

2010 SIXTH
ATLANTIC ALLIANCE CONFERENCE
Brussels, Belgium
October 20, 2010

Joy Wilson
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National Stone, Sand and Gravel Association
USA



U.S. Federal Government Actions During Recession

} Series of Nearly Two Trillion Dollars in "Bailout" Bills

- TARP
 - Fall 2008, \$700 B authorized
- ARRA "Stimulus"
 - Spring 2009, \$824 B authorized

} Health Care Reform

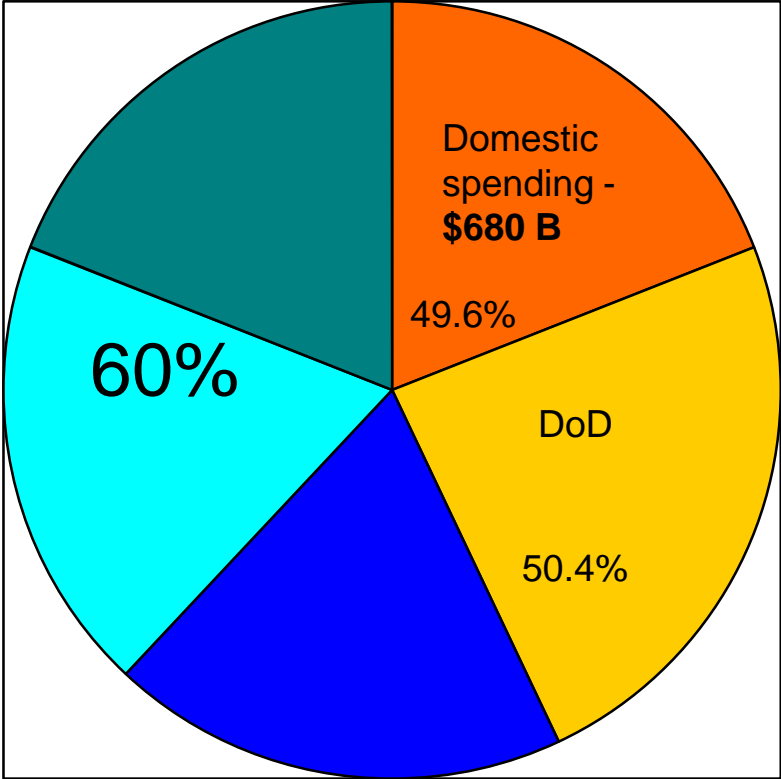
- Winter 2010 \$1 trillion initial estimated costs

} Unemployment remains stagnant – 9.6%

Impact of Recession to U.S. Federal Government Budget

- } 2010 Federal budget - \$3.6 trillion
- } 2010 Federal deficit - \$1.5 trillion
- } 2010 Federal debt - \$9.2 trillion

2010 U.S. Federal Government Spending



■ Discretionary - domestic

■ Discretionary - Defense

■ Mandatory - Medicare and Medicaid

■ Mandatory - Social Security

■ Mandatory - other retirement & income security spending

Recession Markets

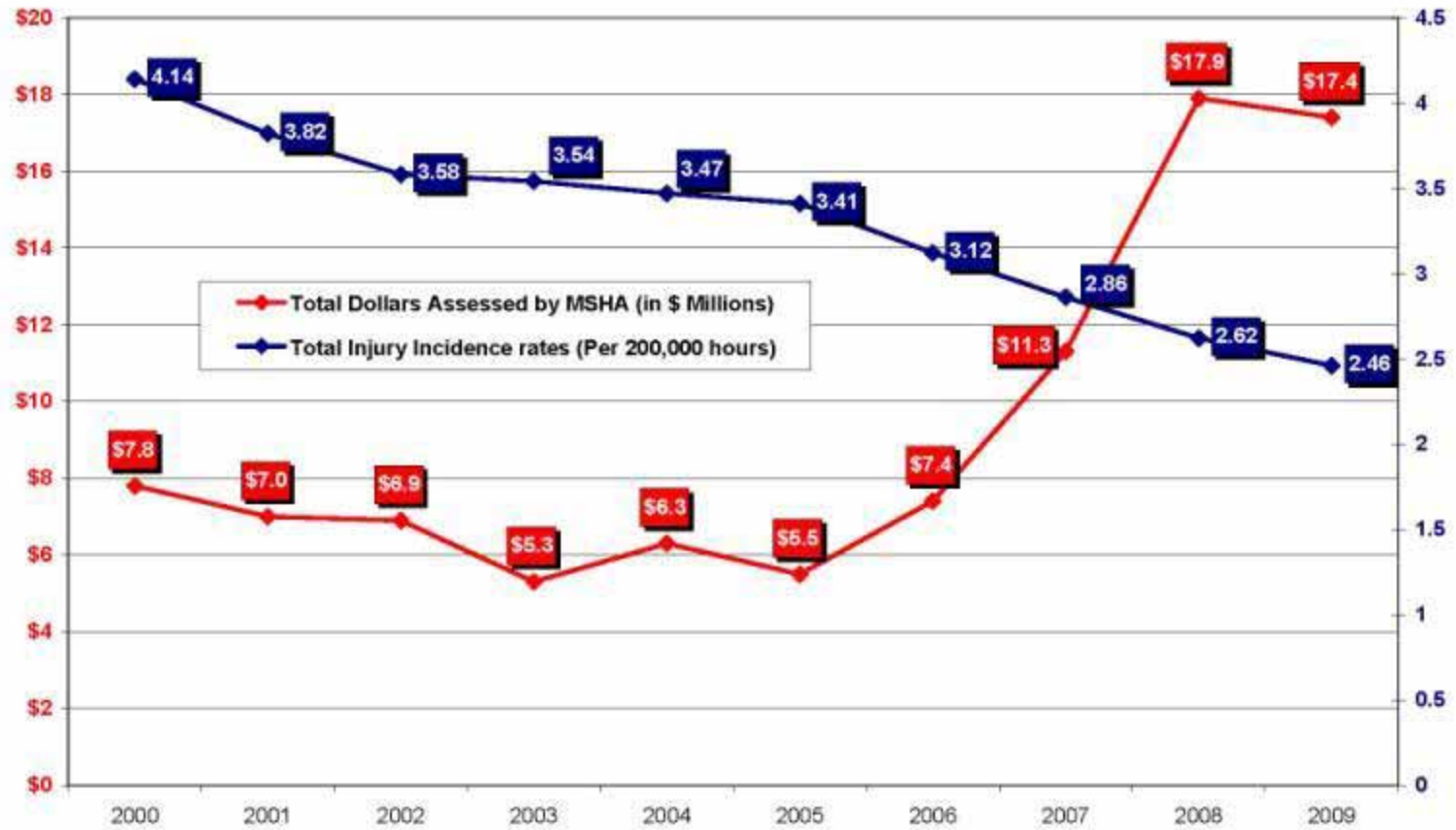


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Recession Markets



US AGGREGATES OPERATIONS



EPA

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Right to Work Issues

Recession Markets



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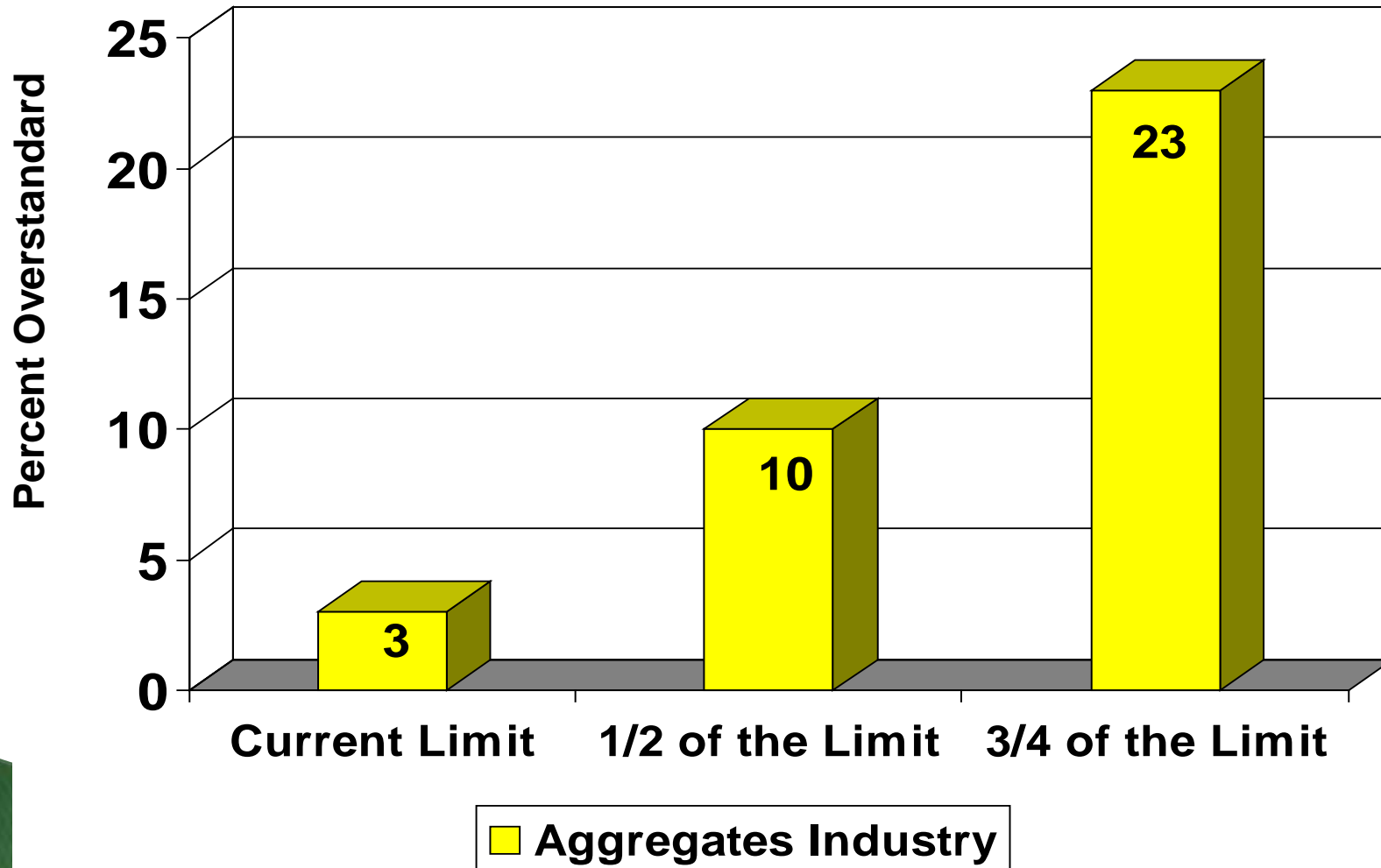
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Right to Work Issues

Recession Markets



Estimated % Change in Compliance with Occupational Exposure to Silica



Taxes

NIOSH

Right to Work Issues

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Recession Markets



Zero Tolerances

Taxes

NIOSH

Right to Work Issues

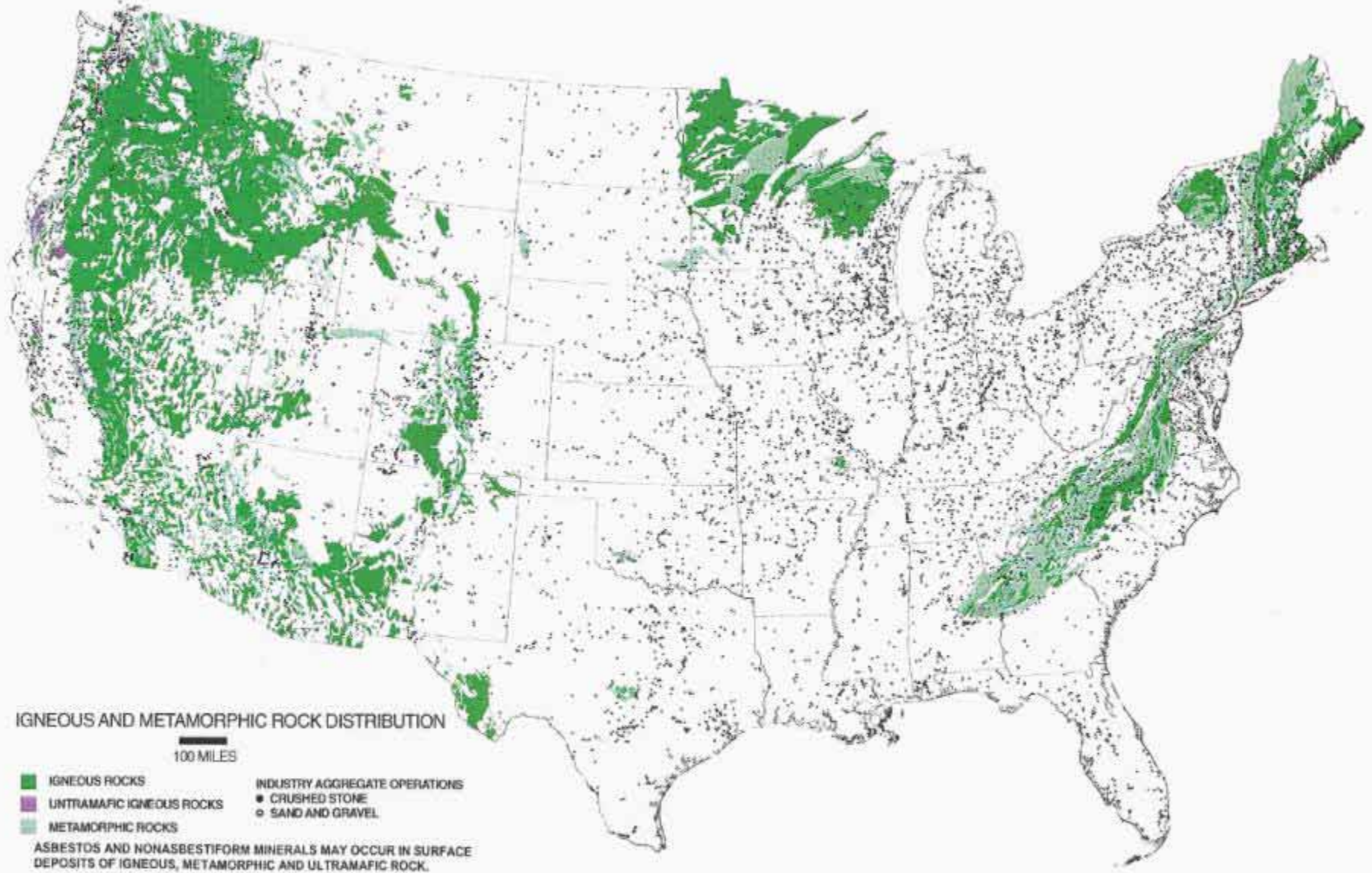
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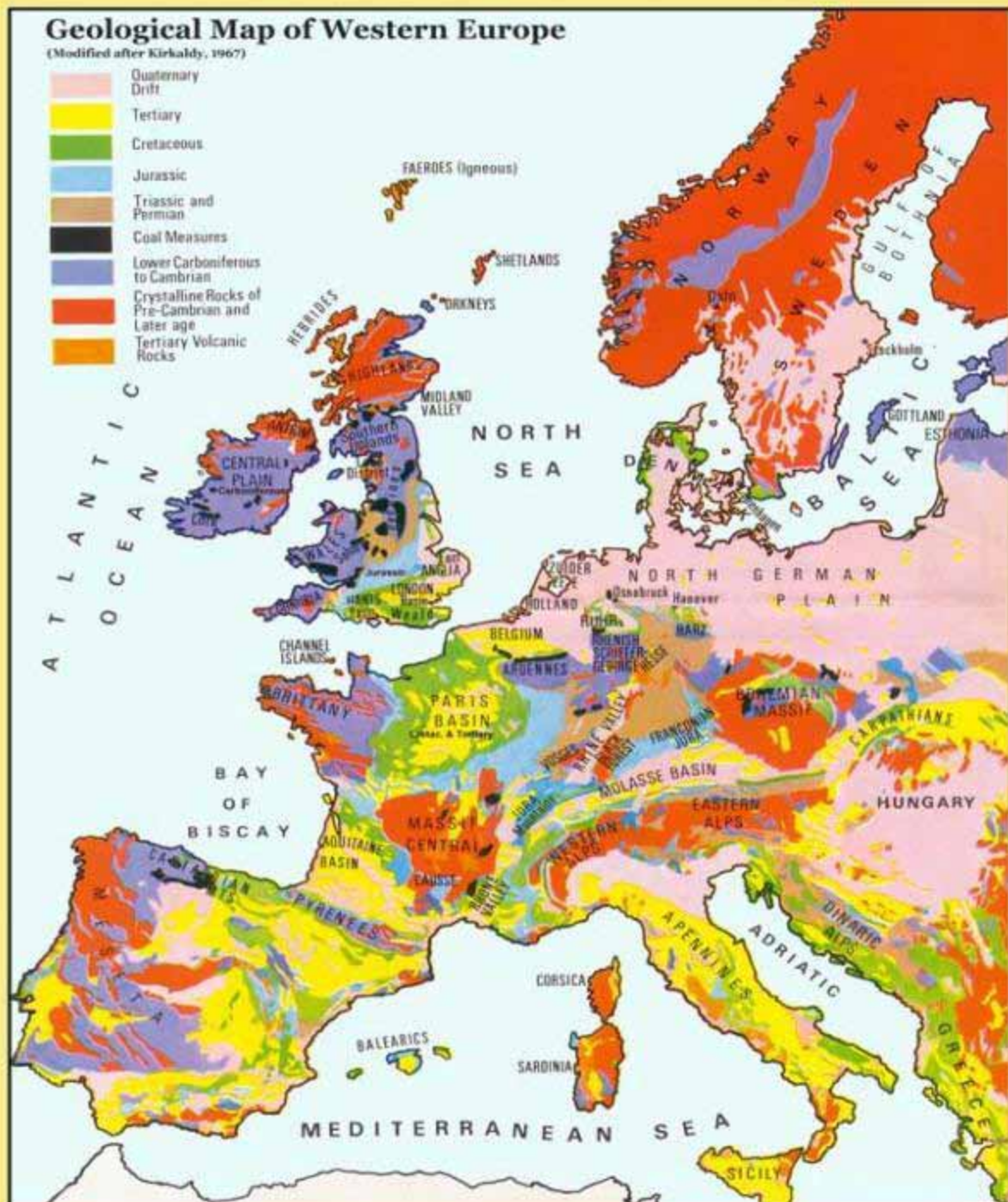
Asbestos is naturally occurring



Geological Map of Western Europe

(Modified after Kirkaldy, 1967)

- Quaternary Drift
- Tertiary
- Cretaceous
- Jurassic
- Triassic and Permian
- Coal Measures
- Lower Carboniferous to Cambrian
- Crystalline Rocks of Pre-Cambrian and Later age
- Tertiary Volcanic Rocks



Asbestos Fibers vs. Non-Asbestiform Fragments



Three Major Objectives Shared by Allied Organizations

1. Based on scientific consensus, fragments do not cause health-effects similar to Asbestos
2. Test methods should distinguish Asbestos fibers from Non-Asbestiform fragments
3. Naturally Occurring Asbestos (NOA) tolerances should be risk based and technically feasible

NIMBY – Livability Agenda

Zero Tolerances

Taxes

NIOSH

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NIMBY – Livability Agenda

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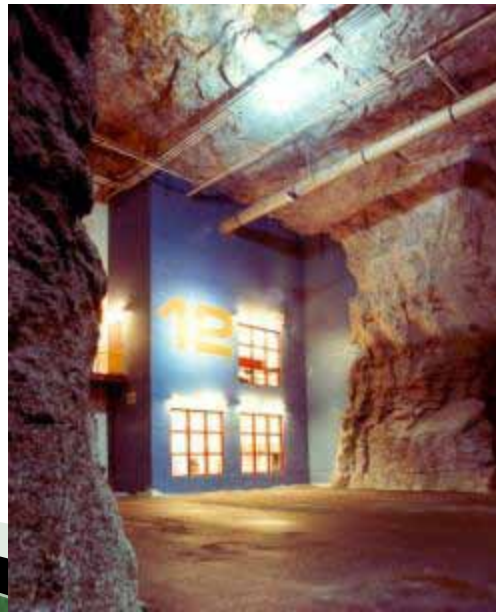


Huge Demand for Public Works

<i>In billions of dollars</i>	5-YEAR DEMAND	ESTIMATED SPENDING	SHARE OF DEMAND THAT WOULD BE MET
Rail	\$63	\$51	81%
Schools	160	125	78
Energy	75	46	61
Inland waterways	50	29	59
Drinking water and wastewater	255	146	57
Aviation	87	46	53
Hazardous waste and solid waste	77	34	44
Public parks and recreation	85	37	43
Roads and bridges	930	381	41
Dams	13	5	40
Mass Transit	265	75	28
Levees	50	1	2

How Underground Stone Mines Differ from Other Underground Mines

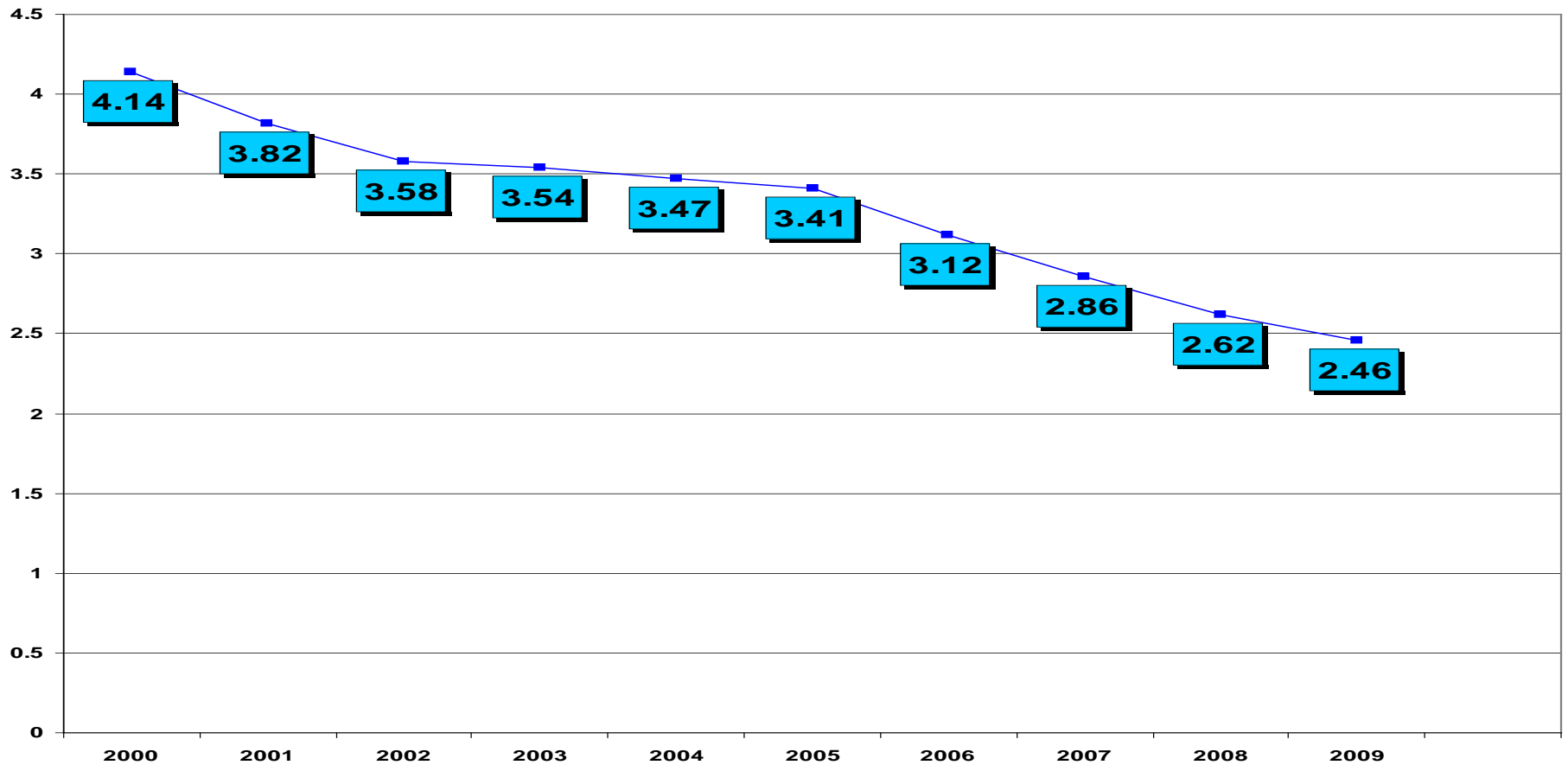
- } No flammable gases such as methane are present in underground stone mines
- } The stable geologic formations result in a minimized need for additional roof supports and offer commercial post-production value





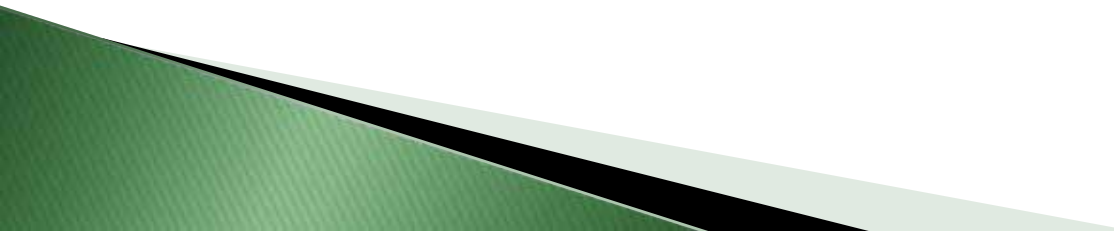
Aggregates Operator Injury Rate Improvements

Source: U.S Mine Safety & Health Administration



(Figure Equals number of injuries per 200,000 hours worked)

Safety Performance Tools

- } Safety Pledge – began 2003
 - } Core Safety Principles
 - } Newsletters to all industry CEOs – not just association members
 - } Magazine tearsheets used, for ex: tail gate safety talks
 - } Safety Pro “In a Box” coming before the end of the year
- 



Focus On
Safety



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