infrastructure projects

Now that the government has been restored, we look forward to working with the Executive regarding the delivery of key strategic infrastructure projects.

Developments such as the A5, York Street Interchange, upgrade of the A1, the Newry Southern Relief Road and completion of the A6, which have been in progress for some time, will save lives, boost the whole economy and are essential to ensure the smooth and efficient movement and delivery of the goods we all need in our homes, schools, hospitals, shops and factories.



Workforce Challenges

Skills shortages continue in key roles across these islands and our members cite shortages in the numbers of technicians and dual role drivers available to work as a problem which could hamper their ability to operate efficiently.

Recruitment for these careers must remain a priority to keep the supply chain moving efficiently. Careers in logistics must be backed by reform to the curriculum and to skills funding and the Apprenticeship Levy in particular.

The long running and unacceptable situation in Northern Ireland, where businesses pay into the Apprenticeship Levy but cannot draw funding down, must come to an end.

Alongside offering a range of apprenticeships, we still need to ensure businesses are attracting people from all walks of life and are able to provide flexible training opportunities so that logistics businesses have a strong and diverse pipeline of talent to draw from and nurture to protect the long-term security of the workforce.

On behalf of our members, we will continue to work with the Northern Ireland Executive to try to secure this reform and are seeking the support of the Executive in helping to showcase our industry, attracting a new generation into our sector and the many exciting and rewarding careers it offers.

The rising cost of doing business

The logistics industry has had to absorb a number of shocks in recent years including Brexit, the pandemic, war in Ukraine, price energy shocks and ongoing trade diversion away from the Red Sea. By our very nature as an island, logistics businesses here in having to cross the Irish Sea, face additional costs compared to their counterparts in GB.

As the Executive considers revenue raising proposals at its disposal, it is crucial that the burden does not fall on already hard-pressed businesses. The removal of business rates relief or a further increase in rates on top of higher operating costs will squeeze business' ability to innovate and decarbonise and will ultimately put the north at a competitive disadvantage.

The restoration of the Northern Ireland Executive brings with it a palpable sense of opportunity to kickstart economic growth. The transport and storage sector added £1.4 billion to the NI economy in 2021.

There are over 6,000 logistics businesses and over 65,000 people employed in logistics roles across the north, all essential for the movement of goods within, to, and from Northern Ireland.

Addressing the key challenges facing the logistics sector is within reach and solving them will boost the whole

economy. Logistics UK will continue to work with stakeholders on both sides of the Irish Sea to ensure the sector receives the recognition and support its contribution to the economy warrants and deserves.

Logistics UK is one of the UK's leading business groups, representing logistics businesses which are vital to keeping the UK trading, and more than seven million people directly employed in the making, selling and moving of goods.

With decarbonisation, Brexit, new technology and other disruptive forces driving change in the way goods move across borders and through the supply chain, logistics has never been more important to UK plc.

Logistics UK supports, shapes and stands up for safe and efficient logistics, and is the only business group which represents the whole industry, with members from the road, rail, sea and air industries, as well as the buyers of freight services such as retailers and manufacturers whose businesses depend on the efficient movement of goods.

For more information about the organisation and its work, please visit logistics.org.uk

LOGISTICS UK

The CBI Minerals Group – Implementing the UK Minerals Strategy

The CBI Minerals Group produced the first UK Minerals Strategy in 2018, updated in 2022[1], to articulate the needs and concerns of the minerals sector and propose actions and solutions to the most pressing issues.

The Strategy highlights that minerals and mineral products represent the largest material flow in the economy at around a million tonnes per day, and that this supply is essential for the economy but continues to be taken for granted by policy makers.

Continued supply cannot be assumed, and it must be planned, monitored and managed. In particular, it is essential that the link is made between the need for housing and infrastructure, the transition to net zero, and the domestic raw material supply chain that enables this to be delivered.

The current priorities of the CBI Minerals Group focus on three key themes identified in the latest strategy.

Transition to net zero

The need for 'critical' minerals in decarbonisation and the transition to net zero, particularly in electrification and batteries, is well recognised. The government has produced a Critical Minerals Strategy[2] and established a Critical Minerals Intelligence Centre[3] (led by the British Geological Survey) to better understand and improve security of supply.



David Payne, CBI Minerals Group Secretariat & MPA Senior Planning Advisor.

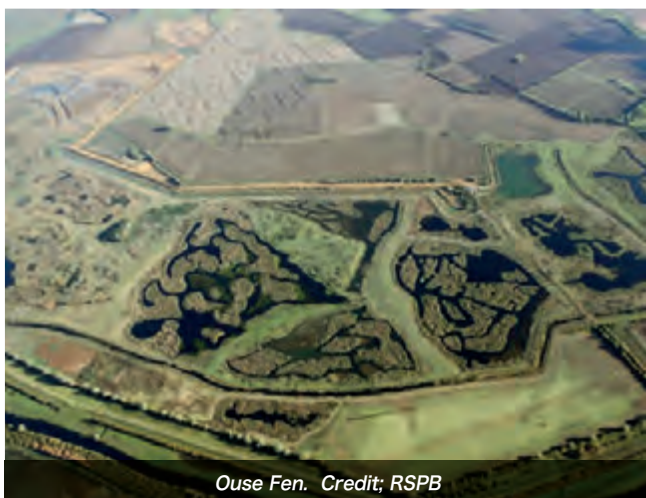
Critical minerals, such as lithium and graphite, are generally restricted in geographical distribution and their supply chains potentially vulnerable, hence the focus of the government given the heavy reliance on imports.

There has been much less focus on the role and need for a steady and adequate supply of 'essential' minerals that are domestically

available and used in much greater quantities including construction aggregates and industrial minerals.

A good example is the development of floating offshore windfarms (anchored in in deeper water than conventional fixed offshore wind), for which there are ambitious proposals including development of an initial 4.5GW (with plans for up to 20GW) in the Celtic Sea off the coast of Wales and South West England[4]. The initial 4.5GW could require 264 turbines, with each having a floating base constructed from steel and concrete (and so aggregates and cement). The requirement for aggregates used in concrete for this initial phase could be almost 4 million tonnes, rising to 18 million tonnes for the full roll-out.

The economic value of this scale of construction is massive[5] at around £1.4bn gross value added for the initial 4.5GW, but the benefit to UK plc will depend on where materials are sourced (including from quarries and marine) and where manufacturing occurs, all of which requires strategic joined-up planning over the long term, and investment in securing required mineral reserves.



Ouse Fen. Credit: RSPB



Black Hill, Devon. Credit: David Payne, MPA



Offshore wind farm with floating concrete platforms. Credit: BW Ideol



Wildflower planting on landscaping bund at Bayston Hill. Credit David Payne, MPA

Functioning of the planning system

The planning system is commonly identified as a major barrier to economic growth. Reform of the system and processes is always on the political agenda, but the motivation for change is inevitably delivery of much-needed housing, with minerals planning and the minerals required for delivery largely being ignored. However, many of the changes that are proposed will also affect minerals planning. But it is crucial that the unique characteristics and issues associated with minerals are properly recognised through the planning system, including through specific development management policies for minerals. Work is also underway to prepare new National and Sub-national Guidelines for provision of aggregates in England, which would go some way to providing a 'statement of need' (as recommended in the UK Minerals Strategy) for aggregates, but similar forward-looking assessments of 'need' are also required across the other devolved administrations in the UK. In the absence of quantified need at national and regional levels, there is a risk that sufficient reserves will not be provided for to meet demand. The warning lights are already flashing, as the MPA's Annual Mineral Planning Survey[6] identifies the continuing depletion of rock and sand and gravel reserves across GB, as sales continue to exceed new permissions.

Nature recovery and biodiversity gain

The UK is one of the most nature-depleted countries on Earth[7]. While the majority of the declines in species and habitats over the last century have been due to agricultural intensification, development has also had an impact. The protection of wildlife has been strengthened over recent years, and has moved beyond simply protecting important sites to seeking no net loss of biodiversity, requiring enhancements and 'net gain' – so resulting in more wildlife following development than was on a site before. The minerals industry, and minerals planning system, has a long and proud track record of delivering large biodiversity (and other social, economic and environmental) gains through operations, site restoration and after-use. For example, MPA member companies have created at least 8,300 hectares of UK priority habitats, with at least a further 11,000 hectares in the pipeline. In England, the Environment Act 2021 introduced a requirement for almost all new development, and so almost all planning applications, to demonstrate delivery of biodiversity net gain of at least 10% (so at least 10% more biodiversity after development than before). This became mandatory in England only in February 2024. While primarily introduced to address

losses caused by housing and commercial development, this also applies to minerals development and similar concepts are being explored by the devolved administrations in Wales and Scotland (although quantified gains are not currently required). Minerals extraction is very different to other types of development, being essentially temporary with progressive working and restoration over many years, so losses and gains of biodiversity occur over time. This makes using the tools[8] developed to assess biodiversity losses and gains problematic. Unfortunately, guidance[9] issued recently fails to cover minerals extraction and so the sector is currently operating in a bit of a void. Working together with the Planning Officers' Society, the minerals industry is preparing advice to inform implementation of biodiversity net gain by operators and planning authorities. This is needed to ensure that it doesn't lead to worse outcomes than were being achieved before net gain became a legal requirement for all. So we have a busy year ahead, and will continue to use the UK Minerals Strategy as our touchstone.



[1] https://mineralproducts.org/MPA/media/root/Publications/2022/UK_Minerals_Strategy_2022.pdf
[2] <https://www.gov.uk/government/publications/uk-critical-mineral-strategy>
[3] <https://ukcmic.org/>
[4] <https://www.thecrownestate.co.uk/our-business/marine/round-5>
[5] https://assets.ctfassets.net/nv65su7t80y5/nDXSS9l3qvtscyxa1rlwq/ded23422bbc04bf6a8753cc3623f0016/Celtic_Seas_Blueprint_final_report_Feb2024.pdf
[6] https://mineralproducts.org/MPA/media/root/Publications/2023/AMPS_Report_2022.pdf
[7] <https://nbn.org.uk/news/state-of-nature-2023/>
[8] <https://www.gov.uk/guidance/biodiversity-metric-calculate-the-biodiversity-net-gain-of-a-project-or-development>
[9] <https://www.gov.uk/guidance/biodiversity-net-gain>

CITB NI – fostering diversity for the local construction industry

CITB NI is committed to fostering a more inclusive and diverse construction industry by providing platforms for networking, inspiration, training initiatives and promotion.

CITB NI's well-established Women in Construction Network runs a number of different events every year which include site visits and networking opportunities to give the members opportunities to network and showcase key projects and case studies.

Over the past 4 years CITB NI has successfully hosted three Women in Construction Summits which have provided personal inspirational stories, business guidance, and career advancement tailored for women in the construction industry, as well as those considering entering the field.

One of the main requests from the first Women in Construction Summit in 2020 was to provide a mentoring service. Since then CITB NI has been a corporate member of Women in Business which has allowed 17 Women in Construction Network members from companies such as Farrans, Graham, Heron Bros, and Adman to participate in the Women in Business Mentoring Programme. The mentoring focuses on developing both personal and professional skills and is applicable to a wide range of roles within industry.



Sarah Travers, Maria Bradley, Rachel Dorovatas.

To develop more women focused training programmes CITB NI launched a pilot Women in Plant Training Programme last year. This fully funded training in partnership pilot programme provided 12 women, from across Northern Ireland, with the opportunity to gain recognised plant operator qualifications for two types of plant machinery, a Construction Skills Register (CSR) card along with health and safety training. The programme was a success with all participants completing the practical and theory training and gave them skills to work with plant machinery onsite. CITB NI's Training in Partnership

Funding also supports the #NotJustForBoys programme delivered by Women's Tec. This initiative aims to educate and empower young girls to consider careers in construction through bootcamps, DIY lessons, and career engagement events.

CITB NI continue to promote an inclusive construction industry to all young people, teachers, careers advisors, parents and guardians through the web portal, information, careers fairs and events to promote the opportunities working in the industry can bring.

For further information on Women in Construction, log on to www.citbni.org.uk, like us on Facebook, or follow the discussion on X, Instagram and LinkedIn.



Rachel Dorovatas CITB NI welcomes trainees to the first Women in Plant Programme.

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- Advising on major minerals planning applications.
- Advising on Section 76 planning agreements for minerals developments.
- Legal input into the legal review of minerals planning applications.
- Representation of minerals companies at public inquiries and planning appeals.

To find out how we can assist you, please contact:



Gary McGhee

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Belfast Hills Partnership Using Quarries to Join the Dots



Jim Bradley.

One of the most major shifts in nature conservation over the last few decades has been a move away from protecting isolated high quality sites, with rare species and habitats, towards doing our best to join habitats up across whole landscapes.

This has been pushed by our new understanding that wildlife are much more at peril in small isolated patches, whereas even narrow connecting links can make those populations so much more resilient to threats such as disease, food shortages, predation impacts or genetic problems.

If you combine quarries with other post-industrial sites such as old mills, dams and works, a significant proportion of the Belfast Hills is or has been used for commercial purposes.

Many of these sites have unused boundary areas and wooded shelter belts.





These are often the biggest areas of refuge for wildlife, so when we began to map out habitats and try to identify where best to focus limited resources to create new ponds, woodland and wildflower meadows,

it was no great surprise to see quarries featuring prominently within these proposed wildlife corridors. Where particular types of habitat are too dispersed or too small to offer a realistic chance of completely joining up a corridor of e.g fen or open mosaic habitat then these sites can have a crucial role as 'stepping stones' for those types of wildlife that can only move a limited distance across landscapes. The other major plus of such sites is their strong security and exclusion of the public on working sites. While public access, awareness and education are so important to making sure people care for their local wildlife, having areas of minimal disturbance can be so important to sensitive species such as nesting birds of prey. It is no wonder that many quarries are full of wildlife struggling to remain present in the rest of the landscape.



So what does this change in direction in landscape nature conservation mean for your site?

It means that if you just get a map of your site and look to see what you can do within your boundaries for local wildlife then you're missing a trick, you need to look beyond your boundaries.

If you're in between two areas of woodland then even filling in a few gaps in that old hedge which connects them could reap a lot of benefits – of course a belt of new connecting woodland would be even better. If there's a dearth of open water ponds

in your local area then a new pond will be well worth considering.

How do you get a good picture of what's in and around your boundaries?

You may well have local partners and biodiversity officers who have this sort of information informally or indeed formally in terms of landscape habitat mapping. As often is the case these days, good partnerships are the key to success. Working on biodiversity projects where your sites play a positive role can be a real win-win scenario.

Within the Belfast Hills Partnership, our work with partners such as the Breedon Group on woodland creation, new ponds and wildflower meadows is bringing real benefits both in terms of improvements for wildlife but also positive engagement and involvement with local volunteers and communities who also appreciate this new landscape scale approach.



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Message from the South Irish Mining and Quarrying Society

**As president of the Irish Mining and Quarrying Society,
I am delighted to contribute to the MPANI Industrial Journal.**

I would like to start by acknowledging the progress made by all parties to have the Northern Ireland Executive back up and running. Focusing future attention and efforts around the 6 "Ps"; Planning, People, Power, Procurement, Politics and Pounds & Pence, will mean a well deserved boost for the people and economy of Northern Ireland.

The mining industry in Ireland suffered a major setback in July 2023 when Boliden Tara Mines was placed in care and maintenance. In May 2024 unions and management agreed to resume operations on a phased basis, albeit with fewer workers and adjusted targets. The mine closure has had a significant impact on individuals and businesses and the reopening is welcome.

More positive mining news as Dalradian's planning application progressed with a call for submissions to a Public Inquiry in early 2023. Full public hearings are scheduled for September 2024. When the mine does open, it will bring jobs and a financial boost to the area. It promises to be an example of how sustainable mining can be conducted. The planning process has been very drawn out but has seen some welcome stimulus with the reforming of the Northern Ireland Executive.

A drawn out planning process is not unique to Northern Ireland. The Government of Ireland has made



strides to tackle the cumbersome planning process with the publishing of the Government's Draft Planning and Development Bill proposal. The proposal states that "If enacted, the bill will bring greater clarity, consistency and certainty to how planning decisions are made".

The planning issues are not unique to the island of Ireland. In Europe similar issues are present. In an effort to reach sustainability for essential raw materials, it is difficult to imagine how we in Europe, and in the UK, can reach very ambitious targets when it takes on average 14 years to establish a mine from resource

to production. There will have to be some big decisions made to see the plans and proposals become reality.

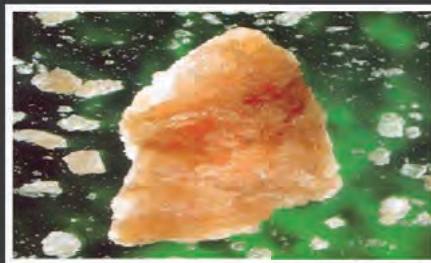
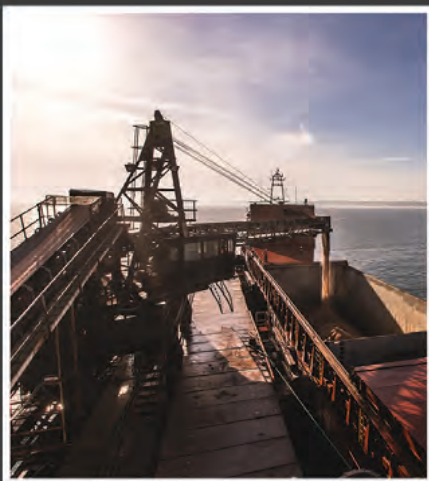
The quarrying industry in Ireland is buoyant and demand is steady. Housing, capital investment and infrastructural projects result in a demand for aggregates and associated value added quarry products.

The quarrying industry directly employs more than 6,000 people in The Republic of Ireland. This is very significant as many of these jobs are in rural regions and support many rural communities. The announcement of significant offshore renewable projects and the infrastructure to service it, has the potential to add to demand and boost the regional economies close to these sites.

I would like to wish the MPANI every success with this publication. It is always an excellent read packed with diverse and interesting articles.

In closing, I would like to take the opportunity to thank the members of the Irish Mining and Quarrying Society for their continued support. We are a voluntary society and without them, the IMQS could not exist.





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CATAGEN's ClimaHtech System Decarbonising Cement and Quarrying

Day after day, our world is witnessing unprecedented climatic shifts. From record-breaking heat waves and devastating wildfires to prolonged droughts and catastrophic floods, the urgency of addressing climate change becomes more pressing each day.

CATAGEN's mission is to clean and decarbonise the air. CATAGEN is a net zero technology company based in Belfast providing unrivalled metrics to optimise catalyst development and reduce harmful tailpipe emissions. Our expertise in global emissions testing and energy efficient chemical reactor technology has led us to develop ClimaHtech – a system of advanced climate technologies.

The cement industry is a significant contributor to carbon dioxide emissions, accounting for around 8% of CO₂ emissions globally*. In the UK alone, cement emissions produced over 4 million metric tonnes of CO₂ in 2022, and 2.1 million metric tonnes in 2022 in Ireland**. The most carbon intensive stage of cement manufacturing is clinker production, which emits approximately 60% of the total production emissions, with the remaining 40% produced from the combustion of fossil fuels to provide heat to the process***.

Due to its high operating temperatures (up to 1500 °C), large energy demand, and high carbon intensity, the cement industry is an ideal application for CATAGEN's ClimaHtech suite of technologies, particularly BIOHGEN.

BIOHGEN uses CATAGEN proprietary technology to produce cost-effective biohydrogen from sustainable organic waste streams and biomass. This energy efficient fuel can accelerate the route to a Net Zero carbon hydrogen economy. Biogenic CO₂ is produced as a valuable by-product of the process that can displace fossil CO₂ use in the food and drink industry, agriculture, and other industrial applications. BIOHGEN may complement existing alternative fuel use at cement works, enabling production of biohydrogen to facilitate a greater displacement of coal from cement kilns than can be achieved



CATAGEN Terex Wrightbus DESNZ Award..

by alternative fuel usage alone by providing the high temperatures needed for clinker production.

"Cement contributes about 8% of global annual emissions and is a critical material we need to build infrastructure including roads, hospitals, and even wind turbines. CATAGEN's ClimaHtech system can complement existing sustainable changes in the cement sector such as flue stack capture and use of alternative fuels to accelerate the decarbonisation of cement production to help create lower carbon cement products." - Ralph Lavery, Net Zero Applications Engineer at CATAGEN.

ClimaHtech is an acceleration system towards decarbonisation using advanced climate technologies to generate renewable 'green' hydrogen, biohydrogen, and gHreen e-fuels, with complementary systems for hydrogen compression and carbon capture.

CATAGEN have conducted a feasibility study alongside Mannok, the Irish cement and construction products manufacturer, to explore the decarbonisation of their operations

using the ClimaHtech system. Implementation of ClimaHtech technologies could reduce total CO₂ emissions from cement production at the Mannok site by at least 18%.

Implementation of solutions at Mannok will displace carbon savings equivalent to removing 49,000 cars from roads on the island of Ireland. The solutions identified in this study could be applied to cement production worldwide where sufficient renewable energy and sustainable biowastes are available.

In addition to the cement industry, CATAGEN has also been working with the quarrying industry, another hard-to-abate sector with significant decarbonization challenges that the ClimaHtech suite of technologies can address.

CATAGEN, Terex, and Wrightbus are working together to decarbonise quarrying through the HyDensity Project. The project was awarded £6.27 million in funding Department for Energy Security & Net Zero (DESNZ) through Phase 2 of the Red Diesel Replacement programme, as part of the £1bn Net Zero Innovation

Portfolio (NZIP) to decarbonise non-road mobile machinery. CATAGEN's ClimaHtech E-FUEL GEN and COMPRESSOR technology will be used to provide e-diesel and hydrogen fuels to Terex's quarrying equipment, supported by Wrightbus mobile hydrogen refueller technology.

The objectives are to develop this complete solution to pre-production readiness level and demonstrate the full systems' approach at two demonstration sites in the UK in early 2025. The benefits of this concept lie in the integration of well-proven equipment with innovative technology that will be capable of delivering a fully decarbonised, robust solution for the industry. By demonstrating both e-diesel and hydrogen fuel use to decarbonise crushing and screening equipment, the project shows how current and future quarrying technology can be operated in a net-zero world.

ClimaHtech's COMPRESSOR technology is a high-pressure hybrid pumping system for hydrogen storage and dispensing. Compression poses a significant challenge in the hydrogen supply chain and current methods in the industry are relatively inefficient, expensive to manufacture, and display various operational issues in use, such as long duty cycles and overheating.

Applications for this technology include transport and mobility, non-road mobile machinery, storage, and integrated hydrogen systems.

ClimaHtech E-FUEL GEN technology produces energy-dense, liquid e-fuels, another essential fuel in a net zero economy. 'Drop in' or blended synthetic fuels can be produced such as e-diesel, e-gasoline, and e-kerosene – the key component in sustainable aviation fuel (SAF). E-FUEL GEN enables the decarbonisation of hard to



Mannok Team.

decarbonise sectors such as aviation, marine, heavy industry, agriculture, and mobility were other decarbonisation solutions such as electrification are not possible or practical.

E-diesel enables full utilisation of existing assets to end of useful life that is compatible with decarbonisation goals and allows remote and rural activities to be decarbonised with energy dense liquid fuels that can be stored easily where other energy solutions such as hydrogen or electrification may not be readily available.

CATAGEN have hosted many members of Mineral Products Association to our Net Zero Campus in Belfast to showcase our ClimaHtech technologies and how they can accelerate decarbonisation of cement and quarrying activities, most recently the Mineral Products Association Northern Ireland Young Leaders Group.

"It is fantastic to see firsthand the strides that CATAGEN is making to drive the transition toward Net Zero. Heavy industry will need innovative solutions to decarbonise rapidly and CATAGEN are an example of the history of innovation in Northern

Ireland that can tackle these globally significant challenges."- Gordon Best, Regional Director of Mineral Products Association Northern Ireland.

The decarbonisation potential of CATAGEN's ClimaHtech system within the cement and quarrying industries is significant. ClimaHtech also has further capabilities to support the decarbonisation of hard-to-abate industries such as aviation, mobility, heavy machinery, and marine as these industries decarbonise to meet net zero targets.

*Statista, 2024. Greenhouse gas emissions from cement production in the United Kingdom (UK) from 1990 to 2022.

**Our World in Data, 2023. Annual CO2 Emissions from Cement, 2022.

***Nature Sustainability, 2024. Paving the way for sustainable decarbonization of the European cement industry.



MPA NI Young Leaders Group.

Tomorrow's Northern Ireland: Building Skills and Training Essential for Construction Industry

Construction Industry Training Board NI (CITB NI) is focused on skills and training for the NI construction industry, and it is our role to provide the support and services needed to ensure our businesses are equipped for progression and expansion.

Despite the construction industry experiencing good levels of growth, the industry faces a range of ongoing and emerging challenges; an ageing workforce, declining numbers of new talent entering the industry, technological advances in IT, the drive for energy efficiency and a net-zero carbon society. Almost without exception, every sector of the industry is struggling to recruit good talent and young people which we are seeing across all sizes of employer and all sectors of the industry.

CITB NI is funded by an industry levy, which has been retained at 0.55% for the fourth consecutive year. We use this funding to help support local employers through our widely recognised Grant Scheme and the development of training programmes, services and partnerships.

As part of our ongoing partnership approach, we work with employer bodies and federations to promote training in action. We have worked closely with Mineral Products Association NI (MPANI) and the Concrete Society to successfully deliver a series of concrete handling workshops for construction site supervisors as part of our Training in Partnership Programme.

CITB NI has also partnered with Ulster University and funded a 'Concrete Technology & Construction: Concrete Practice' short course for approximately 40 students which helped prepare students for a related professional qualification administered by the Institute of Concrete Technology (ICT).

With the industry facing the ongoing challenges of skills shortages,



Barry Neilson OBE,
Chief Executive, CITB.

an ageing workforce and poor perception, it is essential more than ever that the industry does more to successfully promote itself to young people, careers influencers and meet the future demands.

It is essential that we re-think how we attract new entrants into the construction industry. We need to look at potential sources of entrants from, for example, other sectors, including those who have not yet prospered in school, the justice system, people with disabilities, and of course equalising the gender imbalance. We need to look at equality and diversity in its true form and seek talent from all sources.

CITB NI continues to promote construction to the younger generation to help them consider the varied pathways within the industry and to view it as a serious career option for the future. Through our 'Build Your Career – a Future in Construction

Programme,' Construction Bootcamps, Adopt A School Programme, Construction Ambassadors, Teachers Forum and sponsor of the GCSE Construction textbook, CITB NI are creating an ecosystem that develops individuals that leave school with the core skills and attitudes that the industry needs, and the support to continue their lifelong learning journey through the industry.

There is still much to do in joining up the various initiatives that support individuals in their progression into and through their career within the industry. This is at a time where the potential demands on infrastructure, construction, and the wider built environment industry are mounting. The drive for greater energy efficiency and a net-zero carbon society is a significant challenge. This will require a balance of upskilling the existing workforce in parallel with developing new entrants with the skills and abilities needed for not just the known future over the next twenty years or so, but the future, and challenges, ahead that we do not yet know of.

For further information on what we can do to help you and your construction training, log on to www.citbni.org.uk, like us on Facebook, or follow the discussion on Twitter, Instagram and LinkedIn.





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Energy saving is focus across the board at Mannok

Energy saving has become a significant focus at Mannok with major investment across several of the company's manufacturing facilities, including the Cement, PIR Insulation and Precast sites aimed at improving energy efficiency; a key goal in the company's sustainability strategy – Mannok 2030 Vision.

In cement, it has been revealed that since 2017 it has saved 59 million kilo watt hours of energy, achieved through multimillion-euro investment in energy-saving projects while adhering to and retaining the energy management standard, ISO 50001. This enormous saving is equivalent to the annual electrical energy usage of 14,047 Irish households, each consuming 4,200 kWh of electricity annually.

Mannok Cement began its journey of improving energy efficiency in 2017 while preparing for ISO 50001 Energy Management Standard, which it achieved a year later. The purpose of the certification is to enable an organisation to follow a systematic

approach to achieving continual improvement of energy performance, aligning with the targets and goals set out in the Mannok 2030 Vision.

To continually reduce its energy consumption and improve efficiency, the company is measuring all significant energy users across the cement plant and digitally displaying all data via an energy management software to provide an understanding of energy consumption levels throughout the 35-hectare manufacturing site.

This understanding of energy consumption has allowed the company's Cement Energy Management Team to have an

effective annual energy strategy in place as they seek to continue improving energy efficiency and maintaining the ISO 50001 standard.

And by sticking to its strategy, Mannok Cement exceeded its target in 2022 with almost 8 million kWh of energy saved through nine key thermal and electrical energy improvement projects. These included repairing false air leaks in key areas, optimising raw materials and investing in technology upgrades.

It is not only in the Cement plant though that Mannok is investing in energy-saving initiatives.

At Mannok PIR Insulation, a strong ongoing focus on making improvements to its energy efficiency



has led to it also achieving ISO 50001 Energy Management Certification from Certification Europe.

The PIR Insulation energy team put together a system that allows them to monitor, measure and analyse energy usage through a live online monitoring platform so that they can see where improvements can be made while also predicting future energy usage. The system also pinpoints if problems or issues arise allowing the team to address and rectify these quicker.

Indeed, the energy team at PIR Insulation set a high bar, with the auditor commenting in the closing meeting that there is a very comprehensive management system in place; and a very capable team with extensive knowledge of the system overseeing it. In fact, the system is at a point they would typically expect to see after 2-3 years of completing the ISO 50001 Certification.

Meanwhile, new energy-saving measures in Mannok Precast have already started to pay dividends with reduced Liquified Petroleum Gas (LPG) and water usage recorded in the factory.

Precast has made an eye-catching 20% saving on its usage of LPG

over the opening four months of 2024, while the sites energy-saving initiatives have also seen it make major savings in water usage of nearly 50% from the 2022 figures.

A Building Management System, incorporated into an upgraded heating system, means that there is now a more digital-focused process in place in production which has provided the Precast team with greater control over temperature and timings in the production process and ultimately made it more energy efficient.

A manual process previously catered for the eight casting beds in the Precast factory, but the new system allows the team greater control to set the temperature for each of the eight beds individually and the ability to time it to switch on and off.

This new method has resulted in 20% LPG savings over the first four months of 2024 and could lead to up to 25% savings over the full year.

Importantly, this reduction will give the precast division a projected carbon dioxide equivalent (CO2e) savings of 110.5 tonnes over the year.

There has also been a massive saving in water usage at Precast with readings showing a peak

demand reduction of up to 50% in the hollowcore manufacturing factory since 2022. Again, innovation has been key to much of the savings in the factory. A new pressurised system means that water wastage is limited while maintenance and the upgrades to the heating system have all helped in this achievement.

Energy efficiency is an ongoing process across all divisions at Mannok, and there are further energy-saving projects and investments planned by the company, while one of the objectives of the Mannok 2030 Vision is that all divisions of the business have the ISO 50001 Energy Management System certification by 2025.

To watch the video on Mannok Cement Energy Saving of 59 Million kWh or for further information on the PIR Insulation or Precast Products initiatives please visit the Mannok Build website.



Geological Survey of Northern Ireland

A transition journey – are we prepared?

The transition to a low carbon economy has a number of highly visible aspects that people can understand and support. Electric vehicles, solar panels and wind turbines are all easily recognisable as components needed for the new way of life that we all must adopt as we try to mitigate the rising global temperatures.

What fewer people understand, or may not be aware of, is the potential shortage of raw materials that are required to meet the demands of the energy transition. With governments across the globe setting targets for renewable energy generation, competition for the earth's finite supply of the required minerals has already been identified by the earth science community. This is further exacerbated by the dominance of some countries in the supply of or capacity to refine these raw materials into saleable commodities. In addition to the physical problems of location or processing infrastructure, the minerals industry that explores for and mines these materials carries a high financial risk.

As part of the national shoring up of mineral resources, jurisdictions across the world have identified minerals that are considered most important for the economy, climate change mitigation, and national security. The EU, UK, US, Canada and Australia have all issued lists of critical minerals and strategies to secure supply. In the EU the most recent strategic legislation is the European Critical Raw Materials Act. This new legislation sets out targets for domestic (EU) mineral supply, recycling and supply chains.

Access to critical raw materials (CRMs) is vital to the Northern Ireland

economy going forward. We are heavily dependant on import supplies. Our dependency, combined with the growing global demand due to the shift towards a digital and green economy makes supply chains vulnerable. This coupled with geopolitical tensions means that secure and guaranteed access to CRMs is of vital importance.

The licensing of mineral exploration and development is the responsibility of the Department for the Economy (DfE). Operationally DfE is responsible for monitoring historic abandoned mines, one active mine (salt) and mineral prospecting licences (currently 14). DfE also has responsibility to develop policy on exploration and development of minerals. The current minerals legislation dates back to 1969.

The Department is reviewing the policy and licensing regime given climate change and the need to transition from carbon-based energy generation to renewable sources. The International Energy Agency has indicated that the role of policy makers is crucial in reducing the uncertainty and volatility that surrounds material demands. With the global competition for the raw materials needed to bring about this transition a greater understanding of how Northern Ireland can contribute will be informed by the work of DfE.

This rising demand for green energy generation will need to be supported

by the raw material infrastructure to deliver it. As well as critical minerals, raw construction materials will form an integral part of the transition picture. The geological wealth that Northern Ireland has means that this is one aspect of the transition where we can rely less on external sources and their associated uncertainties.

As with critical metals, new approaches and innovation may be required to meet the demand in a sustainable manner and reduce the pressure on our natural environment.

The need to move away from a linear consumer base to a more circular mindset will reduce the impact that we have on the environment and the climate as a whole. In the recent Circularity Gap Report for Northern Ireland one of the key strategies suggested was building a circular built environment.

However, as with critical raw materials, if there is a lack of material available to be recycled then inputs of mined or quarried material will continue to be required to meet demand. Building a circular economy is vital for a sustainable future, and although aiming for 100% circularity may not be realistic in the short term, small changes in practices can lead to substantial long-term benefits.

Mark Patton, Minerals Geologist,
Geological Survey of Northern Ireland



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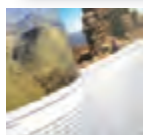
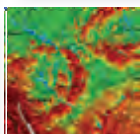
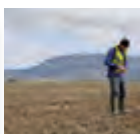
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GSNI collects, interprets and provides geological data, research and advice to central and local government, industry, academia, NGOs, schools and the public. GSNI maintains extensive digital databases and paper archives that are accessible online and through our enquiry service.

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Aggregates Sector a Driver of Economic Growth

McHALE PLANT SALES

In a recent statement published in UK trade media, the chairman of Metso's UK and Ireland distributors, McHale Plant Sales, pointed to what he called 'a number of positive developments' in the aggregates and quarrying sector as indicative of the likelihood that "the UK economy is 'on the cusp' of better times ahead".

Working on past experience, and knowledge that he and colleagues have gained as major equipment distributors to the construction, aggregates, and civil works sectors, McHale knows that recent positive developments in the industry are a pointer to economic growth and a bellwether of better things to come.

In a more light-hearted vein, even amateur economists know that, when tower cranes dominate the skyline, things are looking up. Conversely, when they fold their jibs and leave, and the cityscape becomes clear again, then will one know that the pickings will be poor for some time to come.

Now ensconced as the UK's go-to people for Metso Lokotrack mobile crushers (in Ireland, their mandate includes mobile and fixed units), their first priority on appointment was to equip themselves with premises and all of the other start-up requirements needed to fully represent such a global player and respected manufacturer.

With a headquarters in Tamworth and a second base in Edinburgh, and top-flight appointments made in sales, after-sales, parts and service support, the company now has an effective sales presence on the ground across the extensive land mass that

England, Scotland and Wales represent.

Close to members of the Mineral Products Association Northern Ireland – and increasingly so to those in its affiliated Mineral Products Association as their contacts throughout the sector in England, Scotland and Wales continue to expand - McHale Sales Director, Denis McGrath applauds what he calls: "the work MPANI is doing towards 'securing' a future and socially responsible aggregates industry".

In the field of research and development alone, McGrath notes: "it has become a not-infrequent occurrence for one to read news of new developments in the road

McHale Plant Sales
new premises in
Tamworth.



surfacing and asphalt sector – a topical subject in the UK as demand from the UK public for a political response to the potholes problem becomes more shrill”.

Welcoming the introduction of Metso’s new Lokotrack EC diesel-electric powered crushers, McGrath commented: “because of their tracked design and transportability - on-site and from site-to-site - Lokotrack EC models provide an important extra option for aggregates producers in circumstances where the convenience, reduced noise, zero emissions, and cost-saving benefits of electric power are major considerations”.

First two products in the new EC range are a Lokotrack LT400J 68-ton mobile jaw crusher designed for the primary crushing of hard rock and recycled aggregates, and a 50-ton mobile Lokotrack LT350C cone crusher for secondary and tertiary crushing, both of which can be seamlessly combined with each other and with Lokotrack mobile screens to produce high quality aggregates.

To reach high capacity, the LT350C is equipped with the new Nordberg HP350e cone crusher and the LT400J with the proven Nordberg C120 jaw crusher.

Mindful of the worldwide emphasis being put on measures to combat global warming, and of the race to reach zero emissions, aggregates producers anxious to enlist in that campaign whilst benefitting

from the many other features that electric power can bring, can now equip themselves with what McGrath calls “the biggest game changer to arrive on the scene since the tracked undercarriage”.

Away from the rock face’, McGrath points also to the contribution that the Mineral Products Association and its Northern Ireland membership can play in supporting the vital work of invention and environmental innovation.

Citing the recent announcement of an advanced asphalt which combines a selected aggregate and polymer-modified bitumen whose USP is ‘to improve the durability of urban roads

by helping to strengthen surfaces against the problem of potholes, deformation, and premature cracking’, McGrath said: “faced with the many challenges for which society must find solutions, bodies such as MPANI can have a forefront role in driving invention in-line with the revered and respected force it is”.

“Alongside other like-minded institutions, industry values the support the Association provides in communicating with government and the academic sector, in sparking research and invention, in being the voice of a sector, and in promoting the attractiveness of careers in mining and aggregates”.



Metso LT400J Jaw crusher - The first unit available in the new EC range from Metso.

Decarbonising Together

The Mineral Products Association of Northern Ireland is a partner in the Industrial Decarbonisation for Northern Ireland (IDNI), which is an Innovate UK funded project, led by Invest Northern Ireland. The Industrial Decarbonisation for Northern Ireland (IDNI) project has been developed to demystify and assist businesses manage increasing competitive pressures arising from energy and productivity challenges. IDNI intends to do this by adopting a double shortlisting methodology across Northern Ireland.

Firstly, it will be identifying a minimum of four industrial clusters of high energy users, within a defined geographical area, such as an industrial site. Each cluster will consist of approximately 4-8 company sites, closely located, thereby facilitating shared resource. Secondly, to allow sectoral, or similar energy load businesses on more dispersed, detached, or remote sites, the opportunity to engage in IDNI as part of a 'collective', it will be shortlisting a minimum of five Communities of Shared Interest, or COSI's. Again, each COSI will consist of only 4-8 company sites and will empower COSI members to consider shared carbon reduction solutions.

The IDNI partnership is the most comprehensive group of NI stakeholders ever assembled, in conjunction with MPANI, it includes Manufacturing NI, Queens University/Advanced Manufacturing Innovation Centre, University of Ulster/Smart Manufacturing Data Hub and a GB Consortium that previously delivered an award winning UKRI funded Decarbonisation project in England titled RePowering the Black Country. Other Stakeholders include, Dfe, DAERA, Electricity, Gas, Water Utility Companies, NI's Utility Regulator, and all 11 NI Councils

By December 2024, IDNI will have



identified a minimum of 4 industrial clusters, or groups of closely located high-energy using businesses from across NI, assisting them to:

- Conduct a 'no-cost' energy survey, covering data capture/automation/energy efficiency.
- Consider infrastructure/energy solutions to reduce GHG emissions across the cluster.
- Inform council planning and policy development through enhanced engagement thereby assisting carbon reduction plan roll-out.
- Identify funding/finance support to assist delivery of any plan developed.
- Prepare possible digital

twin representation of solutions proposed.

- Report on cost-sharing measures to reduce any capex needed to deliver plans.
- Publish the plan as a template for wider NI industrial decarbonisation initiatives.
- Include information on savings on a Knowledge Sharing Platform
- Liaise with utility operators to determine costs, timelines, options, and requirements.
- Engage NI Departmental leaders to assist with policy development and funding support.



Business leaders across NI understand the challenges of energy prices, increasing policy, regulation, and consumer demands, which are resulting in a company's **Decarbonisation** Plan becoming a key element, or passport to doing business, **NOW** and in the **FUTURE**.

The learnings established from across these industrial clusters deliver solutions that will be shared through a Knowledge Sharing Platform to help industry across the region demystify, inform, and accelerate NI decarbonisation. The Knowledge Sharing Platform will contain a suite of free resources, such as:

- NI council section containing NI council Net Zero information
- Stakeholder section containing Net Zero Reports/Content from NI Water, Phoenix, Sustainable NI, Londonderry Chamber,
- Funding section containing information on decarbonisation support
- Industrial Mapping Tool, including High Energy Users across Advanced Manufacturing, Food & Drink, Digital, Freight & Storage etc
- Productivity Emissions Tool developed

IDNI will allow businesses across the region, including Mineral Products Association members the opportunity to showcase their sustainability credentials and consider plans that could deliver:

- Cheaper and more predictable energy costs: Helping companies to become more competitive.
- Improved Productivity: Investigating automation/process improvements/energy efficiency as a carbon reduction enabler.
- Better Supply Chain relationships: Allowing businesses to demonstrate to customers how they are delivering a lower carbon product and beating competitors,
- Enhanced Green Investment Potential: Reductions in carbon emissions will improve industrial attractiveness to green investor capital.
- Increased UK funding visibility: As part of an Innovate UK funded project, cluster companies will become more informed and visible to national low carbon funding streams, such as IETF.
- Being exemplars for NI industry: Becoming best practice models for decarbonisation across NI's wider industrial base.
- Shared infrastructure cost models: Prepare cost sharing models across cluster businesses



to socialise any projected infrastructure/technology spending. The IDNI partnership is delivering

workshops across all 11 councils to promote the project and identify the most suitable industrial clusters and COSI's to investigate. To date, over 400 people have attended the council workshops delivered, which includes, 150 high energy industrial users, which equates to 175 high energy industrial sites being represented.



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Bringing Structure to Life

For over 85 years Irish Cement has been manufacturing high quality cement in both Limerick and Drogheda. That long industrial heritage and the knowledge that we have been a reliable and consistent supplier to many of Ireland's most important and iconic buildings down through our history is a source of great pride.

During those decades Irish Cement has continually invested and upgraded both factories to be modern efficient manufacturing facilities producing cements for both the domestic and export markets.

Our customers have become more sophisticated in how they use our cement for increasingly diverse and innovative projects. Irish Cement is well set to support the sector to deliver more sustainable construction solutions to meet the housing and infrastructure needs

of Ireland's growing population.

Given the scale and energy intensity of our manufacturing process, we have a long history of driving improvements and innovation to ensure we remain competitive and sustainable. Through energy-efficient investments, fossil fuel replacement using locally sourced alternative fuels, and lower carbon CEM II cements we are reducing our impacts while still maintaining product performance. Measurement and reporting environmental performance is now an essential requirement and Irish Cement published its

first set of verified Environmental Product Declarations (EPDs) in 2024. These set out a series of metrics that we are working to further improve over the coming years.

Driving these improvements are our people. From our R&D team, Technical Support and Regional Sales Managers we are working with our customers to understand their needs. We have a culture of collaboration in both factories with diverse teams from right across the workforce running our day-to-day operations and managing new projects and investments.





Irish Cement benefits tremendously from being part of CRH and the opportunities for global collaboration and best practice sharing it brings.

Our continuous commitment to quality ensures that our cement performs to the highest standard for all of our customers, whether they are producing precast concrete, ready-mix concrete or small-scale DIY projects at home. Cement and concrete play an integral role in all our daily lives. From our homes, schools, farms, factories, hospitals, bridges, roads, runways, all around us every day concrete enables modern life.

There is an enormous pride among our workforce when they see completed projects knowing that our cement has been an essential ingredient in bringing that structure to life!



**BRINGING
STRUCTURE
TO LIFE**



Momentum Tax Group

7 things you need to know about RESEARCH AND DEVELOPMENT TAX CREDITS

Research and Development (R&D) Tax Credits are the most generous form of corporation tax relief in the UK. But in the face of a more rigid approach to compliance, many companies are hesitant to claim, claim in error, or are struggling to vocalise their innovation to HMRC definitions.

As those operating within the sector will know – construction, mineral extraction and quarry activities can be challenging, and projects completed to resolve those challenges may qualify for R&D tax credits.

If you feel like you don't know enough about R&D Tax Credits and how they could help your company, don't worry.

Based on our years of experience, successfully advising minerals, quarries and aggregates clients on key aspects of the R&D Tax Credit scheme, we have developed a simple guide to help give companies a better understanding of how they could benefit from R&D Tax Credit relief:

1. A Claim for R&D Tax Credit can reduce the cost of an R&D project by 20%.
2. R&D Tax Credits are not just valuable for profit-making companies, they may be used to offset future tax liabilities or may be paid to the company in cash.
3. R&D for tax purposes sets out two test gateways; Have you attempted an advance in science or technology, and did you overcome scientific or technological uncertainty in the process?
4. R&D claims can be made retrospectively, allowing past costs to be recouped.



5. Companies may claim relief for expenditure on staffing costs, materials, utilities, software, as well as certain third-party costs such as payments to subcontractors etc.
6. Companies that are working with clients as part of a collaborative project, or those providing services to contractors may also qualify.
7. HMRC employ specialist units to deal with R&D tax credit claims, so it is important that companies engage specialists that have the appropriate knowledge, experience and adhere to compliance policies.

If you have further questions or think your company could avail of R&D Tax Credit relief, call on of our team of experts at the Momentum Tax Group on 028 9140 4030.

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Northstone Materials Limited: Advocates for Sustainability in the Built Environment

Northstone Materials, a CRH company, has supplied the construction industry in Northern Ireland for over 60 years with quality building materials. Concrete blocks, concrete roof tiles, sand, gravel, stone, limestone, and asphalt - we have it all! And, with production locations strategically positioned across the province, we can assure stock and speedy delivery.

However, at Northstone, we recognise that our tradition and heritage come with a responsibility to protect our planet and enhance the lives of our people for generations.

While we are incredibly proud of our achievements to date, we understand

there is still more to do. We have a critical role in fighting climate change and have therefore committed to working tirelessly alongside our supply chain partners and customers to deliver sustainable excellence.

To solidify this commitment, we have recently published two

Environmental Product Declarations (EPDs) for our Concrete Roof and Ridge Tiles that can be found on the International EPD system.

An EPD is a standardised, third-party verified document that contains detailed information on a product's environmental impact throughout





its life cycle – from cradle to grave. It looks at more than just CO₂; it measures other indicators such as acidification potential, ozone depletion potential, and eutrophication potential. EPDs allow consumers to confidently identify the most environmentally conscious products in an easy-to-read way. In due course, we will develop EPDs for all our popular products, so watch this space!

In the meantime, for our RMC products, we can provide a Customer Carbon Footprint report detailing the Cradle to Gate (A1-A3) and Transport to Site (A4) product and project carbon footprint information, including the carbon savings related to using our sustainable solutions. We can make calculations with the same methodology as an EPD; it just isn't verified by a third party. The report can be utilised at the design or tender stage, during construction or at the end of the project to give our customers a detailed insight into the embodied carbon. Like an EPD, it also allows our customers to compare alternative products and services, actively seek lower carbon alternatives and understand the impact of using

recycled and secondary materials.

In terms of our sustainability journey, we have made a commitment to reducing our absolute gross Scope 1 and 2 greenhouse gas emissions by 42% by 2030 from a 2021 absolute base year – an essential milestone in our strategy toward achieving our net-zero by 2050 ambition. Over the past few years, we have already made significant progress in embedding all aspects of sustainability into our organisation and the work we do by:

Installing a gravity-fed rainwater harvesting system at our Tile Plant in Toome, reducing our freshwater usage by 4,000 cubic metres per annum – the equivalent of 8,000,000 water bottles,

Planting the equivalent of 10 football pitches worth of trees across several sites to promote biodiversity and contribute to the health of our ecosystem,

Installing 505 PV Solar Panels on the roof of our Tile Plant in Toome – is expected to produce enough electricity per annum to power over 50 homes and considerably reduce the site's reliance on the electricity grid,

We are conducting several sustainable solution research and development projects across various products, including concrete roof tiles and asphalt.

Our work sets a precedent and foundation to continue achieving real and lasting results by embedding sustainability in what we do; we aim to replicate and scale up this action into the rest of the year and beyond.

At Northstone, we are committed to delivering products of the highest quality AND reducing our impact on climate change...reinforcing our reputation as a trusted provider of superior building products.

For more information or to request a concrete carbon footprint report, view our website at www.northstonematerials.com or contact sustainability@northstone-ni.com





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Working in partnership to deliver renewable energy and decarbonise the Northern Ireland economy

Today, tomorrow and into the future society will continue to need energy and infrastructure. At present both produce CO2 and despite multi-national interventions and successes in areas such as renewables, global emissions are increasing and further innovation is required to accelerate reductions and find a balance within the global system. Balance is a necessity and a transition to a low-carbon, net zero world is underway which will impact on all economic sectors.

All industry sectors and civil society in Northern Ireland (NI) are at different points on the road to net zero. The Centre for Advanced Sustainable Energy (CASE) was established over a decade ago as the need to support NI industry on its innovation journey was clear. While CASE was established long before the term Net-Zero was known it was clear that renewable energy and innovation were strengths of NI. CASE was established to support innovation in the space now captured under the Net Zero umbrella. It is a partnership between Queen's University Belfast, Ulster University and AFBi and has been at the forefront of addressing NI's renewable energy, decarbonisation and circular economy challenges supporting the development of new products and services as well as increasing productivity and competitiveness.

CASE has not only been in the lead for energy and decarbonisation research but also has been instrumental in supporting the development of energy and circular economy policy by Northern Ireland's government departments. This culminated in June 2023 when the Department for the Economy and the CASE delivered the first Northern Ireland Energy Summit.

A white paper accompanied the summit. This was developed after extensive consultation with industry and other stakeholders and put forward ten recommendations to set NI on a pathway to a renewable future. These covered a broad range



Professor David Rooney.

of areas including governance, finance, technology and cooperation. The formation of the Northern Ireland executive in February 2024 has given an opportunity and fresh impetus to see the recommendations actioned. One of the key objectives of the white paper was to see a whole of government approach. Therefore, it was very encouraging to see the Economy minister, Conor Murphy, and the Minister of Agriculture, Environment and Rural Affairs, Andrew Muir, both address a recent meeting hosted by CASE at Stormont to discuss the way forward.

All parties to the meeting agreed that change was essential and there was need for a truly cross-government approach.

Joined up thinking is critical if NI and other regions and nations are to succeed and leveraging place-based resources can ease and accelerate the journey. There are many examples where the work of CASE in partnership with member companies, MPANI and others has over many years supported the implementation of low-carbon technologies and the development of innovative solutions which have attracted additional funding from NI and UK governments as well as others.

Together, we have investigated solutions for fuel switching for industrial processes, marine energy foundations, alternative fuels for HGVs and off-road machinery, and the decarbonisation of cement and concrete products amongst the many and varied CASE funded research projects.

While current CASE research projects focus on the development of technology solutions the emphasis has changed to encompass not just energy related studies but also sustainability and circular economy applications. The shift in emphasis has been driven by a number of factors, including:

Recognition that there are major opportunities for Northern Ireland in the shift to a future green economy, especially by bringing together the energy, manufacturing and agriculture sectors. These opportunities include new products and services as well as decarbonisation of existing



industries. Zero-carbon concrete or sequestering biogenic carbon into building products are just a couple of pertinent examples.

Identification that there are many waste streams that are underutilised and that these could be turned into valuable products. Conversion of food and agricultural waste such as animal slurries into biomethane via anaerobic digestion (AD) is one example but many other opportunities exist. These include use of waste heat for district heating, excess nutrients for biogenic fertilizers and captured CO₂ for production of e-fuels, chemicals or enhancing growth of plants in vertical farms.

Realisation that by co-location, co-production and a systems-based approach many of the manufacturing costs of green goods and fuels could be considerably reduced. Conventionally, production of many decarbonised alternatives to fossil fuel derived energy and products is more expensive and therefore low-carbon products and fuels require a price premium, subsidy or some other form of support. A systems-based approach, at scale, can deliver price parity or close to it for decarbonised goods and fuels compared to existing fossil fuel-based products.

Understanding that as a small country, Northern Ireland has few large emitters of CO₂ and a larger number of small emitters. These are widely dispersed around the region which means conventional solutions of CO₂ capture, transport and storage

in geological formations such as offshore aquifers are not economic.

To implement such an approach would put Northern Ireland companies at a competitive disadvantage and so alternative approaches that utilise CO₂ in new products could at least provide an economic offset to the cost of capture, if not the creation of a profitable new line of business. Similarly, some opportunities exist for the utilisation of basalts to capture CO₂ and these could work alongside other products such as fertilisers to enhance sequestration.

Observation that a systems-based, circular economy approach to decarbonisation in Northern Ireland could, by design, also address social and environmental issues while also providing a financial return. Important, current examples include:

Addressing fuel poverty by using waste heat to power heat networks for social housing is high on the political agenda due to energy and overall cost-of-living crises.

Preventing pollution by recovering nutrients from farm waste and using these to create tailored fertilisers could be a major part of solving the algae blooms in Lough Neagh that have led to global headlines.

Our thinking within CASE has led us to develop a model to capture the potential for new, green industry hubs. This has built on a legacy of investigation and development of policy options, research projects, thought experiments and economic factors to create an ecosystem of green industry

hubs that will be financially viable without subsidy. These hubs can be viewed through the lens of products or services delivering energy, carbon and other products by integrating and building from core regional strengths.

Each hub is expected to specialise, depending on local resources and infrastructure, market requirements and existing industries. For example, a hub located close to a port might specialise in e-fuels for the marine sector and also sustain a large heat network for civic buildings and housing.

Energy services are central to any green industry hub. Driving these are renewable electricity from local generating assets and, for as long as NI remains agriculturally rich, a large-scale Anaerobic Digestion (AD) plant to convert biogenic feedstock into biomethane as a replacement for fossil gas. Heat is the final energy product which could be used on site for drying or other industry process or alternatively a heat network.

The AD plant provides not just biomethane but also biogenic CO₂ and digestate which are the feedstocks for other Carbon and Agri-tech service sectors. Carbon services might encompass production of green fibre (e.g. hemp/flax) for composites, building products, weaving and packaging.

Biogenic CO₂ supports the manufacture of e-fuels and/or chemicals when used alongside green hydrogen from a co-located electrolyser powered by renewable electricity.



This element of the green industry hub could also incorporate a biorefinery to produce high-added value products such as feed supplements, pharmaceuticals, dyes and enzymes. Conversion of the solid digestate component via pyrolysis to produce biochar is likely to be an additional stream of activity as this presents an opportunity to permanently sequester carbon from the atmosphere and decarbonise other sectors of the economy, such as concrete production. The green industry hub might also be an ideal location for novel forms of farming as well as providing agri-tech services such as the removal and conversion of nutrients to fertiliser, digestate conversion to organic fertiliser/peat substitute/mushroom substrate. In the hub, ready availability of renewable electricity, heat, nutrients, CO₂ and oxygen (from electrolyser) enables vertical

farming and aquaculture including growing of tropical crops and seafood species such as tiger prawns. While the concept of a green industries hub is, to an extent, idealised, it does give a flavour of what is possible. For the mineral products sector, beyond provision of green energy and low-carbon fuels, perhaps the most interesting product is biochar. This is produced from plants and wood by basically heating the organic material to a high temperature in the absence of oxygen. The qualities of biochar are highly dependent on the source material and the treatment method and conditions used. Its long-term sequestration potential is well recognised and other properties such as surface topography, structure and chemical composition all play a role in optimising for different end uses and requirements. Overall biochar represents a real

opportunity to decarbonise cement, concrete products, road surfacing materials and many other related products, offsetting emissions from production, transport and manufacturing of end-products. Currently, there is a lot of interest and R&D underway internationally into the use of biochar in concrete. CASE recognised this opportunity early and is sponsoring research into biochar production and assessment of biochar inclusion in concrete products.

CASE research has shown that biochar produced from digestate solids obtained from AD plants in Northern Ireland is not only of high quality and permanence but also has unique qualities due to the high silicate content. This research has shown that inclusion of regionally sourced AD derived biochar into concrete can create net-negative carbon concrete products while having increased strength compared to use of alternative biochars. The first real-world products are now being produced for testing. The future is green, including for concrete.





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Dalradian issues fifth Responsible Business Report

Dalradian, the US owned company developing an environmentally responsible copper-gold-silver mine in west Tyrone, has published its fifth Responsible Business Report (2023) providing an overview of the company's environmental, social and governance activities and performance. This report includes an update on the project's progression through the planning system as well as key metrics illustrating Dalradian's long-term commitment and responsible approach to modern mining.

A key achievement for 2023 was certification as Carbon Neutral Plus for the fifth consecutive year, reducing carbon emissions by 75.4% measured against baseline year (2019). To offset our emissions from 2023, we chose to support an internationally certified Zambia safe water project. Over the past five years, Dalradian has planted 1,700 trees in Northern Ireland to achieve the Plus designation.

It was another strong year for health and safety, surpassing 3 years with no lost time incidents (LTI), and environmental performance, with no instances of non-compliance. As with our health and safety culture, we are also prioritising our commitment to sustainable practices and incorporating that into our decision-making and planning. Our sustainability team continued work on the tree nursery to supply a progressive restoration programme starting during construction, which will accumulate in planting over 30,000 native trees such as oak, hazel and rowan. We are in ongoing discussions with potential suppliers about incorporating lower-emission products into the future mine, focusing on consumables such as concrete and steel, as well as fuel and vehicle innovations. It is a great time to be building a new mine! Because our project is in Tyrone, we are close to some of the global leaders in engineering and manufacturing of mining equipment. There are also excellent envirotech firms locally so we will have some great partners to work with on our sustainability journey.

The report also highlights the importance of securing local supply of minerals and reducing the UK's reliance on imports for supporting industries, jobs, and the transition



Oak Seedling.

to a decarbonised economy. The UK launched its Critical Mineral Strategy in 2021, along with its initial list of critical minerals. The UK Critical Minerals Intelligence Centre was created to support and update the strategy and list through ongoing research, with the next update of the critical minerals list anticipated this year (2024). A wider range of candidates is being assessed for inclusion, including copper. One of the goals of the UK strategy is to avoid environmental, social and governance (ESG) issues that can occur in jurisdictions with lower regulatory standards, for example, with respect to health & safety or the environment.

Dalradian is supporting ongoing research on potential availability of critical minerals in the region by both the UK and Northern Ireland governments. The Critical Minerals Intelligence Centre (British Geological Survey) published a report identifying areas of the UK as prospective for critical raw materials – mid-Tyrone was

one of the eight locations highlighted.

More recently, the EU launched the Critical Raw Materials Act with the aim of increasing and diversifying supply, strengthening circularity and to support research and innovation. Under the Act, strategic projects would have priority status, i.e. a permitting decision within 24 months.

Patrick F.N. Anderson, Dalradian's President and CEO, said: "We are delighted to publish our fifth Responsible Business report marking our commitment to developing a multi-decade, modern mining project using the latest technology to responsibly produce the minerals society needs every day."

"Our achievements to date have come about because of the efforts of the great team we have on the ground in Northern Ireland supported by the strong backing of our North American owners and management team."

"To date, our US owners have invested more than \$400M in advancing the project and relationships have been developed with over 530 local suppliers. Building and operating the mine will see further investment of \$1.3 billion and creation of more than 1,000 jobs – one of the largest-ever US investments in Northern Ireland. We have built the foundations for a new industry in Northern Ireland – a once-in-a-generation opportunity that aligns with government aims around securing mineral supply, growing the economy, providing good jobs, increasing productivity, and regional investment."

Brian Kelly, Dalradian's Managing Director, added: "The report outlines our commitment to supporting the community, maintaining our environmental survey work to meet regulatory requirements

and highlights the importance of mining and minerals in society's shift to a decarbonized economy.

"Over 6 years on from submitting our plans to the Department for Infrastructure, our efforts remain focused on advancing our application to build a modern underground gold-silver-copper mine through the Northern Ireland planning system. We welcomed the release of the inquiry schedule earlier this year. The Pre-Inquiry Meeting was held in March and the hearing scheduled for September 2024.

"Although delighted to have progressed in the public inquiry process, we, along with all the other stakeholders, are disappointed that the schedule has since been suspended by the Planning Appeals Commission due to an administrative error, by DAERA, on our abstraction licence applications. Reapplications were immediately made for these consents, and we await new dates for the Statements of Case, Rebuttals and the inquiry itself. This is yet another opportunity for our planning application to be scrutinised by independent experts and provide a forum for consideration of public representations. It is a final step in a process that started in 2016 and which has included multiple public consultation events and opportunities to engage stakeholders.



Dalradian offset remaining emissions by supporting a safe water project in Zambia.

"We look forward to concluding the permitting stage of the project and delivering on the immense opportunities that the mine will bring to Tyrone and beyond."

About Dalradian

Supported by US investment, Dalradian has been working in Tyrone for more than 14 years, advancing its project which contains a mineral deposit of gold, silver and copper. The regionally significant project is currently in the

final stages of the planning process, with the aim of being one of the world's top underground mines utilising the best available technology for modern mining. In addition to precious metals, Dalradian has also been actively exploring throughout its licence area since 2010 for base metals, rare earths and other critical minerals.

DALRADIAN

DALRADIAN

1,000

direct, indirect and induced jobs will be created

£15M

initial three-year training package

£4M minimum

committed to future community projects

£750M

planned supply chain expenditure

20+ years

mine lifespan

We aim to build a modern underground mine that draws on Tyrone's heritage of engineering and manufacturing excellence to drive economic growth and community development in the local area and beyond.

INVESTORS IN PEOPLE
We invest in people Gold

Carbon Neutral
Programme

For more information visit: dalradian.com



FP MCCANN'S PRECAST CONCRETE WALLING LEADS THE WAY IN AGGREGATE STORAGE SOLUTIONS

FP McCann's range of precast walling products have been heavily utilised at its own facilities as product storage solutions and retaining walls during onsite expansion.

A dry aggregate storage shed was installed at FP McCann's Bradley's Depot in Kilrea, manufactured using precast horizontal wall panels. The storage shed was constructed using more than 1400 tonnes of concrete wall panels.

Our prestressed horizontal panels allow walls to be constructed quickly and efficiently. They are manufactured using prestressing wires and C45/55 concrete, which gives them in-built strength and resilience. Panels can be removed and re-sited, allowing the flexibility to change the configuration of a structure should future needs require it.

The shed offers a weatherproof storage option for aggregates, keeping them dry, separated and easily accessible. This method of construction could also lend itself well to a grain or silage store in an agricultural setting.



At the company's Omagh location, 6m bespoke L Walls were used as a retaining wall to provide an aggregate storage bay at the depot. A total of ten 6m x 2m L Wall sections were lifted into place, each having a capability of supporting retained material with a density of 20kN/m².

Johnny McCollum, Operations & Commercial Manager at FP McCann, said: ***"Precast walling offers an ideal solution for aggregate storage. Horizontal panels are a great option for a fixed structure, with L Walls offering the flexibility to be moved if required."***

FP McCann's panels are available in a 0.6m and 1.2m height, with three thickness options: 120mm, 160mm or 200mm; panel length can be made to suit the project requirements. Standard L Walls come in 1-3.75m heights, with larger custom-made units available from 4-6m in widths of 1m or 2m.





FP MCCANN DEVELOPS PROTOTYPE AI SYSTEM TO ANALYSE AND IMPROVE THE PERFORMANCE OF CONCRETE

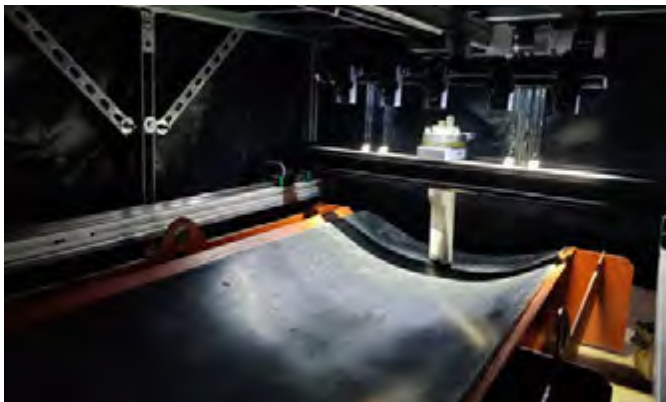
FP McCann's R&D team has developed and validated a prototype camera system designed to estimate particle size distribution, particle elongation and aggregate moisture level of material on a conveyor belt.

Optimisation of concrete requires continuous measurements of the raw materials, including the distribution of the size and shape of aggregate particles. Aggregate size and shape influence the quantity of binder and water required to achieve optimal hydration of the concrete mix, impacting its final strength and workability.

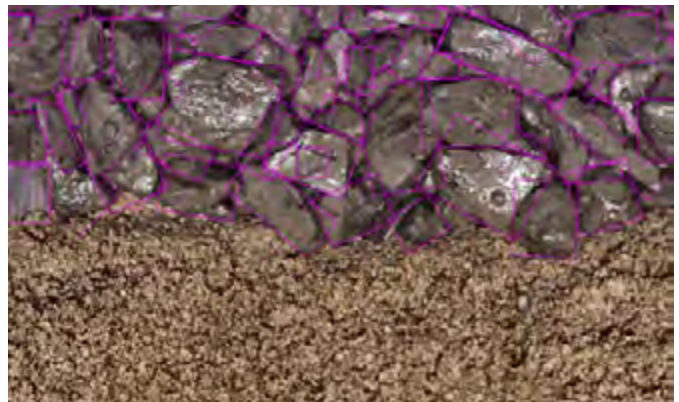
The system uses state-of-the-art computer vision technology to identify, classify and predict the properties of aggregate grains, imaged by a 60MP camera array. The project grant was secured through phase 2 of the AI for Decarbonisation funding call from the Department of Energy Security and Net Zero. The camera images the aggregate at a rate of 20 times per second. The aggregate within the camera field is illuminated by a high-intensity lighting solution, ensuring the detection of grains as small as 90µm.

The data is processed in real-time using 4 AI systems developed to process the images, measure coarse and fine aggregate regions, and detect non-mineral contaminants on the belt. Verification using traditional laboratory analysis has found the AI data to be a good estimation of the properties of the aggregate sampled.

The next stage of this project will aim to include these measurements in a real-time automated decision-making system, capable of applying small adjustments to the binder and water fractions, therefore improving the performance and quality of the final concrete mix.

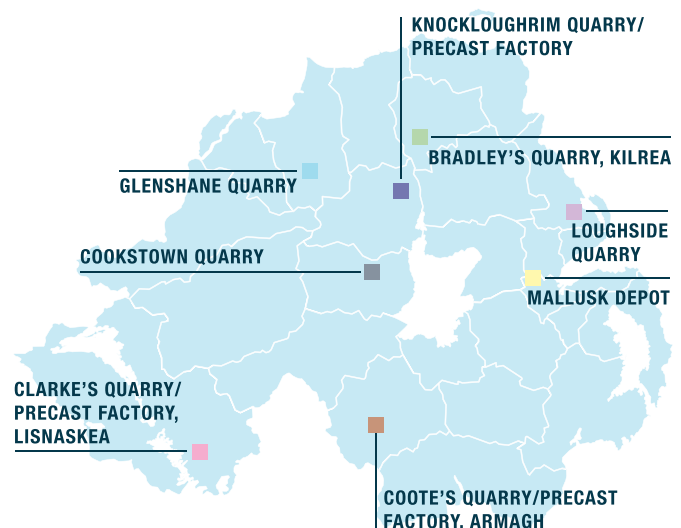


Camera array and moisture sensor inside a dark room over the experimental aggregate feed belt.



Aggregate on the conveyor belt at a transition between sand and gravel particles. Gravel particles are detected, marked with a bounding box, and measured by one of the AI models.

FP McCann offers an extensive collection of products to the construction industry in Northern Ireland. The precast concrete product range includes areas such as agriculture, building, drainage, fencing, flooring, and walling. Aggregates and building stone are also extracted from its portfolio of quarries throughout NI. In addition to this, FP McCann operates six Ready Mix Concrete plants, has an extensive range of bagged products, produces Dry Silo Mortar and offers both commercial and residential surfacing.



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MCL Consulting are industry leaders in environmental consultancy for the quarrying sector, based in Belfast and covering all of Northern Ireland and beyond.

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P McCann, McQuillan, Robinson Concrete, CDE Group, Barrick Hill & CFR. We have a long-standing reputation for efficient delivery on large and also small-scale quarry-related developments, and are regarded in the industry for our development-friendly approach to environmental assessments and mitigation. We ensure our planning applications and assessments are robust and fit for purpose, meeting all statutory requirements and maximising rewards. Our consultancy team have

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RTU believe in reinvesting in our people, our plant & our service. We strongly focus on creating a sustainable choice within the industry and endeavour to find new long-lasting solutions and opportunities for all our partners.

RTU: the family manufacturer expanding and planning for the future



Several of RTU's lorries

THE COMPANY

RTU has enjoyed considerable success over the last number of years, but this has not happened easily or by accident.

The success has been based on decades of hard work, determination, and passion, which has been instilled in the company's DNA by the founders and leaders of the business.

The company has grown organically since its inception in 1990, moving from a small site to its current five-acre purpose-built facility in Newtownabbey.

This growth and ability to withstand periods of recession and economic downturn has been based on a rigorous adherence to our three key company values: quality, passion and innovation.

As a family-owned business, grounded in the community in which we live, we pride ourselves on delivering high quality service and products to the market.

We understand that within a competitive market we need to focus on the customer and providing high-quality levels of service to ensure we meet and exceed their expectations.

To ensure a consistently high-quality product we have invested heavily in developing an automated production facility, a facility which has now grown to accommodate three batching plants to meet our customer requirements. We have also ensured our fleet is updated regularly with state-of-the-art vehicles and a recently constructed internal maintenance facility focused on preventative and controlled maintenance.

The German philosopher Georg Hegel stated that "nothing great in the world has ever been achieved without passion". This is certainly true of the RTU business where a hard work ethic, determination, and a relentless drive for quality and excellence has provided the template for growth.

RTU has a record of bringing innovative ideas and new products to the NI market.

This has been one of the foundation stones of our development over the years with the introduction of 'ready to use' tubbed mortar, eXposa decorative concrete, Zircon polished concrete, Ultrabead insulated flooring, Ultraflo and Ultracem liquid screeds.

These innovative products have been allied to

a range of internal processes and automation focused on achieving high levels of customer service.

These three values have driven our growth and clearly defined our vision which is focused on becoming the number one supplier of products and services within our chosen market.

FUTURE STRATEGY

In 2023, the new managing director of RTU, Alan Sproule, documented a comprehensive and ambitious four-year strategic plan.

This plan was communicated to employees in September 2023 at a company strategy day. The plan identified the key objectives of the business, documented the pillars of growth to deliver on the objectives and put in place a structure and process to implement it successfully.

The three pillars of growth are based on an FRE growth cycle:

1) Focus on our core business

This would be achieved by maximising and optimising all the opportunities that exist to increase market share within our current core business. We have identified a range of internal projects which are focused on protecting and expanding our supply chain, upskilling our



RTU directors pictured with one of its trucks

leadership and management team, structuring the business for expansion, maximising our existing assets and building an ambitious sales and marketing plan.

2) Replicating our core business model in another geographical territory

We have demonstrated the ability to succeed within our core business model and the skills exist within our existing team to replicate this at another facility. We are actively looking at acquisition opportunities within NI to achieve growth within this pillar. We have developed 7 key tests that we use to validate any acquisition opportunities and these act as a guide on whether we pursue such projects.

3) Expanding into adjacent businesses

This was our most ambitious pillar and is based on identifying businesses that exist within an adjacent sector to our current core model. We planned that any acquisition within this third pillar would be within a growth market and provide us with the opportunity to develop



Solar panels recently installed at RTU

business in new markets outside of NI.

These pillars of growth will drive our ambitious expansion plans over the next three years and provide a structured road map for the immediate future of RTU.

A key feature of the RTU strategic plan is a focus on sustainability and a corporate drive to engage with industry stakeholders to make a

positive impact on this issue.

The management team at RTU are currently working on an ESG strategy which will be launched later in the year. This strategy is focused on quantifying the positive impacts we currently make and identifying further opportunities that we can explore with customers, suppliers and other partners across business.

RTU ACQUIRES COLINWELL MASONRY PRODUCTS

In March, RTU completed the acquisition of Colinwell Masonry Products Limited. In early 2023 the board of RTU identified Colinwell as a company which fitted the profile of our third pillar of growth.

While Colinwell had a similar supply chain and customer base as RTU; their manufacturing process, range of products and access to the ROI and GB markets provided a unique opportunity for RTU.

During early negotiations we quickly realised the values, culture and ethos of both companies were very similar and this made the process much smoother.

Colinwell have traded for over 130 years as a family-owned business and developed innovative and niche products which they sell throughout the UK and Ireland.



The opportunity to build on the solid foundations of this business provided us with a unique chance to enter the GB and RoI market.

We are currently in the process of documenting an ambitious strategic plan for Colinwell which will be based on sustainable long-term growth.

It is an exciting time for RTU and the Colinwell team as we look to grow the business over the

next four years. The leadership team at RTU has spent considerable time in developing an ambitious growth plan and aligning our wider team to the objectives within it.

We know we can only grow and succeed as a business with a dynamic team displaying our values and delivering quality, innovative solutions for our customers.

Kilwaughter Minerals

At Kilwaughter Minerals, we continue to invest in our three market segments of construction, sustainable homes and agriculture under our brands K Rend, K Systems and Kilwaughter Lime.

Deeply embedded in the corporate culture is Customer Experience to achieve continuous customer excellence at every touch point and to deliver consistent quality products and solutions that add value to the lives of people. This is the core element of our strategic framework as we continue to drive significant organic growth and ambition for the future as we remain wholeheartedly invested in economic, social and environmental sustainability.

Our ESG strategy has six key pillars, including (1) sustainable research, product design and development and (2) community engagement alongside (3) climate change and carbon management, (4) plastic reduction and waste management, (5) employee health, safety and wellbeing and (6) business ethics.

The results of this have several tangible results including the recent launch of our EcoRange of products with reformulation of several of our solutions using cement replacement technology to offer reduced embodied carbon alternatives to our customers. Our R&D team invest their expertise to offer these products with the same high performance and value for our customers, whilst retaining a focus on ease of use as the construction industry remains challenged with skills shortages.

Our K Academy remains a vital strategic element to address these shortages as we offer a range of high quality training courses to enable companies to install and apply our products to peak standards and deliver premium solutions to property owners. This can allow warmer homes with reduced energy costs

and low maintenance properties with a crisp, fresh exterior. We also look forward to launching EPD's for many of our products, allowing our customers to understand the carbon implications for our products as they incorporate them into their projects.

Our commitment remains to making a positive impact to our communities through investment in education, employment, community needs and environment. We have defined partnerships with local schools and education facilities, long-term relationships with social enterprises, Queen's University and local charities and are proud to have become an ESG Business Backer of Youth Enterprise NI to support their well-established framework of educational outreach.

We look forward to continuing a relentless pursuit in these areas to drive positive change.

Kilwaughter

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 **Kilwaughter Lime**

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John McQuillan Contracts A3
Portadown Road Project

Building a Strong Future: McQuillan Companies and DFI's Lasting Partnership

McQuillan Companies proudly continues its longstanding partnership with the Department for Infrastructure (DFI). For many years, we have worked with DFI to deliver a wide range of Measured Term Contracts and Projects.

Our strong relationship is maintained through our four companies - John McQuillan Contracts, McQuillan Quarries, McQuillan Environmental, and McQuillan Outdoor. Together, we are committed to delivering the following contracts with the invaluable support of DFI.

John McQuillan Contracts

John McQuillan Contracts is the incumbent contractor on 4 DFI Interim Term Contracts for Asphalt Resurfacing. The contracts were procured over the period from September 22 to July 23 and include IAE 1 (Belfast North), IAS5 (North Down & Ards), IAE 3 (Lisburn & Castlereagh) and IAN 7 (Newtownabbey). The terms on these contracts range from 2 years to a potential 4 years. The works involve maintenance of the existing road network mainly through resurfacing and associated minor civil engineering works. John McQuillan Contracts also delivers

2 of the department's measured term surface dressing contracts. These include SDE 1 (Lisburn, Castlereagh and Belfast) procured in 2022 for a term of 5 years and SDS 1 (Armagh, Banbridge and Craigavon) procured in 2024 for a term of 3 years. In partnership with the Department, we provide a low-cost maintenance treatment to the road network by installing single, double and racked-in surface dressing.

In April 2024, we were also awarded the Term Contract for Minor Improvements MIE 1 (Belfast, Lisburn



and Castlereagh) for a term of initially 2 years up to a potential 5 years. The Contract involves a variety of works ranging from traffic improvement works to active travel projects.

The Department also issues several "Strand 1" larger isolated civils projects. In September 2023, we were awarded the A3 Portadown Road Resurfacing and Widening Works project. Working in partnership with the Department and its Consultant AMEY, we delivered this project on time in April 2024. The works included widening of the existing road, associated site clearance and drainage works and resurfacing on the busy corridor between Armagh and Portadown. In June 2024, we were awarded another Strand 1 contract titled "McKinstry Road/The Cutts/Derriaghy Road Junction Improvement Works." This project involves constructing additional lanes, upgrading junction signalisation and resurfacing on this busy arterial route between Belfast and Lisburn. The works are due to commence on September 24.



McQuillan Outdoor Flood Prevention Services.

McQuillan Outdoor

Awarded in February 2022, McQuillan Outdoor has been delivering two Environmental Maintenance contracts for the Department, including EME2 and EMS2.

These contracts encompass a range of services across the region, such as scheduled and responsive drainage

jetting and gully emptying, urban and rural grass cutting, weed spraying, verge maintenance, and planned and responsive tree maintenance.

Additionally, McQuillan Outdoor provided extra cleanup services, including road sweeping, following the flooding in South Down in November 2023.



McQuillan Quarries, Budore Quarry.

McQuillan Quarries

McQuillan Quarries supports John McQuillan Contracts by providing bituminous products and high PSV aggregates necessary for the aforementioned contracts.

These materials are processed and

manufactured at our Budore Quarry in Dundrod and Edentrillick Quarry in Dromore. Additionally, McQuillan Quarries supplies various DFI depots directly through various Supply and Delivery of Quarry Materials contracts.



McQuillan Environmental Analytical Services.

McQuillan Environmental

McQuillan Environmental is one of Northern Ireland's leading waste management companies, providing recycling and hazardous waste management to the region's leading companies throughout GB & ROI.

McQuillan Environmental assists John McQuillan Contracts in the delivery of DFI contracts by providing an analysis service to identify Coal Tar in existing carriageway surfaces through its UKAS accredited laboratory in Antrim.

Our laboratory will complete an initial PAK test on each asphalt core, the PAK test detects the presence of Polycyclic aromatic hydrocarbons (PAH) among tar in asphalt products, a detection of PAH will indicate the presence of coal tar and potential hazardous classification for disposal.

Once identified - waste is quantified, notification of movement is given to the NIEA then transport arrangements are made for treatment and disposal through a hazardous waste transfer station in Antrim.

We appreciate the continued support from the Department for Infrastructure in delivering these contracts and look forward to many more years of successful partnership.

If you would like information about any of McQuillan Companies' diverse range of services, please visit our website or contact us at marketing@mcqcos.com

www.mcquillancompanies.com



The forefront of sustainable construction solutions

Amid rising pressure to curb carbon emissions in the built environment, AG, a leading paving and building products manufacturer, is empowering customers to make environmentally conscious choices with the publication of Environmental Product Declarations (EPDs) for over 370 of its products.

According to the United Nations, the built environment accounts for nearly 40% of global carbon emissions. This stark statistic underscores the urgent need for the construction industry to significantly reduce its environmental impact to achieve Net Zero. Recognising this, AG, has positioned itself at the forefront of sustainable manufacturing, earning the title of 2024's Sustainable Manufacturing Company of the Year at the Business Eye awards.

EPDs are crucial tools that facilitate informed decision-making by providing clear, independently verified data on the environmental performance of products. AG's EPDs, verified by EPD



Hub, affirm the company's dedication to producing some of the lowest-carbon products in the UK and Ireland.

AG's use of recycled aggregates, Supplementary Cementitious Material to replace a percentage of cement in products, renewable

energy, and locally quarried materials underscores the company's dedication to sustainable practices.

AG's broader sustainability commitment is further evidenced by its significant reduction of Scope 1 and 2 emissions by over 47% from 2019 to 2023, despite increased production volumes. Additionally, the recent appointment of Michael Davies as Head of Innovation and Carbon Reduction highlights AG's focus on environmental stewardship.

His role will be pivotal in driving AG's innovation and leadership in decarbonisation, ensuring that the company remains at the forefront of sustainable construction solutions.



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Breedon Biodiversity

Breedon is a vertically integrated quarrying and construction materials company with over 320 sites across Great Britain, Ireland and the USA. Included in this i are two cement plants and an extensive network of quarries, asphalt plants and ready-mixed concrete plants, together with slate production, concrete and clay products manufacturing, contract surfacing and highway maintenance operations.

Alongside 4,450 members of staff, Breedon has the strategy of making a material difference to the lives of our colleagues, customers, and communities, with our products playing an essential part in creating a sustainable built environment for everyone. We have four core values; We are keeping it simple, We are making it happen, We are striving to improve and We are showing we care.

We aim to ensure that our actions and decisions are sustainable, balancing the long-term economic, social, and environmental impacts of our activities for the benefit of all our stakeholders, and this is actioned under the three key sustainability pillars of People (making a material difference to

society), Places (making a material difference to the built environment) and Planet (Making a material difference to the environment). These three focus areas are underpinned by our fundamental operating principals: health, safety and wellbeing, good governance, ethics and compliance, quality and stakeholder engagement.

Our commitment to environmental stewardship is broad, ranging from habitat conservation, restoration and tree planting to employee volunteering and tackling business challenges with nature-based solutions.

One of the key pillars of Breedon's Sustainability Strategy is to make a positive material difference to the environment – to reduce carbon,

manage waste, water and natural resources responsibly, and to improve nature and biodiversity.

Biodiversity is the amount and variety of life – plants, animals, microorganisms – on earth. Healthy ecosystems provide the food we eat, the water we drink, the air we breathe – and many ecosystems, such as forests and wetlands, store vast amounts of carbon in them too. By restoring and better managing nature we can help slow climate change and ensure healthy ecosystems for survival.

Breedon are uniquely positioned to do more for biodiversity than most other organisations. We have more than 15,000 hectares of land, great





relationships with the communities around our operations, and many engaged and enthusiastic colleagues who actively support nature on and around our sites every day.

Here in Ireland over the past 3 years we have developed Biodiversity Action Plans (BAPs) at 21 of our sites. These are bespoke to each site and include details on external BAPs, nature recovery networks, restoration mapping, habitat mapping, company biodiversity initiatives and specific action plans for each site. We have unique opportunities at our sites to create and maintain habitats for protected and listed species that may not otherwise exist in that area. Our annual breeding bird surveys conducted across our Ireland sites have recorded 25 red and amber listed species living in our sites. Site restoration plans are also managed in each BAPs, with ecological surveys having been completed on site to gain understanding into what flora and fauna already live on site. Bespoke site Biodiversity infographic signage has been created highlighting key biodiversity areas and accompanying biodiversity brochures have been created for each site.

At our Mullaghglass site, we have built a bespoke Bio-Hub which is used by the British Ornithological Society and Mullaghglass Wildlife Group, for training and recording purposes. It is also an area where staff can

come and learn about local wildlife. All recording that is done here is fed back into our BAPs and influences future work done on site. It is an important feature not just for the companies benefit but for the wider environmental community also.

During our annual Biodiversity week in May we showcased some of the fantastic biodiversity-focused activities taking place across our sites, from beekeeping, bird-ringing,

and dusk bats walks, to site visits from local school groups at our Bweeng Quarry in County Cork and Lobinstown Quarry in County Meath. The week culminated in a 24 BioBlitz at our Mullaghglass facility In Lisburn County Antrim on the 24th - 25th May. The BioBlitz involved a full 24-hour ecology study with over 25 scientists and ecologists visiting the site during the 24-hour period and recording the flora and fauna they





found. The event was attended by over 100 people many of whom were colleagues who came with their families to learn about nature and biodiversity. The highlight amongst many was the confirmation that the magnificent Barn Owl, *Tyto alba*, has quietly returned to the Belfast Hills to take up residence in an owl box erected at our spectacular Mullaghglass Wetlands. The Barn Owl is one of Ireland's rarest and most endangered birds. This is wonderful news for the Belfast Hills, for all the conservation charities working so hard across the area. During the 24-hour period over 700 different species of flora and fauna were recorded. Headline observations include resident Snipe, Cuckoo, all of Ireland's nesting migrant Warblers,

all four Raptor species, breeding Teal, Red Kite, Long Eared Owl, Ireland's four species of bat, newts, frogs, the emerging Dragonflies of Ireland, various mammals, and multiple, red-listed priority bird species breeding across the site. The moth list alone is eye-watering! This is a further piece of tremendous emerging conservation news that we are so proud to be leading in! We are committed to operating our business in a way that seeks to protect and enhance biodiversity across all our sites through the implementation of our biodiversity action plans and rehabilitation plans. We are very proud of the work that we are doing here at Breedon to protect and enhance biodiversity at our sites,

and we were delighted to have that work recognised by the following awards in the past 12 months. Sustainability Team of The Year at the Green Awards in Dublin in February. Aisling Awards- Guardian of the Environment, for Mullaghglass Restoration Project. Obtaining the Business in the Community Biodiversity Charter Platinum award.



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Orchard Fencing Ltd Upgrades Precast Production with Bespoke Rapid International Concrete Batching Plant

Rapid International Ltd (County Armagh, Northern Ireland) has recently supplied Orchard Fencing Ltd with a new bespoke static concrete batching plant, located in Erith, South-East London.

The plant is capable of production of up to 22m³ per hour of concrete and will produce precast fencing products.

About Orchard Fencing

Established in Welling, UK, in 1989 by the late Neil Hubble, Orchard Fencing Ltd, under the leadership of current Managing Director George Hubble, has expanded its operations with depots in Catford, Welling, and Erith. Serving London, Kent, and the wider south-east area, the company specialises in retailing and wholesaling fencing products and aggregates. Notably, in 2012, Orchard Fencing supplied security perimeter fencing for the London Olympics.

Outdated plant required upgrade

Motivated to focus more on precast fencing products and confronted with an outdated plant over 30 years old, the company recognised the necessity to invest in new production facilities. Reflecting on this, George Hubble – Managing Director, remarked, “My father and grandfather both experimented with concrete production, more as a hobby. I was interested in leaning more heavily into precast concrete production, due to our family history and in recognition of the demand for precast fencing products.”

Concrete Technology

It was after a conversation with Coote Engineering, during the purchase of a Coote dry cast machine, that the company learned of Rapid International and their extensive experience in the design and manufacture of custom batching plants.

The company subsequently contacted Victor Pickering of Concrete Technology Ltd, Rapid's GB mainland sales partner. Hubble added, “Victor was very helpful and knowledgeable. He conducted a thorough site visit, enquired about our requirements, and advised us on what specification of



plant would best meet these. He then passed this information to Rapid's in-house design team, who produced initial layouts, followed by 3D renders.”

He continued, “Victor also arranged a site visit to a previous customer of Rapid, Brett Landscaping, whose plant was installed 30 years ago and is still fully operational. Brett spoke highly of the plant. He also gave us a further 5 customer references, who we contacted, and who all spoke highly of Rapid.”

“Victor really put us at ease and together with Brett Landscaping, Coote Engineering and the five other customer recommendations, I felt confident that we were making the right decision and the plant was going to be good.”

The Rapid solution

Orchard Fencing's new bespoke Rapid concrete batching plant offers outputs of up to 22m³ per hour. The new plant has three 12.5 tonne aggregate hoppers, with integral 600mm weighed belt conveyor, which discharges into a mixer loading skip. This skip subsequently feeds a 0.75m³ output Rapid RP750 planetary mixer, which is housed on a mixer platform with the production facility. The platform allows for maximum access for maintenance and cleaning at mixer level. Two discharge chutes are located under the mixer doors to direct the material into the receiving hoppers on the Coote Engineering dry cast machines.

Cement is stored in an 80 tonne storage silo, with screw conveyor,



which conveys material from the silo to the weigh hopper. A 500kg cement/ powder weigh hopper is included, which is mounted on loadcells with aeration pads and a vibrator to aid in discharging. The plant also features a single compartment additive weigh system, which offers flexibility in additive batching.

To streamline mixer cleanout, the plant includes a Rapid Jetwash mixer washout system, fitted with 3 spray heads. The system operates at 2000 psi, offering high-pressure cleaning and maintenance of the mixer.

Enhanced Control and Productivity

The plant is fitted with a Pneutrol Dynamix batching control system,

which enables the operator to oversee the entire batching process and offers unlimited recipe storage, manual control via the PC and remote operation. The plant controls are housed in an anti-vandalism control cabin, ensuring security.

Automation - clever and user friendly

On the installation process, Hubble remarked, "We had a few minor issues at the start, but everything was taken care of by Keith (head of Rapid installation) and the installation team. Keith was brilliant and guided us through the whole process with organisation, attention to detail and precision. Everything has been no hassle and any minor issues we've

encountered have been sorted via a quick phone call. Installation was very professional and streets ahead of anything we've encountered."

On the plant, "We're really pleased with it! The steel work is heavy duty, unlike some of the alternatives in the market which can be really lightweight. It's nice to see it's been built properly and it's clearly going to last. The automation is very clever and user friendly – PIL were excellent. Aftercare has been very good."



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WOMEN'STEC: Empowering Women in the Construction Industry

Giving women and girls opportunities to explore careers in construction.

WOMEN'STEC is a registered charity based in Belfast and is Northern Ireland's largest quality provider of training for women in non-traditional skills. Through our services and a range of different programmes, we seek to reduce the barriers which either prevent, or make it difficult for women and girls to participate in education, training and employment. We engage with women and girls of all ages and courses including carpentry and joinery, car mechanics, I.T, electrics, plumbing, tiling, painting and decorating and bricklaying, amongst others. Over the years, our commitment has only strengthened, resulting in significant growth in both our programs and outreach.

WOMEN'STEC was established at a time when women had little opportunity to learn skills that are traditionally seen as men's skills - construction, trades, such as electrician, plumber, bricklayer, roofer, plasterer, etc., or to do DIY in the home. In response, a group of women came together to address this issue, and 25 years later, whilst the issue still holds true today - for example, only 1% of trades apprenticeships in Northern Ireland are undertaken by women - WOMEN'STEC has developed into the only organisation supporting women to break down the gender stereotypes



and barriers to women's participation in traditionally male careers.

Our work seeks to address several areas of need that disproportionately impact on women in Northern Ireland: higher levels of economic inactivity; greater barriers to education, training and employment; education experienced largely along gendered lines; the disproportionate effects of the pandemic; the cost-of-living crisis; and declining mental health and wellbeing.

Whilst encouraging and enabling women into careers in construction and other sectors where women are underrepresented is our mission, through experience, we have demonstrated the power of developing these skills to improve other aspects of women's lives e.g. confidence, self-belief, motivation, greater independence, social connection, and support, which lead to transformative outcomes and increased opportunities in life and work.





Inaugural Breakfast of Champions Morning at WOMEN'STEC HQ, Belfast, June 2024.

Promoting Opportunities Programme: #NotJustForBoys

WOMEN'STEC launched the Promoting Opportunities Programme #NotJustForBoys, our flagship youth programme in 2019. Overall, it aims to increase awareness amongst young females of the wide array of career opportunities available to them in sectors where women are typically underrepresented, such as construction or transport.

Statistics show that girls typically choose traditionally viewed female career paths such as hairdressing, beauty or childcare. Salaries linked to these professions are generally lower, employment less secure, and progression opportunities limited. This compares unfavourably to traditional male professions such as those in construction or engineering where salaries are higher and there are more opportunities for career progression. #NotJustForBoys gives young women the chance to explore potential career paths, pick up practical skills and hear from inspirational industry leaders through 'do it yourself' sessions, site visits and gender workshops.

#NotJustForBoys Champions: A Strategic Partnership with Industry

As WOMEN'STEC's profile and reputation continued to grow within the industry, we recognised that in order to create the pathways needed for women and girls to explore and consider careers in construction, we need the support of and collaboration with the industry and therefore, in March 2022, we launched our #NotJustForBoys Champions.

For £500 a year, a business signs up to become a '#NotJustForBoys Champion.' This allows the Champion access to our 'We are a #NotJustForBoys Champion' logo to proudly display on their website,

promotional materials and to use in procurement bids, promoting their commitment to gender equality and diversity. Champions are also our first port of call for partnering with industry on our programmes and in seeking work experience, apprenticeships, training or employment opportunities in the industry for the women and girls we are supporting. Their company logos with links to their websites are also added to 'Our Champions' section of our website and every Tuesday, we 'Champion our Champions' through our #ChampionTuesdays social media campaign, highlighting the collaboration and partnerships created to deliver social impact. We also distribute a quarterly 'Champions' newsletter to share stories of impact, collaboration and partnerships with Champions and opportunities to collaborate with us.

We currently have 24 businesses signed up as #NotJustForBoys Champions, including our Champion, the Mineral Products Association Northern Ireland, who are leading the way in advocating to help change the image of construction and its supply chain to be a more welcoming and inclusive sector for women and girls.

The key motivations for businesses to become champions includes:

- Support for gender diversity
- Social value goals
- Industry reputation
- CSR goals

Whilst becoming a Champion and proudly supporting our work is the basic commitment of Champions, we have found many who are keen and willing to actively engage in our programmes and services.

The ways in which some Champions have become involved include:

- Hosting industry site visits for our students
- Sponsoring a summer scheme or a women's DIY programme
- Donating materials and equipment

for courses and our workshops

Supporting women into apprenticeships or paid employment

Speaking and/or attending careers events

Speaking at WOMEN'STEC events

There are many ways for Champions to actively support our work and we do this through partnership and collaborative working to ensure it meets the needs of both WOMEN'STEC and the Champion. This initiative has brought industry closer to a talent pool that has previously been difficult to access, whilst also strengthening the industry's engagement with the community and voluntary sector to deliver social value outcomes in public procurement. As more businesses commit to bridging the gender gap and creating a more welcoming and inclusive work environment, we will begin to see more women entering the workforce that will work to reduce the skills gap that the construction industry faces. WOMEN'STEC are proud to partner with industry as we all work towards a common goal of reducing the barriers for women to pursue careers in industries such as construction, engineering, IT or manufacturing.

WOMEN'STEC Newry: The power of social value in public procurement

Recognising the unique challenges faced by women and girls in rural areas, and in response to growing demand, WOMEN'STEC opened a second workshop in Newry City and introduced outreach classes to bring our training programs to isolated, rural communities across Newry, Mourne and Down, in late 2022.

This was made possible through a social value initiative led by CTS, a leading facilities management company. CTS was awarded a maintenance contract for the Housing Executive in the Newry, Mourne

and Down region, which included a social value delivery plan. CTS committed to investing approximately £100,000 with two social enterprises to deliver outcomes in the region.

This cross-sector partnership between CTS, WOMEN'STEC and Bolster Community brought a programme of DIY, construction skills and personal development to women and girls in Newry City and the wider rural communities throughout Newry, Mourne and Down. Overall, the programme created 1 x full-time job, engaged 266 women and girls in DIY and construction skills training, personal development and wellbeing programmes, school engagement taster activities and careers in construction awareness events.

Our outreach programmes have proven to be well-received and incredibly successful. We offer training in the remotest of community halls, collaborating with rural organisations to break down geographical barriers and make education and training accessible to all women, regardless of their location. The effect of these classes was visible in the participation and levels of success for women from rural areas in our programs. Women that have gone through our programmes have moved into employment and become role models themselves and other students.

This cross-sector collaboration between CTS (a private sector maintenance contractor), WOMEN'STEC (a charity and social enterprise) and Bolster Community (a charity and social enterprise),

is a great example of the power of social value through public procurement and in 2023, CTS won the Best Cross-Sector Collaboration Award at the Social Enterprise Northern Ireland annual awards.

A significant legacy of this project is the strong partnership formed between two social enterprises that enabled further investment to be secured for the Newry, Mourne and Down region for the next two years. Together, Bolster Community and WOMEN'STEC, with the addition of Women in Business NI, formed a partnership bid to the UK Shared Prosperity Fund to expand the programmes and services across the Newry, Mourne and Down and Belfast regions, securing just over £879,000 to support 420 economically inactive women to move closer and to re-engage with the labour market.

This would not have been possible without the collaboration with CTS, demonstrating the legacy of this cross-sector collaboration to bring even more investment into rural communities for the next number of years.

Looking to the future: WOMEN'STEC Derry and new facilities

In September 2023, WOMEN'STEC celebrated 25 years of supporting women and girls across Northern Ireland. Attended by industry partners, funders and supporters, we launched our new strategy outlining our strategic aims and priorities over the next four years as we commit to creating an inclusive, sustainable society and economy where women and girls can

reach their full potential and thrive.

Our next, exciting development is the opening of a third workshop space in Derry City, due in late 2024. This will enable us to bring our programmes and services to the north west region where there has been significant interest and demand for our work over the years. This will bring an abundance of opportunities for the industry to collaborate with us on creating opportunities for women and girls to experience DIY and construction skills.

A longer-term ambition for WOMEN'STEC is to build a new home for our headquarters in Belfast. Our significant growth over the last number of years has seen us outgrow our building and we require more workshop, training, staff, outdoor and specialist space in Belfast. This will be a significant capital project that will take many years, but our students deserve an inspiring space to learn, experience and develop their skills for the future.

If you are interested in learning more about how we can work together, please contact Helen Kerr, Head of Business Development at helen.kerr@womenstec.org or visit www.womenstec.org



Gordon Best, MPANI attending 'Breakfast of Champions' event at WOMEN'STEC in June 2024.



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Project Profile: Translink Belfast Transport Hub

Project Overview The Translink Belfast Transport Hub is a significant infrastructure project aimed at enhancing Northern Ireland's transportation network.

With a project value of £208 million, the hub is set to become a key interchange for bus, rail, and coach services. Key contractors involved in the project include Graham Construction and Farrans Construction.

Tracey Concrete is proud to supply a range of high-quality precast drainage products to this transformative project. Our innovative solutions are designed to meet the stringent

demands of modern infrastructure developments, ensuring efficiency, durability, and cost-effectiveness.

Products Supplied

Perfect Base Manhole System:

Our Perfect Base Manhole System is a cutting-edge solution that enhances installation speed and accuracy while significantly reducing on-site labour requirements. These manholes are factory-made to the highest

standards, ensuring a perfect fit and superior performance compared to traditional insitu methods.

Precast Concrete Pipes:

We supply a comprehensive range of precast concrete pipes, known for their robustness and long lifespan. These pipes are essential for the efficient drainage of stormwater and sewage, ensuring the transport hub remains operational even in adverse weather conditions.



Cable Trough Channels:

Our precast cable trough channels are vital for protecting communication cables and utilities. These channels provide a secure and accessible route for cables, ensuring the uninterrupted operation of critical communication systems within the transport hub.

Advantages of Offsite Precast Products

Using Tracey Concrete's offsite precast products offers numerous

advantages over traditional insitu construction methods. Precast solutions are manufactured in a controlled environment, ensuring consistent quality and reducing the risk of on-site errors.

The efficiency of installation is significantly improved, leading to shorter project timelines and lower overall costs. Moreover, offsite manufacturing minimises the environmental impact by reducing waste and the need for on-site machinery and personnel.





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Tobermore Decarbonisation

Tobermore is taking the lead in local decarbonisation efforts in line with the company's goal of achieving carbon net-zero targets within the upcoming decades. ESG has become a key priority for the business, reflective of the government's environmental targets and the groundswell of support within the construction industry for more responsible manufacturing.

Understanding that environmental responsibility is a cooperative effort that cannot be achieved within a vacuum, Tobermore is taking a collaborative approach with local businesses in Mid-Ulster to tackle sustainability issues.

Thanks to the groundbreaking efforts of the Centre for Advanced Sustainable Energy (CASE) at Queen's University, Tobermore is a founder member of the Mid-Ulster Carbon Cooperative, a partnership

of businesses endeavouring to transform excess agricultural waste into biomethane fuel.

The ultimate goal is to produce enough energy for business use as well as injecting surplus energy into the NI gas grid. Tobermore was also delighted to take delivery of the UK's first biomethane fuelled forklift in 2023, part of a forward-thinking trial to eventually replace the firm's 60 diesel forklifts with biogas trucks. Tobermore has also committed to

planting up to 10,000 trees a year at its Lough Fea quarry, coupling this goal with a land restoration plan that falls in line with the company's decarbonisation strategy.

As another example of environmental sustainability necessitating a collaborative approach, Tobermore partnered with Scottish Woodlands to plant 2,970 trees over 2.28ha of old gravel areas.

The trees were carefully selected to help sequester carbon as part of

the company's net-zero strategy in line with Scottish Woodlands' vision of growing a sustainable future.

Keen to avoid complacency, Tobermore seeks to expand on its efforts to source more renewable energy to enhance the company's green credentials. Having previously installed 1250 solar panels, the company recently more than trebled this to 4059 with an impressive 1579kW output. In another nod to the collaborative nature of ESG, Tobermore was pleased to partner with Solmatix, a leading provider of renewable technologies, to carry out this important work.

The company also has its own 250kW wind turbine as part of a dual pronged energy project to eliminate reliance on fossil fuels. Already supplied with 100% green energy, as verified by Power NI, it is the company's ambition to supplement this with as much renewable energy as possible.

Tobermore's efforts have received industry recognition, with the company being named 'Sustainable Manufacturing Business of the Year' at the Business Eye Sustainability Awards 2023. Richard Buckley, chairman of the Business Eye judging panel, commented:

"Tobermore's was a stand-out



entry in the highly competitive manufacturing category. In an industry with some significant environmental challenges, Tobermore has made huge strides towards embracing sustainability throughout both its manufacturing process, as well as its organisation as a whole."

In addition to the company's environmental efforts, Tobermore's commitment to ESG is embodied in a diverse workforce right up to the senior leadership team, 44% of which is female. Tobermore stands ready to embrace the future of construction, with ESG being a key business objective.



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Building the Future with Creagh Concrete

In the landscape of construction and infrastructure development, few resources are as foundational as concrete and aggregates. They form the bedrock of our homes, roads, bridges, and commercial structures.

At the forefront of this essential industry stands Creagh Concrete, a company whose dedication to quality, sustainability, and innovation has made it a cornerstone of the construction sector. Creagh Concrete, established in 1974 is a family owned business which recently celebrated 50 years in business.

In June 2024, the Company acquired the Norman Emerson Group a County Armagh based family run business which specialises in readymix concrete, sand and aggregates therefore not only strengthening

Creagh Concrete's range of products but also its geographical reach.

The Backbone of Modern Construction

Creagh Concrete has been a stalwart in the quarries and aggregates business for decades, consistently providing high-quality materials that meet the rigorous demands of modern construction.

Their extensive portfolio includes a wide range of products, from ready-mix concrete to specialized aggregates, all tailored to suit various applications. This versatility ensures that whether

it's a residential project or a major infrastructure development, Creagh Concrete can deliver the materials needed to get the job done right.

Creagh Concrete boasts 8 readymix plants across 5 locations and 5 quarry sites making it one of the largest producers of materials in Northern Ireland.

Commitment to Quality

Quality is the hallmark of Creagh Concrete's operations. The company's quarries are equipped with state-of-the-art technology and operated by highly trained personnel, ensuring that



every batch of concrete and aggregate meets the highest standards. Rigorous testing and quality control measures are embedded at every stage of production, from extraction to delivery. This unwavering commitment to excellence has earned Creagh Concrete a reputation for reliability and consistency, making them a preferred supplier for numerous high-profile projects.

Sustainability at the Core

In an era where sustainability is paramount, Creagh Concrete is leading the way in adopting environmentally friendly practices. The company is deeply committed to reducing its carbon footprint and promoting sustainable resource management. This includes investing in energy-efficient technologies, optimizing extraction processes to minimize





environmental impact, and exploring innovative recycling methods.

Creagh Concrete's dedication to sustainability not only helps protect the environment but also sets a standard for the entire industry.

Innovative Solutions

Innovation is another cornerstone of Creagh Concrete's philosophy. The company continually invests in research and development to stay ahead of industry trends and meet the evolving needs of their clients.

This includes developing new concrete formulations that offer enhanced durability, strength, and versatility.

Additionally, Creagh Concrete is at the forefront of incorporating digital solutions into their operations,

improving efficiency and customer service through the use of advanced software and data analytics.

Building Communities

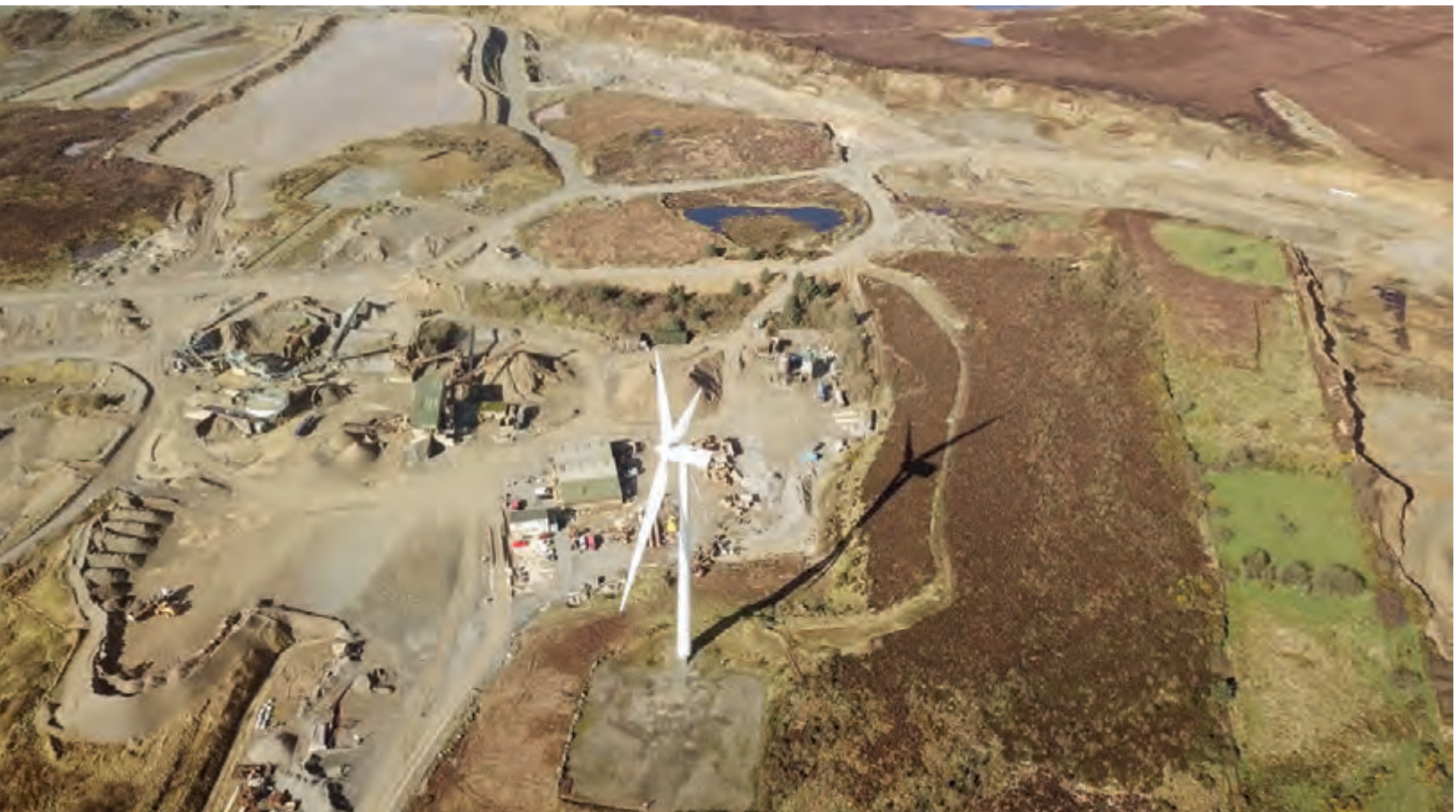
Beyond their business operations, Creagh Concrete is deeply invested in the communities they serve. The company supports local initiatives, provides employment opportunities, and engages in philanthropic activities.

This community-centric approach not only strengthens their relationship with the local populace but also underscores their commitment to social responsibility.

Creagh Concrete exemplifies what it means to be a leader in the quarries and aggregates business. Their dedication to quality, sustainability,

innovation, and community sets them apart in a competitive industry. As we look to the future of construction and infrastructure development, Creagh Concrete is poised to continue playing a pivotal role, building not just structures, but the very foundation of progress and prosperity.

In an industry where the materials used can make or break a project, Creagh Concrete stands as a beacon of reliability and excellence. Their ongoing efforts to improve and innovate ensure that they will remain a key player in shaping the built environment for generations to come.





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Whether it is a rigid tractor unit, cement mixer or heavy-duty tipper, the road and all-wheel-drive variants of the Arocs provide an especially robust, resilient vehicle optimally prepared for almost any construction haulage challenge.



Built for particular challenges: the Arocs is at home in construction haulage. It does this by offering more ground clearance.

This includes:

- A large angle of approach
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- A choice of wide or narrow frame track for more off-road capability
- An entire axle portfolio up to the possibility of ten tonnes of front axle load and many other features
- A well-thought-out overall concept, regardless of whether it's a concrete mixer, flatbed, tipper or semitrailer tractor

All cab variants offer the driver a comfortable workplace. While working, the driver benefits directly from comfortable seats, the multifunction steering wheel and the PowerShift Advanced automatic gearshift system, with faster shifting times and shorter interruptions in traction. Other highlight include the optional MirrorCam and the electronic parking brake.

Unbridled Power, Restrained Fuel Consumption

The powerful, robust Arocs engines incorporate advanced, particularly efficient Euro VI technology. On top of this, they have exactly the force

you need daily for hard operations in construction haulage. The PowerShift Advanced automated gearshift boasts high driving comfort, precise gear selection, efficient power transmission and enhanced handling.

18 Engine Power Output Levels

The exceptionally long-lived 6-cylinder in-line engines of the Arocs fully cover all performance requirements in construction transport.

For optimum job matching, the fuel-efficient Euro VI engines are available in the four displacement classes 7.7 l, 10.7 l, 12.8 l and 15.6 l.



The Best Seat is Reserved for The Driver

During the first test drive and after countless trips, the Arocs cabs demonstrate what distinguishes a modern workplace: exemplary ergonomics, high functionality, and many practical details that make a difficult job much more manageable.

Safety is in our DNA

It's all about getting you there safely. With the support of innovative assistance systems intended to increase driving safety, such as Active Brake Assist 5, which comes as standard, strain on the driver is actively relieved while

the vehicle and load are treated with greater care, and the overall efficiency increased. On every trip!

Very safe trucks are not just an important development for all road users. They are also more efficient

because they are less often put out of action by accidents, and they relieve the driver's workload. That is why we have been focusing on developing innovative assistance systems for over 45 years.





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For particularly high-load capacity and extreme conditions, the Arocs Loader and the Arocs Grounder are two construction specialists that excel where it matters: on the construction site.

The Arocs provides particularly efficient construction transport. The Arocs Loader and the Arocs Grounder are available to ensure this hallmark efficiency in tough conditions and payload-sensitive operations – when tipper vehicles and concrete mixers are deployed, for example.

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Arocs Grounder

The tractor units and rigid chassis, including tippers and concrete mixers configured for especially tough operations, are front runners in terms of stability and robustness.

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- 1 Where a company is applying for membership this form must be completed in full by the secretary or a director of the company.
- 2 When completed this form should be sent to MPANI Ltd, Nutts Corner Training Centre, 17 Dundrod Road, Crumlin, Co Antrim, BT29 4SR

PLEASE COMPLETE THIS FORM IN FULL

USE BLOCK CAPITALS

Company Name:

Address:

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..... Postcode:

Telephone Number:

Fax Number:

Contact Name:

E-mail Address:

PRODUCTION AND PROCESSING UNITS (including details of Associated Companies)

(Details of Concrete Blocks, Cement, Quarries, Pits, Ready Mix, Black Top Processing Units)

NUMBER OF PLANTS/OUTLETS (Please provide details overleaf)

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SAND AND GRAVEL	☐	(Inc blocks, rooftiles, pavia, pipes, floors etc)	
QUARRIES	☐	CEMENT	☐

We hereby apply to become an member of Mineral Products Association Limited and agree to be bound by the Articles of Association and any rules made thereunder by the council of the Association.

Date:

Signed:

(Director, Secretary or Partner)



Application for Affiliate Membership

NOTES FOR GUIDANCE:

- 1 Where a company is applying for affiliate membership this form must be completed in full by the secretary or a director of the company.
- 2 When completed this form should be sent to **MPANI Ltd, Nutts Corner Training Centre, 17 Dundrod Road, Crumlin, Co Antrim, BT29 4SR**

PLEASE COMPLETE THIS FORM IN FULL

USE BLOCK CAPITALS

Company Name:

Address:

.....

..... Postcode:

Telephone Number:

Fax Number:

Contact Name:

E-mail Address:

MAIN FIELD OF ACTIVITY (e.g. plant supplier, finance, quarry product user, consultancy)

.....

.....

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We hereby apply to become an affiliate member of Mineral Products Association Limited and agree to be bound by the Articles of Association and any rules made thereunder by the council of the Association.

Date:

Signed:

(Director, Secretary or Partner)



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John Moore, Conexpo
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Conor Jordan, Norman Emerson Group
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 Collen Brothers (Quarries) Limited
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