

IRELAND INC

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Irish CEO Outlook 2018

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#CEOoutlook

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IAN HYLAND

FOREWORD

As we launch this most important Index, which details the focus and future of Irish business investment across the United States, I am reminded of Warren Buffet's words: "Someone's sitting in the shade today because someone planted a tree a long time ago." Through incremental steps and small roots, Ireland's footprint in the US has continued to progress in line with the successes of our best indigenous companies. While the seismic impact of US investment in Ireland is well-articulated, the true symbiosis in the economic relationship between our two countries can be often overlooked. The Ireland INC Index, in association with our partners KPMG, and working with Irish and US state agencies, aims to address this by highlighting the true scale and success of the investment that Ireland's top companies have made across the United States.

The latest figures from SelectUSA and the US Department of Commerce, released in February, put Ireland as the eighth largest source of FDI in the United States in 2016, a truly remarkable feat for a nation of our size.

Irish businesses have invested well over \$85bn in the US already and as the Index outlines the trajectory of these Irish companies, it is clear that this figure will only rise further.

Ireland INC continues to take seriously its role of telling this story and providing platforms to further critical dialogue. Ireland remains the only country to host a day at the New York Stock Exchange, with Ireland Day celebrating its eighth instalment in 2018. The Ireland INC Index is another important tool that will become a pillar of the business community in identifying the companies leading the way in the United States and affirming Ireland's strong footprint in this regard.

I look forward to working with our partners KPMG, our friends in the Irish and US governments and Irish business to continue building this Index providing a vital source of information and guidance to the wider market. I welcome your engagement as leaders of Irish business in this regard and congratulate all of our indexed companies on their ongoing successes.

IAN HYLAND
President, Ireland INC



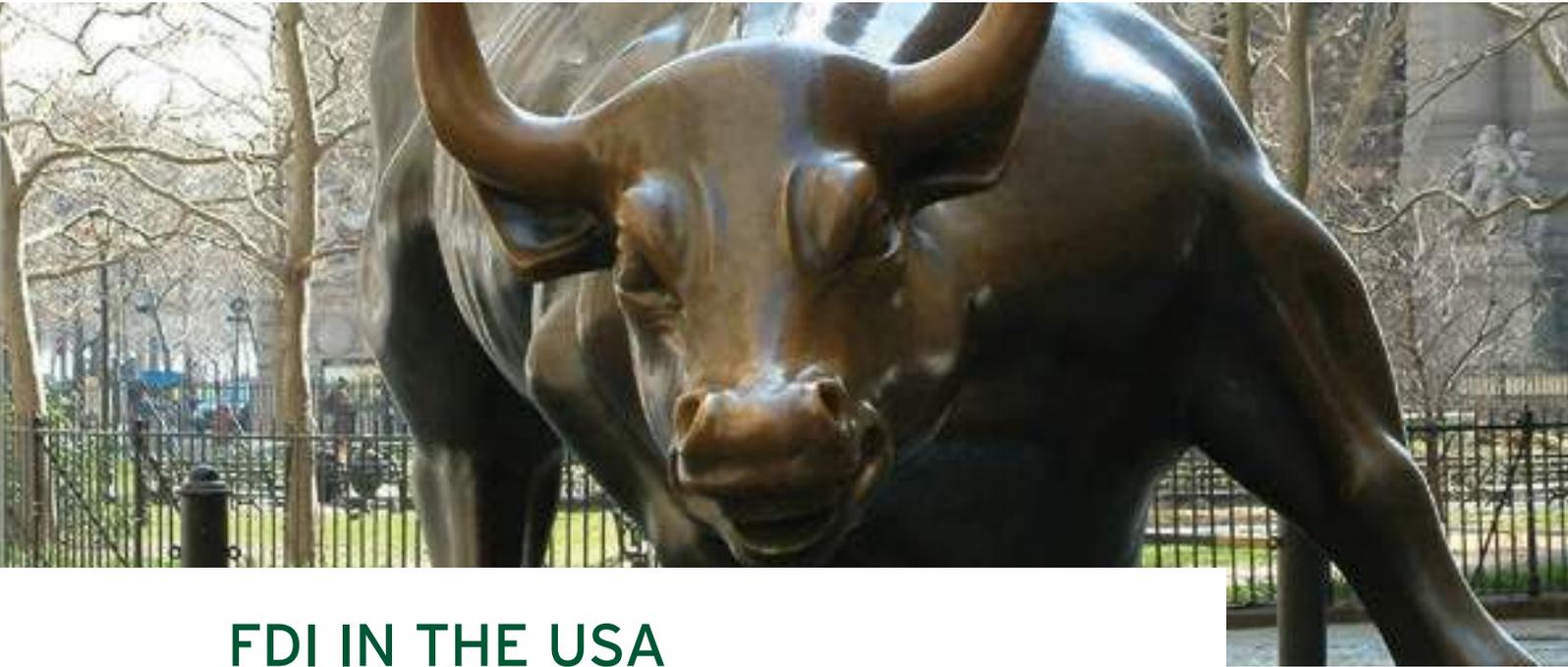
SHAUN MURPHY

FOREWORD

As this report highlights, the economic relationship between the United States and Ireland is one of deep mutual benefit. Irish investment in the US has gone from strength to strength over several decades. Many of Ireland's leading companies have invested in the United States creating high value employment in many areas. The valuable multiplier effect of this commitment is often reinforced, for example, by additional research and development investment. Meanwhile, Ireland provides US businesses with a gateway to the European Union and guaranteed long-term access to a market of almost 500 million customers.

In every case, the opportunities created by this relationship are highly significant. For Irish companies investing in jobs and other economic activity in the United States, it means proving their capabilities in one of the most discerning and demanding markets in the world. For US business using Ireland as a base to trade successfully with the European market, Ireland provides a stable, pro-business environment committed to supporting their continued success on a global basis. I hope that this report will provide policy makers and others with valuable insights into the benefits of our enduring business and wider relationships and the jobs sustained on both sides of the Atlantic as a result.

SHAUN MURPHY
Managing Partner, KPMG in Ireland



FDI IN THE USA

“The North American economies of the US and Canada are in fine shape. Excess supply in their labour markets is enabling firms to increase hiring; larger workforces are boosting consumer spending; and rising private consumption is encouraging firms to invest.”

The Economist Intelligence Unit, EIU global forecast, May 2018

The US economy had a positive start to Q1 in 2018, with tax cuts and fiscal stimulus promoting firm inflation and growth expectations and pushing the stock market up. However 9 out of 11 equity sectors representing key areas of the US economy closed Q1 in negative territory after uncertainty stimulated volatility and drove prices down. Despite elevated valuations, Technology and Consumer Discretionary were the leaders after both enjoying a positive quarter.

11 Sectors of the US Stock Market

Financials / Utilities / Consumer Discretionary / Consumer Staples (incl Food & Beverage) / Energy / Healthcare / Industrials (incl Construction) / Technology / Telecom / Materials / Real Estate



The USA remains an attractive destination for Irish FDI for many reasons, including its large consumer base, common language and innovative pro-business environment.

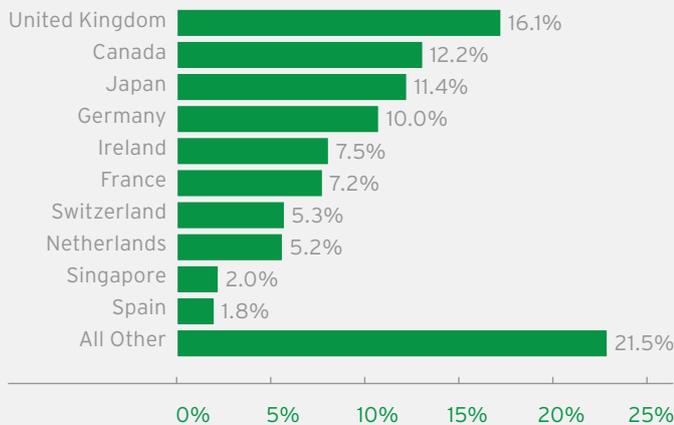
The USA is the largest recipient of FDI in the world:

“In 2016, the foreign direct investment position, or the stock of foreign investment, in the United States was \$3.7 trillion on a historical-cost basis, \$6.6 trillion on a market value basis or \$4.4 trillion on a current-cost basis.”

Office of the Chief Economist, US Dept of Commerce

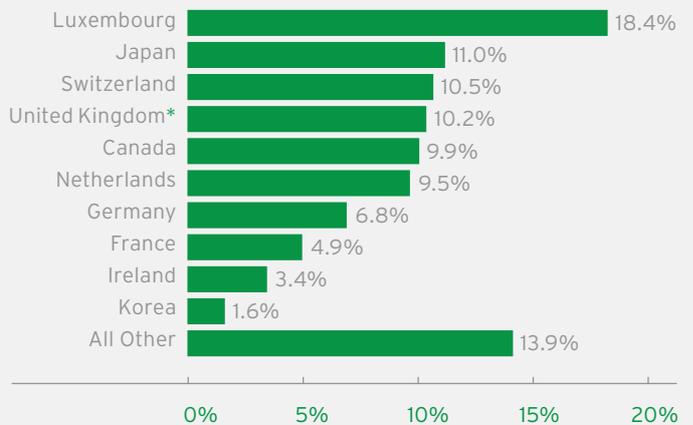
From figures released in 2017 by the Office of the Chief Economist and SelectUSA, Ireland was the eighth largest source of FDI to the US in 2016, and ninth overall in the period from 2010-2016 (see graph), with advanced economies, led by the United Kingdom, Japan, Canada and Germany, leading the pack.

FDI Position In the U.S. - Top 10 Investor Countries by Ultimate Beneficial Owner (UBO), 2016



Source: Department of Commerce, Bureau of Economic Analysis. Note: Ultimate Beneficial Owner (UBO) measure of investment attributes FDI ownership to the country of the highest level decision maker in a company's ownership chain. The measurement removes data distortions that may arise from the FDI into the United States that passes through intermediary countries.

FDI In the U.S. - Financial Inflow Transactions w/o current-cost adjustment: Top 10 Investor Countries 2010-2016



Source: U.S. Bureau of Economic Analysis. *Includes "United Kingdom, Caribbean", comprised of British Virgin Islands, Cayman Islands, Montserrat, and Turks and Caicos Islands.

Acquisition is the most popular means of investment:

“Greenfield investment by foreign entities—defined as a foreign investment either to establish a new U.S. business or to expand an existing foreign-owned US business by adding a new facility—totaled \$7.7 billion. Expenditures on establishing new businesses totaled \$5.6 billion while spending on expansions of existing US affiliates was almost \$2.2 billion. Foreign investors spent \$365.7 billion in acquiring US companies in the same year [2016].”

Office of the Chief Economist, US Dept of Commerce



TOP IRISH COMPANIES IN THE US, BY NUMBERS EMPLOYED

01

CRH
(OLDCASTLE)
40,000
EMPLOYEES
IN THE US

Oldcastle is the North American arm of CRH plc., one of the world's leading building products and materials companies based in Dublin, Ireland. It is the largest building materials company in North America with more than 1,700 operations in 50 US states and 6 Canadian provinces.

CRH's Americas Material business has operations in 43 states, whilst its Americas Products business is in 38 states across the US. In 2017, its US businesses generated €14.64 billion in revenues, or 52% of group revenues.

CRH plc was formed through a merger in 1970 of two leading Irish public companies, Cement Limited (established in 1936) and Roadstone, Limited (1949). Group Chief Executive Albert Manifold has been leading the business since January 2014, after joining in 1998 as Finance Director for CRH's Europe Materials division where he helped to build CRH's position in Eastern Europe.

Today, CRH is one of the world's leading building materials companies, with a business that spans 32 countries and which serves all segments of construction industry demand. CRH subsidiary companies employ over 85,000 people at around 3,600 locations around the world and generated sales of €27.6 billion in 2017.

In 1978 CRH made its first move into the United States with the acquisition of Amcor, a concrete products company based in Utah. The foundation of what is now the Americas Materials Division commenced in 1985 with

the acquisition of Callanan Industries, an aggregates and asphalt company in Upstate New York.

The 1990s saw the establishment of a new growth area for the Americas Materials Division with the acquisition of Staker, a major quarry and blacktop business in Utah and the mountain states.

In 1996 the purchase of Tilcon for \$323 million was CRH's largest acquisition at that time, establishing a unique regional position in materials in the Northeastern US. The acquisition of Allied Building Products gave CRH a fifth core business in the US and a first presence in distribution.

The acquisition in 2006 of Ashland Paving And Construction (APAC) for US\$1.1 billion (net of disposals), was then the largest single transaction completed by the Group and APAC brought into the fold 9,700 employees, across 93 aggregate production facilities spread over 14 Southern and Midwestern states. In September last year CRH confirmed the acquisition of Ash Grove cement business would go ahead, paying \$3.5bn for the fifth-largest US cement manufacturer with eight cement plants across eight US states.

A Fortune 500 company, CRH is a constituent member of the FTSE 100 index, the EURO STOXX 50 index, the ISEQ 20 and the Dow Jones Sustainability Index (DJSI) Europe. CRH's American Depositary Shares are listed on the New York Stock Exchange (NYSE).

Ardagh is a global leader in glass and metal packaging, with 39 sites across the US employing over 7,000, out of a global staff of over 23,500 in 22 countries. Founded in 1932 as the Irish Glass Bottle Company in Dublin, the company expanded through a series of acquisitions after Paul Coulson, the current Chairman and CEO, acquired an initial stake in the company in 1998.

Greencore Group plc is a leading international convenience food company. It was established by the Irish government in 1991 when they privatised Irish Sugar, and is today the world's largest sandwich manufacturer. Headed up by Patrick Coveney and listed on the London Stock Exchange, it is part of the FTSE 250 Index. Greencore's US headquarters is in Chicago, with numerous further operations in Illinois, as well as California, Virginia, Florida,

Having commenced operation from a green field site in Listowel, Co. Kerry in 1972, the Kerry organisation has evolved from a private dairy processor, to a dairy co-operative, to its current incarnation as a public company with annualised sales of approximately €6.4 billion, and operations established in 27 countries across five continents. Kerry began exporting dairy ingredients to the US in 1972 and opened its first overseas food ingredients manufacturing plant in Jackson, Wisconsin in 1987. In 1988, Beatreme, the premier speciality food ingredient supplier in the US market was acquired by Kerry for US\$130m. In the US market Kerry further consolidated its position in 1991 through the acquisition of Dairyland Products Inc. based in Minnesota. In November 1994 Kerry announced a major

The company launched an initial public offering (IPO) in March 2017 on the New York Stock Exchange, raising just over \$300 million. Ardagh currently operates its glass and metals packaging businesses across 17 US states, with the highest concentrations of operations clustered in Illinois, California and Indiana.

Minnesota, Rhode Island, Utah, Washington and Ohio. This year Mr Coveney pledged to spend half his time in the US business, in order to "take a direct role in the strategic, organisational and commercial leadership of Greencore US", with COO Chuck Metzger, assuming day-to-day responsibility of the US business and reporting directly to Mr Coveney.

expansion of its international food ingredients business through the US\$402m acquisition of DCA Food Industries and Margetts Foods.

The Group has invested considerable resources in the development of leading positions in both North American and South American markets, with numerous acquisitions almost every year since 2000. Today, Kerry's US Taste & Nutrition business, headquartered in Beloit, Wisconsin, operates 40 manufacturing sites throughout the US, employing approximately 5,000 people. In 2017, revenues across the Americas amounted to 42% of the group's €6.4 billion sales. Their latest results, reported in May 2018, saw 2.9% volume growth across the Americas region, with Meat, Snacks, and Beverage all performing strongly.

02

ARDAGH

7,000

EMPLOYEES
IN THE US

03

GREENCORE

6,000

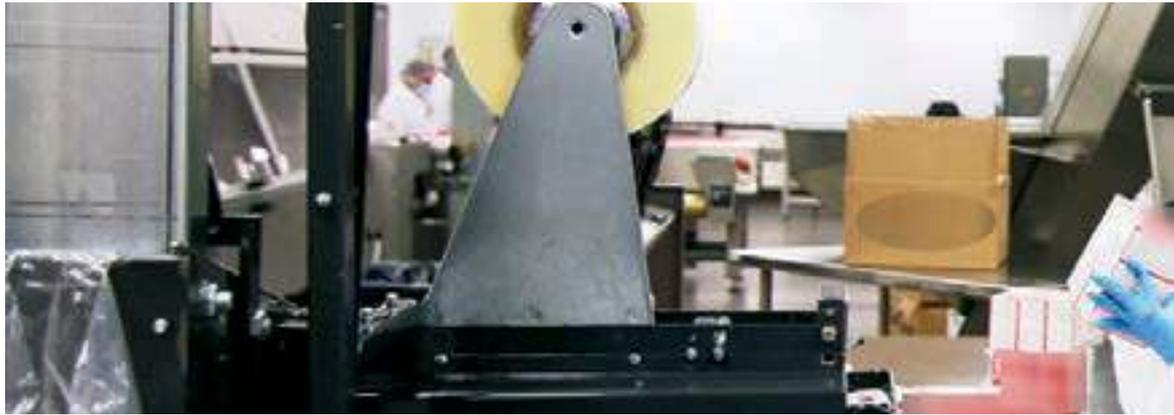
EMPLOYEES
IN THE US

04

KERRY GROUP

5,000

EMPLOYEES
IN THE US



05

ICON
4,600
 EMPLOYEES
 IN THE US

Since its foundation in Dublin in 1990, Icon has grown to become a global leader in clinical research and provider of outsourced development services to the pharmaceutical, biotechnology and medical device industries. From a small team of 5 people in 1990, ICON has grown to employ over 13,380 people

across 97 locations in 38 countries, through a mixture of organic growth and strategic acquisitions. ICON opened its first US office in Philadelphia in 1992, and began trading on the Nasdaq exchange in 1998. Icon now employs 4,600 in the US.

06

GLANBIA
3,600
 EMPLOYEES
 IN THE US

One of the world’s top nutrition companies, Glanbia plc was formed in 1997 out of the merger of Avonmore Foods plc and Waterford Foods plc, and today employs over 6,600 people across 32 countries. Glanbia entered into the US with the acquisition of a number of small cheese plants in the 1980s and 1990s, which form the basis of its market leading business there.

The United States now boasts the most Glanbia facilities of any country, with 12 manufacturing operations and corporate

offices across 7 states (Idaho, New Mexico, Illinois, South Dakota, Florida, Missouri and California). Glanbia products are sold or distributed in over 130 countries and brought in revenue of €2.4 billion in 2017. Recent investments in the US include the acquisition of California based companies thinkThin in 2015 and Amazing Grass in 2017. Glanbia also announced in 2017 its intention to establish a Joint Venture partnership to build, supply and operate a new large-scale cheese and whey production facility in Michigan.

07

KINGSPAN
1,800
 EMPLOYEES
 IN THE US

Kingspan, the leading global manufacturer of insulation panels for the construction industry, was founded as a small family construction business over 40 years ago. With a relatively low level of penetration of insulated panels in the US market, there is huge opportunity for growth as reduction of carbon footprint has become a pressing issue and to this end, Kingspan, under CEO Gene Murtagh, have invested in organic

growth and acquisitions in the US market, bringing their employee numbers up to 1,800. The Americas represented 20% of Kingspan’s business in 2017, in a record period for the group in which revenue rose by 18.0% to €3.7bn, and trading profit grew by 10.7% to €377.5m. High profile projects in 2017 included facades on the Nike headquarters in Oregon and an Aloft Hotel in Texas.



Fashion retailer Primark launched its first US store in Boston in September 2015, and took the US market by storm with its bargain-priced fast fashion, homewares and novelty goods. There are now stores in Philadelphia, New Jersey, Massachusetts, New York and Connecticut. Their ninth US store is due to open in Kings Plaza Shopping Center in

Brooklyn, New York, with a 57,900 sq ft shop, featuring 56 fitting rooms and 42 registers, access to free Wi-Fi and four customer recharge seating areas. Primark operates over 350 stores in 11 countries – the UK, the Republic of Ireland, Spain, Portugal, Germany, the Netherlands, Belgium, Austria, France, Italy and the US.

07

PRIMARK

1,800

EMPLOYEES
IN THE US

Sir Allen McClay formed Almac in 2002. It was born out of Galen Holdings Plc, which he had founded as Galen Ltd in 1968, and floated on the stock market in 1997, becoming Northern Ireland's first £1bn company. The Almac Group bought the API Manufacturing and Chemical Development, Clinical Trial

Supply and Clinical Technologies businesses from Galen. Globally Almac, a major player in drug development, now employs close to 5,000 people, of which 1,650 are based in the US, around five locations : Durham, NC, San Francisco, CA, and Audubon, Souderton, and Lansdale, PA.

09

ALMAC

1,650

EMPLOYEES
IN THE US

A world leader in paper-based packaging with approximately \$8.5 billion in global sales, Smurfit Kappa employs over 43,000 people globally, across 35 countries, and owns multiple recycling and manufacturing operations across the southwestern United States. Jefferson Smurfit first entered the US market acquiring Time Industries in 1974.

The group became Smurfit Kappa after the 2005 merger with Kappa Packaging. Group CEO Tony Smurfit oversees global operations, with Juan G. Castaneda heading up the Americas, with 1,287 employees across 17 facilities representing 2,013,025 sq ft of manufacturing space in North America.

10

**SMURFIT
KAPPA
GROUP**

1,287

EMPLOYEES
IN THE US

SECTORAL INSIGHTS

The top sectors, by number of FDI projects, in which Irish firms have invested into the US according to SelectUSA's most recent figures are:

Business Services

"The business services industry's outlook is a function of the health of the broader economy, which is currently quite favorable. A rise in GDP, an improving employment scenario, inflation approaching 2%, easing of the US dollar and momentum in oil prices are all signs of improvement in the US economy, which in turn is positive for the business services industry. The Trump administration's business-friendly policies, including tax cuts and the repeal of regulations, are additional tailwinds."

NASDAQ Business Services Industry Outlook - May 2018

Food

As Lidl and Aldi prepare to enter the US market, grocery margins will be razor sharp and discounts deep. Internet grocery shopping also continues to gain in popularity.

Software and IT

"The information technology (IT) sector is poised for another strong year, 5.0 percent growth projected. The Computing Technology Industry Association's (CompTIA) IT Industry Business Confidence Index notched one of its highest ratings ever heading into the first quarter of 2018. Executives cite robust customer demand and the uptake of emerging product and service categories as key contributors to the positive sentiment. Revenue growth should follow suit. CompTIA's consensus forecast projects growth of 5.0 percent across the global tech sector in 2018; and, if everything falls into place, the upside of the forecast could push growth into the 7 percent-plus range. According to IDC, global information technology spending will top \$4.8 trillion in 2018, with the US accounting for approximately \$1.5 trillion of the market."

Industry Outlook 2018, CompTIA



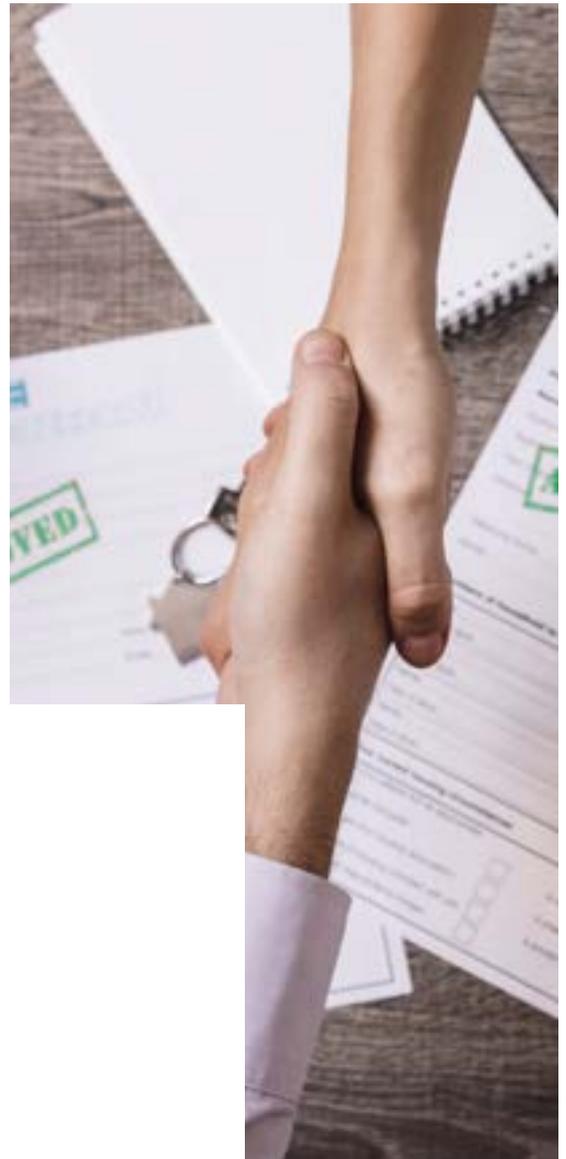
Communications

A new era in mobile begins with the rollout of 5G, which will be the foundation for new developments in internet of things (IoT), autonomous vehicles and mobile media.

Financial Services

"Financial markets in the United States are the largest and most liquid in the world. In 2016, Finance and Insurance represented 7.3 percent (or \$1.4 trillion) of US gross domestic product. Leadership in this large, high-growth sector translates into substantial economic activity and direct and indirect job creation in the United States."

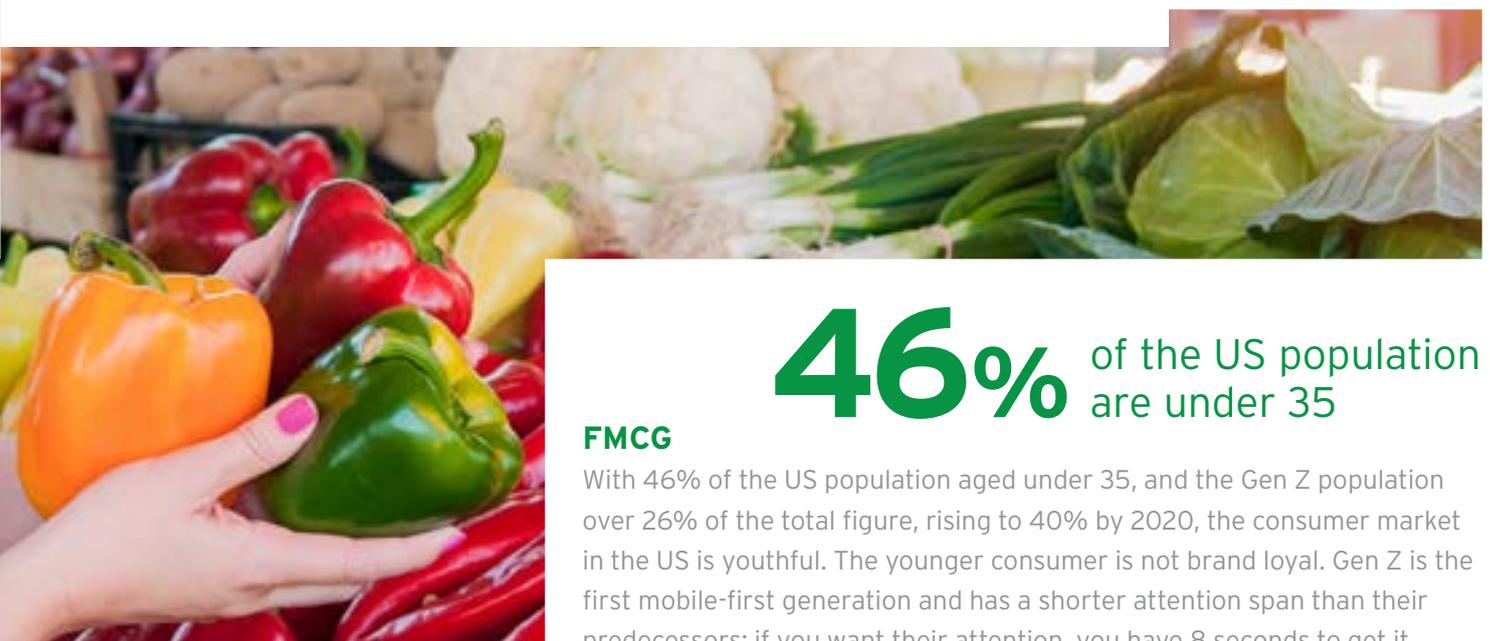
SelectUSA



Pharmaceuticals

"Pharmaceuticals had the largest stock of FDI among the manufacturing sectors, accounting for nearly 32.5 percent of manufacturing FDI stock in 2016. FDI in this industry has increased considerably over the latest available five-year period, from \$89 billion in 2010 to \$498 billion in 2016, an average increase of 33 percent a year."

Office of the Chief Economist, US Dept of Commerce.



46% of the US population are under 35

FMCG

With 46% of the US population aged under 35, and the Gen Z population over 26% of the total figure, rising to 40% by 2020, the consumer market in the US is youthful. The younger consumer is not brand loyal. Gen Z is the first mobile-first generation and has a shorter attention span than their predecessors; if you want their attention, you have 8 seconds to get it.



IRELAND INC IRISH COMPANIES IN THE US

3D4MEDICAL

3D4Medical developed a suite of medical apps designed to give students and clinical institutions access to detailed anatomical models, with their flagship product, Complete Anatomy, which was used onstage to premiere Apple's iPad Pro in 2015. Founder John Moore sold a minority stake in 3D4Medical to Malin plc. for \$16.4Million in 2015. The company is thought to be valued at between \$70m and \$100m, based on a number of takeover approaches over the past two years.

AB PACKAGING

The paper bag and flexible packaging producer founded by CEO Dermot Brady 30 years ago makes paper shopping bags and tissue for commercial retailers such as Primark, T.J. Maxx, Nike, Vodafone, and Tommy Hilfiger. As one of AB Group's largest customers, Primark's entry into the US market led the way, and made it imperative to follow. AB opened its first US plant in Newark in 2016.

ACTAVO

Worldwide Actavo has 6,000 employees in 100 locations, with their move into the Caribbean, laying fibre for Digicel, bringing the company closer to the US, and the US into their line of vision. Actavo USA has since worked with 6 million homes and businesses with over 60,000 miles of fibre optic cable installed coast to coast.

ADAPT PHARMA

Adapt Pharma is a privately-held company founded by serial bio-tech investor Seamus Mulligan. Adapt Pharma markets the drug the nasal spray Narcan® which is used for the

emergency treatment of known or suspected opioid overdose. Adapt Pharma's company headquarters is in Dublin, Ireland with U.S. headquarters in Radnor, Pennsylvania.

AEROGEN

Aerogen's global headquarters are in Galway, with offices in the US, Germany, China and the UAE. The company has 30 people working permanently overseas, The US accounts for about half its business and in 2016 added a Chicago office.

ALLERGY STANDARDS

Founded by Dr John McKeon, Allergy Standards is an independent global certification company which uses the expertise of their team to develop independent standards for testing a wide range of products to determine their relative suitability for asthmatics and individuals with allergies. Allergy Standards Ltd was established in 2000 and has offices in Dublin, New York and Seoul, Korea.

ALMAC

Sir Allen McClay formed Almac in 2002. It was born out of Galen Holdings Plc, which he had founded as Galen Ltd in 1968, and floated on the stock market in 1997, becoming Northern Ireland's first £1bn company. The Almac Group bought the API Manufacturing and Chemical Development, Clinical Trial Supply and Clinical Technologies businesses from Galen. Globally Almac, a major player in drug development, now employs close to 5,000 people, of which 1,650 are based in the US, around five locations : Durham, NC, San Francisco, CA, and Audubon, Souderton, and Lansdale, PA.



AMCS

Limerick-based AMCS was founded by CEO Jimmy Martin. AMCS is the leading supplier of integrated software and vehicle technology for the waste, recycling and material resources industries. AMCS is headquartered in Ireland with offices in the UK, Denmark, the Netherlands and Pennsylvania in the US.

APPLEGREEN

Petrogas Group US INC T/A Applegreen is a 100% owned subsidiary of Applegreen plc, a publicly quoted company listed on the Irish and UK stock markets. It currently operates four sites in the US, with retail concession stores at its US service stations on Long Island featuring a selection of food and beverage items, automotive accessories and supplies.

ARDAGH

Ardagh is a global leader in glass and metal packaging, with 39 sites across the US employing over 7,000, out of a global staff of over 23,500 in 22 countries. Founded in 1932 as the Irish Glass Bottle Company in Dublin, the company expanded through a series of acquisitions after Paul Coulson, the current Chairman and CEO, acquired an initial stake in the company in 1998.

ARDMORE SHIPPING

Founded in 2010, by Anthony Gurnee, Ardmore Shipping owns and operates product and chemical tankers worldwide. It has its ship management and administration activities located in Cork, and offices worldwide in Bermuda, Singapore, Hong Kong and Houston, Texas. Ardmore Shipping IPO-ed on the New York Stock Exchange in 2013 raising \$140m at \$14 per share.

ARRALIS

Co-founded by Limerick man CEO Barry Lunn and CTO Mike Gleaves, Arralis develops satellite communications and radar technology and works with high profile clients including the European Space Agency. Founded in 2013, Arralis is headquartered at the University of Limerick campus with a design centre in Belfast. In 2016 they opened new offices in China and the USA, and in 2017 they raised €50 million funding from a group of anonymous Asian private equity partners. Arralis also operates design facilities in Manchester and Hong Kong, a sales office in Beijing and a factory in Wuhu city in China, and employs more than 50 people around the world.

ASAVIE

IoT firm Asavie Technologies' flagship platform is the award-winning PassBridge® which powers on-demand services for the secure and intelligent distribution of data to connected devices for clients such as AT&T, Eir, Three, Telefonica and Vodafone. Founded by Ralph Shaw in 2004, the company is headquartered in Dublin with offices in the UK, North America, Spain and Malaysia.

ATA GROUP

The Cavan-based precision engineering toolmaker operates in 60 markets, with a network of over 1,400 distributors and manufacturing centres in Ireland, the UK and the US. The business has been built up over 50 years, serving aerospace, automotive, oil and gas markets, shipbuilding and metal fabrication. Former Smurfit executive Peter Cosgrove led an acquisition of the company in 2008, seeing its potential for growth. The acquisition of its biggest competitor SGS Tool (Cleveland, Ohio) in December 2012 put the company into a world leadership position and it now employs over 200 people worldwide.

AXONISTA

Founded in 2010 by Clare McHugh and Daragh Ward, Axonista builds software to bring interactivity to TV and video. Based in Dublin and NYC, Axonista's clients include Apple TV, TV3, QVC, MTV and ESPN.

BANK OF IRELAND

Bank of Ireland Group operations in the USA incorporate Global Markets operations in Connecticut and Corporate Banking offices in Connecticut, New York and Chicago. Bank of Ireland Corporate Banking and Treasury has offices in Chicago and New York City and a branch in Stamford, Connecticut. Bank of Ireland's US Leveraged Acquisition Finance group was formed in 2002. Bank of Ireland obtained a US Banking License in July 2006 and commenced operations as a US branch in Stamford later that year. In addition, Bank of Ireland established representative offices in New York City and Chicago in 2008.

BHSL HYDRO

The Limerick agri-tech company's US operation is headed up by Ken Le Faive, President, North America. The company, which pioneered a method for using poultry manure as an energy source, entered the US market after agreeing a €3 million pilot project with the state of Maryland. Maryland is providing \$1 million in funding for the project. BHSL, which is providing the remaining €2 million in funding for the new project, was established by brothers Jack and Declan O'Connor in 2009. It employs 28 people at its headquarters in Ballagh.

BIG RED BARN

Mayo company Big Red Barn began life providing a sturdier alternative to marquees for events, before moving into modular homes solutions. In 2018 Big Red Barn entered into a public private partnership with the City of Warwick Housing Authority which will fund a pilot building on a site in Warwick, Rhode Island, supplying a modular home for a low income family, to demonstrate the ability to provide cost-effective housing for the city.

BIMEDA

A global leader in animal health, Bimeda has established markets in more than 70 countries worldwide and has R&D, manufacturing and distribution capabilities across Europe, North America, South America, Africa, Asia and Australia. Bimeda employs almost 800 employees worldwide with US headquarters are based in Oakbrook Terrace, IL. The Bimeda US product portfolio focuses on five key categories: ecto- and endo-parasiticides, water soluble antimicrobial, injectables and nutritional products.

BIO-MEDICAL RESEARCH

Bio-Medical Research have been creating ground-breaking EMS (Electrical Muscle Stimulation) technology for over 50 years. Galway, 'The City of the Tribes' is home to Bio-Medical Research, with offices and employees located in the US, France, Hong Kong, UK and Singapore.

BLUEFACE / STAR2STAR

In January 2018, Irish Unified Communications as a Service (UCaaS) provider Blueface merged with Star2Star forming a new company - StarBlue INC - in order to form one of the world's top five Service UCaaS businesses. Sarasota, Florida based, Star2Star is a globally recognized market-leader in the North America Unified Communications Market. The combined company now employs well over 500 people across the globe.

COGS & MARVEL

The Irish brand experience and creative events agency opened a US office in Silicon Valley after winning business with Dublin-based multinational tech firms. Formerly known as The Green Light Events, the business founded by Róisín Callaghan and Jane Gallagher in 2006, underwent a major rebrand to become Cogs & Marvel in 2017. It also operates an in-house travel company to manage travel and accommodation requirements for customers, who include Google, Facebook, LinkedIn, Twitter, Dropbox, Mastercard, Fáilte Ireland, Slack and Uber. The new US office is headed up by co-founder Róisín Callaghan, who relocated permanently to the US, with a staff of 15 in the San Francisco office.

COMPLIANCE & RISKS

The end-to-end global regulatory solutions provider, headquartered in Cork, counts 8 out of 10 of the top electronics manufacturing companies and 3 of the top 4 engineering companies in the world as clients. It has offices in Brussels, California, London and New York, and over 70 employees across the globe.

CORA SYSTEMS

Cora Systems, headquartered in Carrick-on-Shannon, is a worldwide leader in providing enterprise project and portfolio management solutions to global organisations and government agencies, including the NHS in the UK, the HSE in Ireland, Boston Scientific and Allergan. Founder and CEO Philip Martin started the company in 1999, and now employs around 60 staff in Ireland, and further staff in offices in the United States and the UK.

CORLYTICS

Founded in 2013 by John Byrne, Corlytics is a world-leading provider of regulatory risk intelligence to enable organisations and financial institutions to take a data-driven approach to regulatory resource allocation. Corlytics automatically collates, categorises, interrogates and analyses regulatory notices from regulators across the globe, and launched its Regulatory Event Data (RED) app in November 2018.

CORVIL

Corvil, a Dublin-based network data analytics company, won the “best financial transaction security platform” prize in the FinTech Breakthrough Awards 2017. With its headquarters in Dublin, the company also has offices in New York, Tokyo, London, Hong Kong, Krakow, and Toronto. Founded by the late Prof John Lewis and three Trinity College Dublin post-graduate students in 2000, its products are used by banks, exchanges, market makers and service providers including Morgan Stanley, Nomura, Commerzbank, Thomson Reuters, the Nasdaq, the London, Moscow and New York Stock exchanges, and Deutsche Börse.

CPL

Cpl is a global Irish company founded by Anne Heraty, CEO. It is a recognised leader in temporary and permanent recruitment and has a US office in Boston, Massachusetts. In the US, Cpl caters to Irish corporates based in the US and local US companies. Cpl work closely with US companies setting up European operations and actively supports the IDA in their marketing activities. Stephen Mullin, Group Sales Director, is in contact for Cpl's US activities and works with US and Irish companies across their global network of 41 offices in 11 countries.

CRH

Oldcastle is the North American arm of CRH plc., one of the world's leading building products and materials companies based in Dublin, Ireland. It is the largest building materials company in North America with more than 1,700 operations in 50 US states and 6 Canadian provinces. CRH's Americas Material business has operations in 43 states, whilst its Americas Products business is in 38 states across the US. In 2017, its US businesses generated €14.64 billion in revenues, or 52% of group revenues.

CUBIC TELECOM

Cubic Telecom is recognised as a world leader technical enabler to Automotive OEMs, with over 1.3 million connected cars to date. The team has over 120 people working with global partners including VW Group, and closed agreements with more than 60 mobile operators including AT&T, China Mobile, Digicel, Orange, Verizon, Sprint, PCCW and Vodafone. The 12-year-old Irish start-up has raised over \$83.5 million to date.

DAIRYMASTER

DairyMaster is one of the world's leading dairy and agri-tech firms, and has attained international acclaim for manufacturing superior, hi-tech dairy equipment. It exports to 40 countries and has direct operations in Ireland, UK and USA.

DCC

International sales, marketing and support services group DCC employs circa 550 people in the US. DCC made its first move into the US market with the acquisition of US-based Retail West for \$200m (€173m) in 2017. It acquired Elite One Source Nutritional Services (a provider of contract manufacturing and related services to the growing healthcare and dietary supplements market) this year for \$50 million.

DECAWAVE

DecaWave, the developer of the world's first single chip UWB transceiver for Real Time Location Systems (RTLS) and Internet of Things (IoT) applications, announced the opening of its first US office in Austin Texas in 2014, after significant interest in the launch of its first chip in 2013. DecaWave is privately owned and employs over 55 engineers in its Dublin headquarters. Founder Ciaran Connell moved to California in 2015 and leads a staff of five from a Silicon Valley office that he sees as crucial to the company's future.

DEPOSITIFY

Dublin-based fintech start-up Depositify provides escrow services to landlords, tenants and letting agents, in partnership with Bank of Ireland and People's United Bank in the US. The company, which was founded by Jon Bayle and Dave Brennan, has offices in Dublin and Boston. Depositify raised \$1.4m in 2016 and is backed by Delta Partners, Enterprise Ireland, Escher Group and private investors.

DESIGNER GROUP

Blanchardstown-based Designer Group has 30 people involved in Engineering, Procurement and Construction in the US, currently building 160MW of Biomass plants and working for large industrial customers like Arcelor Mittal. Expected turnover for 2018 is €30m (out of an expected global turnover of €200m) and US headcount is expected to grow to 50 by year end. Former MITIE Group boss Padraig Byrne moved to the States late last year, after the acquisition of Kansas and Missouri-based energy-consultancy business PPS, to run Designer Group's new US operation.

DIACEUTICS

Co Louth-based medtech firm Diaceutics is aiming to hit revenues of \$40 million by 2020 and recently raised €4.3 million through a mix of debt and equity financing to fund its expansion. The company works with 31 out of the top 35 pharmaceutical companies to integrate diagnostic testing into their treatment pathways. Based in the Regional Development Centre on the campus of the Institute of Technology in Dundalk, Co Louth, it has offices in 17 jurisdictions including New Jersey in the US, and currently employs 60 people globally, but expects headcount to reach up to 100 by the end of 2018.

DING

Founded by Chairman Mark Roden in 2006, Ding enables expats to send mobile phone credit top-ups to friends and family back home. The Dublin-based firm has 200 employees worldwide, with offices in New Jersey and Miami in the US, as well as Dubai, Dhaka, Paris and Bucharest. They work with over 400 mobile phone operators in over 130 countries and made revenues of over \$500 million last year.

DIONA

Co-founded by John Polakowski, Anil Singaraju and Graham Stubbs in 2012, Diona focuses on the global Health & Human Services market, aiming to help governments help people by turning smartphones and tablets into tools that improve people's lives. Diona has offices in Ireland, India, Canada, the UK and Austin, Texas in the US.

DPS ENGINEERING

With offices in Boston, Phoenix, Cary and Albany (the heart of New York's Tech Valley) DPS Engineering offer specialised architectural, engineering, and construction services to the advanced technology, process chemical,

industrial and life sciences sectors. They work with semiconductor, solar, nanotechnology, pharmaceutical, biopharmaceutical and process industry clients throughout the US.

E+I ENGINEERING

E+I Engineering is the largest electrical switchgear manufacturer in the UK & Ireland, currently employing 1,700 staff globally, with just under half in the North West of Ireland, with additional manufacturing locations in South Carolina and the United Arab Emirates. The factory in the Middle East opened around 2008 and enables the company to service countries as far away as Singapore and Australia. In 2014 E+I opened the facility in the United States, which was then expanded in 2015.

EMPOWER THE USER

Empower The User is a provider of Software as a Service RolePlay Simulation technology for the training and assessment industries, which started in 2002 at Trinity College Dublin as a joint research partnership with Intel. Co-founders Dr. Declan Dagger and Professor Vincent Wade began researching and developing the first Adaptive eLearning systems in the world; shifting from one-size fits all didactic teaching to adapt the pace, content and style of teaching to the preferences of the individual learner.

ENTEKRA

Taking part in the Irish delegation, led by US Embassy Charge d'Affaire Reece Smyth, to the 2018 SelectUSA Summit, was hugely successful for Irish homebuilder Entekra, as they signed a deal with a \$4.75 million tax credit from the State of California to build a fully-integrated off-site solution (FIOSS™) factory in Modesto, CA. The fully automated, high-speed facility will be operational by May 2019, employ 250 people and deliver 3,000 homes a year. Enter also announced the opening of a second factory in Southern California in 2020, which will employ a further 250 staff.

ESCHER GROUP

Escher Group was founded in 1989 in Boston, was acquired through an MBO in 2007 and moved its headquarters to Ireland. Escher Group is the world's leading supplier of digital point of service software with offices in five countries and employing 145 personnel across the globe, growing the Irish employee base from 20 to 64 since 2007. In 2012 Escher secured its biggest ever contract by winning the United States Postal Service tender with a value in excess of \$50m. Their software is used

by over 300,000 postal workers every day to deliver service to millions of consumers.

EXCELSYS TECHNOLOGIES

Excelsys serves original equipment manufacturers globally from its base in Cork, where it employs about 30 staff. These include GE Healthcare and Siemens Medical. It also has a sales office in the United States, and has outsourced its electronics assembly to China. Its has sales in 40 countries and annual revenue of \$15 million. A 2015 management buyout was led by chief executive Gary Duffy, who already owned about 20 per cent of the business. The company, which has been through a number of iterations since the early 1990s, was enjoying growth of 15 per cent a year at the time.

FENERGO

Dublin-based fintech Fenergo offer software solutions for financial institutions, streamlining the end-to-end Client Lifecycle Management processes (from regulatory onboarding, data integration, client and counterparty data management, client lifecycle reviews and remediation all the way to client offboarding etc.). In 2018 it doubled its Dublin-based workforce to 400, and opened offices in Madrid and Hong Kong. It also has offices in London, Toronto and Sydney. Backed by Insight Venture Partners in New York, it is looking towards an IPO on a New York exchange in the medium-term.

FEXCO

Founded in 1981 by Brian McCarthy, the international payments and FX company headquartered in Killorglin, Co Kerry, has over 2,800 employees worldwide, across 30 markets in Europe, the Middle East, North America, Latin America and Australasia.

FINEOS

Fineos is a global market leader in software development in core insurance technology for Disability, Life, Accident and Health. Eight of the Top 20 Group Life and Health Insurers in the US work with Fineos Claims. Its US offices are based in Atlanta and Boston.

FIRMWAVE

Firmwave is an engineering and design company that develops smart connected IoT devices, is pioneer of sensor to cloud technologies that enable remote equipment monitoring at scale in vertical markets such as Energy, Industrial, Construction and Healthcare. The Dublin-based company has partnered on industrial IoT projects with Intel, HealthBeacon, Vodafone and Glen Dimplex.

FIRST DERIVATIVES

The Newry-based firm is a global technology provider of high-performance software to a variety of industries as well as regulatory and IT consulting services to the capital markets industry. It employs about 600 people in the USA with offices in New York, New Jersey and Philadelphia.

FLEETMATICS

Fleetmatics provides fleet management solutions for small and medium-sized businesses delivered as Software-as-a-Service (SaaS). With its global HQ in Dublin, its US head office is in Waltham, Massachusetts. There are additional US offices in Alpharetta, Georgia; Charlotte, North Carolina; Arlington Heights, Illinois; and Clearwater, Florida. Fleetmatics USA, LLC operates as a subsidiary of FleetMatics Limited.

GECKO GOVERNANCE

Shane Brett set up Gecko Governance in Dundalk bootstrapping the business and now has offices in New York, Sydney and Dundalk - where it has six employees. The company has developed software tools to help banks and funds keep track of their obligations and compliance deadlines.

GENESIS AUTOMATION

Formed in 2010, Genesis Automation is a Cork-based healthcare software company which was created by Noel O'Hanlon, to manage inventory in hospitals, capture procedure information and analyse the cost of procedures. It entered the US market in 2018, signing a \$1 million deal with Texas-based Driscoll Children's Hospital. Its software is also used in 27 hospitals in the UK. Genesis has Genesis 14 staff in the US, in sales and support roles and 30 people at its Cork base.

GLANBIA

One of the world's top nutrition companies, Glanbia plc was formed in 1997 from the merger of Avonmore Foods plc and Waterford Foods plc, and today employs over 6,600 people across 32 countries. Glanbia entered into the US with the acquisition of a number of small cheese plants in the 1980s and 1990s, which form the basis of its market-leading business there. The United States now boasts the most Glanbia facilities of any country, with 12 manufacturing operations and corporate offices across 7 states (Idaho, New Mexico, Illinois, South Dakota, Florida, Missouri and California).

GLEN DIMPLEX

The Glen Dimplex Group commenced operations in North America in 1991 with the acquisition of several leading heating brands. Today, Glen Dimplex North America has grown substantially, and dominates in the electric heating, stoves, fireplace and industrial cooling markets across the continent, offering a range of highly innovative products and solutions. Dimplex Thermal Solutions is a US manufacturer of industrial and medical process chillers.

GLOBOFORCE

Globoforce is an Irish-American company, founded by Dubliner Eric Mosley, which is headquartered in Park West in Dublin, Ireland and Framingham, Massachusetts. Through its award-winning technology and HR software, Globoforce empowers organisations to create a positive culture that fosters human connections as a strategy to create a high-performing, diverse, and inclusive workplace. The company pioneered the WorkHuman movement to help make work more human for millions of people and organisations worldwide.

GREENCORE

Greencore Group plc is a leading international convenience food company. It was established by the Irish government in 1991 when they privatised Irish Sugar, and is today the world's largest sandwich manufacturer. Headed up by Patrick Coveney and listed on the London Stock Exchange, it is part of the FTSE 250 Index. Greencore's US headquarters is in Chicago, with numerous further operations in Illinois, as well as California, Virginia, Florida, Minnesota, Rhode Island, Utah, Washington and Ohio.

HANLEY ENERGY

Headquartered in Ireland, Hanley Energy have divisional offices and global operations in Germany, Sweden and Virginia, USA. Hanley Energy are specialists in the design, source, supply, install and commission of critical power, energy management and IT infrastructure solutions - from the power grid to the factory process equipment and Data Centre IT rack - coupled with comprehensive service and maintenance, consulting and training.

HAVOK

Havok is a leading provider of games development technologies, which have been used in top franchises including Assassin's Creed and Call of Duty. Their products have also been used to drive special effects in movies including Harry Potter, James Bond and the Matrix series. Havok has offices in Dublin, San Francisco, Tokyo, and Germany.

HUB CONTROLS

Award-winning Irish tech start-up Hub Controls was founded in 2014 by CEO Oliver Hynes. Its first product—the Hub Controller smart thermostat, which helps consumers reduce home energy bills—was launched in November 2016, and recent investments are being channelled into “ambitious” expansion plans over the next four years, developing a US version of the Hub Controller smart thermostat, after a 2018 win at US clean tech competition 76 West, offered the company a strong entry point into the market.

ICON

Since its foundation in Dublin in 1990, ICON has grown to become a global leader in clinical research and provider of outsourced development services to the pharmaceutical, biotechnology and medical device industries. From a small team of five people in 1990, ICON has grown to employ over 13,380 people across 97 locations in 38 countries, through a mixture of organic growth and strategic acquisitions. ICON opened its first US office in Philadelphia in 1992, and began trading on the Nasdaq exchange in 1998. ICON now employs 4,600 in the US.

INITIAFY

Founded in April 2012 by Julie Currid and Shane Fennell, Initiafy, “helps companies to manage the initial steps contractors, temp staff and seasonal workers need to take to become productive, safe members of their workforce” according to CEO and co-founder Shane. They quickly looked towards the US, opening an office in New York in November 2014 and the following quarter saw the US generate more than 50% of their revenue. Initiafy now employ eight staff there.

ITERUM THERAPEUTICS

Founded in 2015, Iterum Therapeutics Limited is a Dublin-headquartered clinical-stage pharmaceutical company dedicated to developing differentiated anti-infectives. These products are aimed at combatting the global crisis of multi-drug resistant (MDR) pathogens to significantly improve the lives of people affected by serious and life-threatening diseases around the world. Its US bases are located in Connecticut and Chicago.

KAINOS

Kainos Group plc is headquartered in Belfast and develops software solutions for businesses and organisations, particularly in public, healthcare and financial services sectors. Kainos has offices in the UK, Poland, Ireland and the US, and serves markets in the EMEA region and North America.

KEPAK

Kepak Group is the first Irish meat processing company to launch an Irish beef retail brand – Celtic Beef Company – in the USA. Kepak North America has been in operation for two years and launched the brand, Celtic Beef Company, in September 2017. A family-run business that began with a butcher's shop, Kepak has grown to an internationally operating, multi-faceted food innovator with 30,000 employees across 30 countries.

KERRY GROUP

Having commenced operation from a greenfield site in Listowel, Co. Kerry in 1972, the Kerry organisation has evolved from a private dairy processor, to a dairy co-operative, to its current incarnation as a public company with annualised sales of approximately €6.4 billion, and operations established in 27 countries across five continents. Kerry began exporting dairy ingredients to the US in 1972 and opened its first overseas food ingredients manufacturing plant in Jackson, Wisconsin in 1987. Today, Kerry's US Taste & Nutrition business, headquartered in Beloit, Wisconsin, operates 40 manufacturing sites throughout the US, employing approximately 5,000 people.

KINGSPAN

Kingspan, the leading global manufacturer of insulation panels for the construction industry, was founded as a small family construction business over 40 years ago. Kingspan, under CEO Gene Murtagh, have invested in organic growth and acquisitions in the US market, bringing their employee numbers up to 1,800. The Americas represented 20% of Kingspan's business in 2017, in a record period for the group in which revenue rose by 18.0% to €3.7bn, and trading profit grew by 10.7% to €377.5m.

LAKELAND DAIRIES

Lakeland Dairies Group is a dairy co-operative based in Killeshandra, County Cavan. It operates across fifteen counties in both Ireland and Northern Ireland, and is

Ireland's second largest dairy co-operative, processing roughly 1.2 billion litres of milk annually. Lakeland Dairies currently has dedicated operations in Ireland, the United Kingdom and the United States and exports to 77 countries worldwide.

LIFES2GOOD

Lifes2good is a leading global Nutraceutical business, based in Galway, with a portfolio of category-leading brands worldwide. Lifes2Good opened its US office in 2007, launching its flagship brand Viviscal into the US hair loss market and signing up direct distribution in the US. By 2012 Viviscal was on the shelves of 25,000 US stores including Walgreens, Rite Aid, GNC and Duane Reade. In 2017 the Viviscal brand was sold to Church & Dwight for €150 million and Lifes2Good launched the Berkeley Life supplements into 12,000 stores in the US. Lifes2good also has international offices in Chicago, London, Paris, Madrid, Lisbon, Toronto, Sao Paulo, Sydney and Mexico City.

LINCOR SOLUTIONS

Irish-founded medtech firm Lincor Solutions was established in 2003 and are the global leader in the development and delivery of point of care education, communication and entertainment technology to hospital patients. LINC Technology is used in over 130 hospitals around the world and the company has offices in the US, Canada, France, Austria and Ireland.

LINESIGHT

Linesight provides professional services and strategic support to the global construction industry, with bases in New York on the East Coast and San Francisco on the West Coast, and has worked on high profile projects including the cost management of the renovation and redevelopment of the Museum of Modern Art (MoMA) in New York.

LOCATIBLE

Locatible has created a patented cloud platform that can locate any asset or person indoors to an accuracy of sub one metre and could potentially save hospitals millions of dollars every year. Founder Ronan O'Cóigligh aims to be the market leader in the medical RTLS industry throughout Asia-Pacific and the Americas. The rapidly growing company has offices in Ireland and Boston, with clients worldwide.

LOTUSWORKS

LotusWorks are engineering and technical service experts who, for almost 30 years, have been working with some of the world's leading manufacturers. Founded in Sligo in 1989, LotusWorks entered the US market in 2000 and opened the Massachusetts office in 2001. In 2006, Lotus Group USA opened in Washington. Today, LotusWorks teams support major clients on large construction projects at their facilities in 13 states across the US, and North American operations are based out of Massachusetts and Washington. LotusWorks employ 172 people in the US and 474 in total. In the Financial Year ended 28th February 2018, LotusWorks experienced unprecedented growth within the US, with turnover for the US business for this period of \$26.5M representing growth of 168% on the previous financial year. LotusWorks is projecting further growth levels in excess of 20% in the US market for the financial year ending 28th February 2019.

LUZERN

Founded by Ken Doyle in 2004, Luzern creates, builds and manages e-commerce solutions for brands. Clients include Philips, Unilever, Glen Dimplex, Jawbone, PetSafe and Turtle Beach, and Luzern has offices in Ireland, the UK and Germany as well as the US. CEO Ken Doyle told Bloomberg in 2017 that he plans to invest around \$6 million over the next three years to find U.S. customers to replace those he expects to lose in the U.K. post-Brexit.

MAAS AVIATION

Darragh Hall, the company's managing director, established Maas as Expressair Aviation with one hangar in Shannon 35 years ago. It provides aircraft painting services to OEM, MRO, airlines, aircraft operators, leasing companies, corporate and government agencies located throughout the world. Its most recently-established base is in Mobile, Alabama and paints new Airbus craft as they come off the nearby assembly line. It now ranks as one of the world's top companies in its field and employs more than 150 people between Europe and the US.

MAGNET NETWORKS

The official Global Connectivity Partner of the Ireland INC Index.

Magnet Networks, a telecommunications, data connectivity and security services provider, is headquartered in Ireland and has over 100 staff throughout Europe, the US and beyond. Owning and running its own network, Magnet Networks has invested over €120 million in creating the most advanced telecoms network to date. Previously working in senior finance position in the US and Europe with firms such as Network Appliance,

Sun Microsystems and Yahoo Europe, CEO Mark Kellett has led Magnet Networks since 2007 alongside a leadership team including Chairman Ken Peterson and CFO Conor O'Reilly.

MARCO BEVERAGE SYSTEMS

Founded in 1980 and headquartered in Dublin, Marco Beverage Systems Ltd designs and manufactures leading hot water delivery systems for the global food service market. Entering the US market in 2010, Marco Beverage Systems were exclusively distributed by La Marzocca USA. In 2015 they established their own US presence, with sales and customer support. Marco Beverage Systems also have global presences in the UK, the Netherlands and China.

MEGAZYME

Megazyme was founded in 1988 by Barry V. McCleary, PhD, DScAgr with the specific aim of developing and supplying innovative test kits and reagents for the cereals, food, feed and fermentation industries. Megazyme is a recognised world leader in the development of high quality, innovative test technology; eight of its tests are USA recommended and/or Official Methods and many of its methods are industry standards worldwide. Megazyme has its research and manufacturing facilities in Bray, Ireland and has sales and distribution agreements in over 30 countries, with its US offices in Chicago as well as US distributors.

MERGON

Mergon has operations in Ireland, the Czech Republic and USA. Established in 1981, Mergon works with leaders in the Automotive, Industrial and Healthcare sectors, working with customers on the design, manufacture and assembly of everything from Tesla car parts to hospital bed panels. Mergon's US operations have been running since 1998, with the establishment of Mergon Corporation in Anderson, South Carolina, USA.

MINGOCOIN

Headquartered in Ireland with offices in the US, MingoCoin is Ireland's first official cryptocurrency, based on an app which collates messages from a host of popular apps in one place. Attracting using of the app to compete in gaming will then encourage the exchange of MingoCoin. MingoCoin launched their Initial Coin Offering (ICO) at Dublin Tech Summit in April 2018.

NETWATCH

Carlow-founded Irish security monitoring company Netwatch merged with companies in Britain and the US to form the Netwatch Group in April 2018. The newly-formed Netwatch Group comprises Netwatch - who already operated US offices in Netwatch offices in Boston, Chicago and New Jersey - and the California-based National Monitoring Centre, CalAtlantic in Texas and Onwatch Multifire, which is based in Sussex. The current workforce of 220 is due to double after the expansion, and the merger brings with it the addition of 1,000 resellers in the USA.

NORBROOK

Norbrook, one of the largest privately owned veterinary pharmaceutical companies in the world was established in 1969 by Lord Ballyedmond. The company's position in the global animal health market is strengthened through new product development, substantial investment and increasing revenue in their main markets.

NOVA LEAH

Founded by CEO Anita Finnegan, the Dundalk-based start-up develops cybersecurity risk management systems for medical devices. In 2017 they announced the creation of 78 new jobs, with 50, including engineering support, based in Dundalk and the remaining 28, including sales and marketing roles in their Boston office.

NUTRITICS

Award-winning nutrition analysis software, Nutritics is designed to enable better decision making in healthcare, food services, elite sport and education. Founded in 2011 by two brothers Damian and Ciarán O'Kelly, Nutritics has quickly grown its market across more than 165 countries, doubling in size every year.

OPENET

Founded in 1999 by Joe Hogan, Openet, a global leader in the supply of digital BSS (business support systems) and customer engagement solutions, is Ireland's largest privately-owned software company. It employs 1,000 people worldwide, with 300 at its Dublin-based headquarters, and the rest in 22 other global locations, including the UK, Germany, France, Italy, Australia and the US. Openet's US headquarters are in Reston, Virginia, just outside Washington DC, with sales offices in San Francisco, Dallas and Orlando.

OPENMIND NETWORKS

Founded by 2003 by Alex Duncan, Brian Kelly and Billy Shekleton, Openmind Networks operates a mobile platform that offers messaging solutions to various market segments within the telecoms industry. Openmind's Communication Platform is deployed in over 120 sites across 30 countries in Europe, Middle East, Asia and North America, powering over 1 Billion transactions every day. Openmind is headquartered in Dublin with regional offices in the Czech Republic, Germany, UAE, the Netherlands and Mountainview in the USA.

ORRECO

With offices in LA, London and Galway, Irish company Orreco uniquely blends Data Science and Sports Science to generate customised indicators of injury, optimal training load and recovery strategies for elite athletes. Orreco works with top athletes worldwide including Olympians, PGA golfers, US pro franchises across the leagues as well as F1 drivers and UK Premier League teams.

PADDY POWER BETFAIR

Paddy Power Betfair group already controls nearly 40% of the regulated online betting market in the US, via its TVG website and owns an online casino business in New Jersey. In May 2017 it bought New York-based specialist betting firm Draft for an initial \$19m (€17m) but a potential \$44m in full, depending on how the business performs over the next four years. Draft is part of the rapidly growing 'fantasy sports' market, where punters can bet online on virtual sports results.

PAYTIENT PAYMENTS

Fintech startup Paytient Payments creates customised Patient Payment Plans for the healthcare industry. The Irish company was the winner of Best Pitch on the NDRC (National Digital Research Centre) PreAccelerator Fintech Programme in November 2017. Formed and based out of the Hatch Lab in Gorey, Co Wexford, it opened its first US office in Manhattan in late 2018.

PCH

Founded in Cork by entrepreneur Liam Casey, PCH focuses on the design and production of consumer electronic devices and appliances. Headquartered in Cork, with operational headquarters in Shenzhen, China and U.S. headquarters in San Francisco, California, PCH has additional offices in Cape Town, South Africa; Hong Kong; New York; Pune, and India. PCH acquired Lime Lab, a Silicon Valley-based product development consultancy, in 2012, to focus on R&D and prototyping.

PLANNET21

Denise Tormey founded PlanNet21 Communications 20 years ago, and now employs 75 staff who are largely based in Ireland, with offices in Dublin, Cork, Galway and Belfast as well as California. As President of the North America branch, she spearheads the company which helps Global US companies establish or expand their operations in Europe and Asia, by offering agile and intelligent technology solutions to businesses expanding into EMEA and emerging markets.

PM GROUP

PM Group is an international project delivery company operating in Europe, the USA and Asia. Founded by two Irish engineers in 1973, its US presence was established in 2010 with the acquisition of the San Jose, California-based Greene Engineers. In 2017 PM Group opened a new, expanded Boston office to cater to continuing growth in US operations. It also has offices in the UK, Poland and Singapore.

POPPULO

Cork-based company Poppulo is the global leader in employee communications technology. Founded in Bandon in 1996, it currently employs 163 people at its Cork city headquarters and 37 in Boston. In January 2019, the communications software company announced a €30 million funding round from US-based investors Susquehanna Growth Equity, which will fund R&D and expansion across Europe, the Middle East, Asia and North America.

PRIMARK

Fashion retailer Primark launched its first US store in Boston in September 2015, and took the US market by storm with its bargain-priced fast fashion, homewares and novelty goods. There are now stores in Philadelphia, New Jersey, Massachusetts, New York and Connecticut. Their ninth US store is due to open in Kings Plaza Shopping Center in Brooklyn, New York, with a 57,900 sq ft shop, featuring 56 fitting rooms and 42 registers, access to free Wi-Fi and four customer recharge seating areas. Primark operates over 350 stores in 11 countries – the UK, the Republic of Ireland, Spain, Portugal, Germany, the Netherlands, Belgium, Austria, France, Italy and the US.

PROFITERO

Profitero is an eCommerce performance analytics platform for retailers and brands that tracks more than 450 million products across 5,000 online stores in more than 50 markets. Customers include brands like General Mills, L'Oreal, Adidas, Heineken, and Panasonic. With headquarters in Dún Laoghaire, the company has offices in San Diego, CA and Boston, MA.

QUATERNION

Quaternion is a capital markets consulting practice that advises on and implements quantitative risk management projects. As well as its Dublin headquarters, it has offices in New York, London and Düsseldorf. The company announced in November 2018 that it would hire 20 people at its Irish headquarters over the next two years after forming a strategic partnership with State Street subsidiary AcadiaSoft.

RELATECARE

RelateCare began as a joint venture between the Cleveland Clinic and Rigneydolphin to provide patient access, telehealth, contact centre and outsourcing solutions to healthcare organisations around the world. After successfully improving patient access and outcomes at three of the top ten health systems in the US, RelateCare expanded its North American footprint with the opening of its first Patient Coordination Center in the US, in Cleveland in 2017.

SHADOWMAN SPORTS

Shadowman Sports grew out of a final year thesis of CEO JP Hartigan, when studying Product Design & Technology in University of Limerick, the home of Munster Rugby in Ireland. He developed equipment for collision sports players to practice tackling and reduce injuries on the field. Growing the business internationally, Shadowman is now geared towards American Football and has bases in San Francisco and Connecticut as well as Ireland.

SHORLA PHARMA

Shorla Pharma is a female-led healthcare company that develops innovative, high barrier to entry pharmaceutical therapies with a particular interest in women's and paediatric health. Shorla Pharma were part of the 2018 Irish delegation to the SelectUSA investment summit held in Washington DC.

SILVERCLOUD HEALTH

SilverCloud Health provides an innovative digital platform for evidence-based online mental health and behavioural healthcare routines. SilverCloud Health was created out of the Technology Enhanced Therapy project, a joint translational research project undertaken by the NDRC (National

Digital Research Center) and Trinity College Dublin's Computer department and Parents Plus, Mater University Hospital Dublin. The company has offices in Dublin and Boston.

SMURFIT KAPPA GROUP

A world leader in paper-based packaging with approximately \$8.5 billion in global sales, Smurfit Kappa employs over 43,000 people globally, across 35 countries, and owns multiple recycling and manufacturing operations across the southwestern United States. Jefferson Smurfit first entered the US market acquiring Time Industries in 1974. The group became Smurfit Kappa after the 2005 merger with Kappa Packaging. Group CEO Tony Smurfit oversees global operations, with Juan G. Castaneda heading up the Americas, with 1,287 employees across 17 facilities representing 2,013,025 sq ft of manufacturing space in North America.

SURETANK

Suretank is a Co Louth-based manufacturer of offshore tanks, offshore containers, cargo carrying units and cryogenic tanks for the oil and gas and sector. The business was founded in Dundalk in 1995 supplying these products to the North Sea and revenue in year 1 was €1 million with 14 employees. By 2013, Suretank was employing over 600 people, with revenue of €68 million, translating as an average 20% + per annum growth over 18 years. Suretank manufactures in 7 countries (Ireland, UK, Poland, Thailand, China, Brazil and USA), has sales offices in Mexico, USA, Ireland, UK, Netherlands, Nigeria, Australia, Thailand and China.

SWRVE

Swrve was established by Havok co-founders Hugh Reynolds and Steve Collins in 2010. Swrve's technology platform enables brands to deliver contextually rich and relevant in-app mobile interactions for real-time marketing engagement, and it boasts customers including Virgin, Microsoft, Warner Brothers, Emirates and Telefónica. Swrve has offices in Dublin, London and San Francisco.

SYSNET

A leading provider of cyber security and compliance solutions to the payments industry, Sysnet last year announced a \$2 million investment and the creation of 500 new jobs for a new contact center in DeKalb County, Atlanta. The Irish cybersecurity company has 3 million customers in 29 countries around the world.

TAXAMO

Kerry company Taxamo, which offers an international VAT payment service for ecommerce companies that sell digital products, was founded by John McCarthy, son of Fexco founder Brian McCarthy. Basing their business on assuming the VAT liability for global companies selling digital products made a Silicon Valley presence imperative.

TEAMWORK

Founded in Cork by Daniel Mackey and Peter Coppinger, they bootstrapped the company from a two-man operation to a growing global company with more than 200 employees working across 15 countries, and over 22,000 customers, including giants like Disney, Netflix and Spotify.

TENDERSCOUT

Tenderscout is an online platform which helps companies tender for government contracts. The Dublin-based start-up is expanding in Europe and North America, using an additional €1 million of investment secured in summer 2018. The firm, founded by Tony Corrigan in 2010, expanded into the US, UK and Canadian markets in 2016.

TERMINALFOUR

TerminalFour is a digital marketing and web content management system for Higher Education. Established by Piero Tintori in 1997 before moving into the UK in the early 2000s and then the US in 2009 the company now has two offices in San Diego and Boston and sell to over 100 US universities.

TEXTHELP

Texthelp is an Antrim, Northern Ireland-based firm, with a US office in Woburn, MA. Texthelp develops assistive technology solutions for reading, writing and language products for people with learning difficulties, dyslexia or visual impairments, English Language Learners (ELL) and those learning English as a Second Language (ESL).

TOTAL PRODUCE

With a turnover in excess of €3.5 billion, Total Produce is one of the world's largest fresh produce providers, has been pursuing a steady acquisition strategy within the US since 2013, and become an increasingly prominent force in the North American marketplace, with 500 employees across its US businesses. It operates in the US through the Oppy brand with offices in Seattle, WA, Tampa, FL, Visalia, CA, Chicago, IL, Los Angeles, CA, Houston, TX, Miami, FL, Newark, DE, and Eco Farms and Progressive Produce in California, Progressive Produce in Quincy, ZA, and Keystone Fruit Marketing, PA. Further to its expansion plans, Total Produce is expected to exercise its right to purchase all the shares in US-based Dole Food Company within five years, having acquired an initial 45 per cent stake for \$300 million in cash (€242 million) in late January 2018, bringing together two global brands and creating the world's leading fruit and vegetable group. It also recently took a 50 per cent stake in a California company, The Fresh Connection, which was announced in November 2017.

TOUR AMERICA

Mary McKenna started her business, Tour America, 23 years ago in her sitting room with a team of three. It is now Ireland's number one tour operator to the USA, Canada and Mexico, selling competitively priced holidays, and the number one seller of cruises. Tour America currently turns over €20m, has 50 staff, and offices in Dublin, Cork and Orlando.

TRANSFERMATE GLOBAL PAYMENTS

The official Global Payments Partner of the Ireland INC Index.

Headquartered in Kilkenny, Ireland, with over 200 staff and multiple offices across the globe TransferMate Global Payments is the market-leading choice for international banks and businesses who seek a simple, cost-effective solution when sending and receiving foreign currency payments. With one of the world's most extensive network of bank accounts, trading in over 145 countries, and processing over \$10 billion to date, TransferMate secures better exchange rates, eradicates bank fees and provides clients with faster payment services. TransferMate's innovative B2B technology platform integrates with a range of enterprise software systems, including the world's top cloud accounting platforms, this provides a faster, cost effective and easier payments solution to an increasing global client base.

TRINITY BIOTECH

Trinity Biotech was founded in 1992 and specialises in the development, manufacture and marketing of diagnostic test kits. A combination of organic growth and an acquisition-led strategy has seen the company assemble a portfolio of over 400 products to date. Headquartered in Bray, Co Wicklow, it is quoted on the NASDAQ exchange, and with facilities spanning Europe and America, it sells its products in more than 80 countries. It employs more than 350 people.

UDG HEALTHCARE

UDG Healthcare plc, formerly United Drug, is a Dublin-based international company and partner to the healthcare industry, providing clinical, commercial, communication and packaging services. It is listed on the London Stock Exchange, and is a constituent of the FTSE 250 Index. The company was established in Ballina in County Mayo as The United Drug Chemical Company, a co-operative controlled by Irish pharmacists, in 1948. The group operates in 24 countries with 9,000 employees globally. The major two of its three divisions, Ashfield and Sharp, operate across several sites in the United States. Recent expansions in the US include a \$14m pharmaceutical-grade packaging facility in Bethlehem, PA, and acquisitions including Cambridge Biomarketing, a US-based comms agency focused on orphan and rare diseases (up to \$35m), healthcare management consultancy Vynamic (up to \$32m), and Micromass, a US-based comms agency specialising in behavioural change (up to \$75.8m). Full year 2017 figures showed 52% of the group's revenue and 49% of the group's profits originated from North America.

URBANVOLT

UrbanVolt was founded in Dublin in 2015 by Kevin Maughan, Graham Deane and Declan Barrett, to provide light-as-a-service (LaaS®), a unique pay-as-you-save service which allows businesses to upgrade to LED light with no upfront cost. model makes it possible to upgrade one's business to LED light with zero upfront cost. The Dublin-headquartered company has offices in Chicago, IL and Fort Myers, FL., with plans to significantly ramp up operations in the US, with the creation of 100 jobs over the next three years.

VICLARITY

ViClarity is an award winning provider of Audit, Risk & Compliance management solutions to the Financial and Healthcare sectors. Founded in 2008, the company's founder John Sheehy relocated his family from Kerry to Boston in 2018 to focus on the growth of the company's customer base in the US. The company has offices in Boston, Massachusetts, Ireland and the UK.

VOXPRO

Voxpro has expanded quickly in the US over the past couple of years, with circa 700 employees currently. Voxpro launched its first US Centre of Excellence in Folsom, CA, in 2016, with 200 staff, followed rapidly by an announcement to create 450 more jobs there, and an investment in Athens, GA, where it aims to reach 500 jobs. Voxpro also has a sales and marketing office in San Francisco.

vSTREAM

VStream is an experiential technology agency with offices in Dublin, London and New York (within the Enterprise Ireland New York incubator). They use cutting-edge technology like augmented reality (AR) and virtual reality (VR), to create experiences and storytelling for global brands.

WISETEK

Wisetek is a Cork-based company that specialises in the recycling and repurposing of used hardware. Last year it merged its US operations with the parent company of US destruction services firm DataKillers. Wisetek anticipates growth in revenue to more than €50 million within the next two years. The new company will become one of the largest suppliers of refurbished IT equipment in the world. DataKillers is headquartered outside Washington DC, strategically located in close proximity to address both the US federal government market and America's largest data centre hub located in Virginia.

ZENITH TECHNOLOGIES

Zenith Technologies deliver manufacturing software systems to Life Sciences businesses. Founded in Cork in 1998, Zenith has 16 offices worldwide with over 800 employees. The US headquarters in Pennsylvania opened in 2006, with an additional office in Philadelphia opening in 2011. In 2017, two more US offices opened in San Francisco and San Diego. ■



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