

AGGREGATE PRODUCERS of WISCONSIN



QUARTERLY NEWS

May 2016

Producers of Crushed Stone, Sand and Gravel

Message from the President

Renee Burcalow



As you may recall in my initial letter to you all I pledged to "...increase our association involvement with legislative issues that directly and indirectly impact our industry." I am pleased to report that our recent trip to Washington DC was extremely successful and will definitely move us closer to that goal. The contacts made during our trip, including Wisconsin Speaker Robin Vos (R-Burlington), Senate Majority Leader

Scott Fitzgerald (R-Juneau) and House Speaker Paul Ryan (R-Janesville) will prove to be helpful in our future efforts. Meeting with and educating our state delegates during the trip opens up lines of communication, helps them understand our perspective, and lays the foundation for future discussions.

June is just around the corner, and we are starting our regional meetings with Wisconsin state legislators. You may recall we are dedicating the entire month of June to this effort. Please plan to attend these meetings, or better yet: host a meeting. Reach out to your elected official and invite them to your business. Now is the time to share your information with senators and State Representatives and take them on a tour of your business. Share the pride you have for your work, your employees, and your colleagues. Our association director, Erin, will be calling you shortly to set up these meetings. I'm encouraging you to get involved.

This upcoming legislative session will prove to be HUGE and could have a long-term impact on our industry. Now is absolutely the time to get involved, get up to speed on the relevant issues, and actively support our fundraising efforts. If we don't someone else will.

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LEGISLATIVE REGULATORY REPORT

From the Executive Director

As the Aggregate Producers of Wisconsin's (APW) newly appointed Executive Director, I wanted to take a moment to introduce myself to you and highlight areas in which I will be most involved in APW's goals and directives. First and foremost, I would like to thank APW's board of directors for providing me with the opportunity to serve APW and I look forward to working with our board and membership in accomplishing our goals as an organization.

For the remainder of 2016, APW will be involved in preparing for what will be a large legislative initiative for the 2017-2018 legislative session. This initiative will involve every aggregate producer in Wisconsin, and it is my directive to ensure that all producers are educated in our legislative efforts for next year and beyond. With that said, APW will be holding regional meetings throughout Wisconsin for all members and potential members to highlight these efforts and increase awareness of issues that involve all aggregate producers. **It is imperative that each company has a representative attend in their prospective region to hear this important information that affects your operations.**

Letters will be going out in the mail detailing these regional meetings. Letters will also be going out to all non-APW members inviting them to attend and encouraging them to join

APW and our legislative efforts next session. If you are aware of non-members in your area, please encourage them to attend these regional meetings to hear all of what APW has to offer.

I would also like to highly encourage you all as APW members to participate in our organization in one way or another. APW has established four committees by which you can volunteer to serve: convention, membership, legislative, and regulatory. Many of these committee meetings are held via conference call and occur throughout the year when needed. Please consider giving your time to serve on these committees and participate in APW's association efforts. If anyone is interested in participating in a committee, please contact me via e-mail at: erinkruegerconsulting@gmail.com.

APW is poised to become an important player in the construction and road building arena in Wisconsin. Again, I would like to thank APW for allowing me to take the reigns as your Executive Director and I look forward to working with all of you and meeting you at our future events.



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LEGISLATIVE REGULATORY REPORT

APW Legislative Update

The 2016 election season is underway. All 99 state Assembly seats, as well as 16 of the 33 state Senate seats are up for election this year. Candidates for the Assembly and Senate are currently circulating nomination papers, which must be submitted by June 1. The primary election is August 9, while the general election is November 8.

Republicans currently control the Assembly with a comfortable 63-36 margin. The GOP is expected to retain control, but the Democrats could pick up a few seats. In the Senate, Republicans control the chamber with a narrower 19-14 margin. The GOP is also likely to retain control of the Senate, but a volatile election year nationally could affect state officials further down the ballot.

In the past several years, there has been a tremendous amount of turnover in the Legislature. In fact, less than half of the current members of the Assembly were in office for the controversial vote on Act 10 in 2011 which eliminated collective bargaining for state employees.

The number of retirements this year is much smaller than in recent years, but there are several legislators leaving both houses. In the Senate, Sen. Rick Gudex (R-Fond du Lac) is retiring after one term. This Fond du Lac/Oshkosh district is highly competitive and will be one of the main political battlegrounds in the state. In addition, Senate President Mary Lazich (R-New Berlin) is retiring after 24 years in the Legislature and Sen. Nikiya Harris-Dodd (D-Milwaukee) is retiring after one four-year term. Both seats are considered safe for the parties that now hold them.

A few members of the Assembly are leaving the chamber to run for the state Senate. Rep. David Craig (R-Big Bend) hopes to replace Sen. Lazich. On the Democratic side, Rep. LaTonya Johnson (D-Milwaukee) is seeking Sen. Harris-Dodd's open seat and Rep. Mandela Barnes (D-Milwaukee) is challenging Sen. Len Taylor (D-Milwaukee) in a primary.

Other retirements from the Assembly include Rep. Al Ott (R-Forest Junction), who is retiring after 30 years in office, and Reps. Dave Heaton (R-Wausau), Dean Knudson (R-Hudson), Tom Larson (R-Colfax) and John Murtha (R-Baldwin). Also retiring is Rep. Andy Jorgenson (D-Milton). Look for some of these open seats to be competitive this election cycle and potentially change party hands.

In total, there are between 6-12 seats currently held by Assembly Republicans that will be aggressively challenged by Democrats. These include Reps. Scott Krug (R-Nekoosa), Kathy Bernier (R-Chippewa Falls), Todd Novak (R-Dodgeville), Ed Brooks (R-Reedsburg), and Romaine Quinn (R-Rice Lake).

In the Senate, the open 18th Senate District covering Oshkosh/Fond du Lac will be a priority for both Democrats and Republicans and one of the main political battlegrounds. In addition, look for Senate Democrats to focus their efforts against Sen. Tom Tiffany (R-Hazelhurst), Sen. Sheila Harsdorf (R-River Falls, and Sen. Luther Olsen (R-Ripon). Republicans, however, will be mounting aggressive challenges against Sen. Julie Lassa (D-Stevens Point) as well as Senate Minority Leader Jennifer Schilling (D-La Crosse), who will be challenged by Dan Kapanke, a former state senator who she beat in a Senate recall election in 2011.

Election observers are looking forward to June 1, when the slate of candidates for both parties will be finalized. We will be providing further updates as the election season progresses.

APW members are encouraged to get involved in the elections by contributing to the PAC (see additional article) as well as attending fundraisers or getting to know candidates in other ways. The high amount of recent turnover shows the importance of building relationships with the people who are seeking to represent you.

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Water Resources Reauthorization Passes Senate Committee

In a display of unity last seen with the FAST Act, the first **multi-year highway bill in a decade**, Senate Environment and Public Works Committee Chairman Jim Inhofe, R-Okla., and ranking Democrat Barbara Boxer, D-Calif., joined forces to pass the Water Resources Development Act (WRDA) of 2016, S. 2848, on April 28.

NSSGA supported the bill that was approved by the Committee on a 19-1 vote, with only Sen. Deborah Fischer, R-Ne., voting no. Chairman Inhofe said that he hopes to have the bill on the Senate floor before the July recess.

WRDA authorizes \$9 billion of funding for maintenance and improvements to the nation's water infrastructure. At its core, S. 2848, authorizes future spending of \$3.4 billion for the new construction of 25 water resources projects. WRDA would allow new types of work to qualify for the Environmental Protection Agency's (EPA's) State Revolving Funds, the primary source of federal assistance to communities for water programs and a program for which NSSGA has urged full funding. The bill also creates several new grant programs including one to help small and disadvantaged communities replace lead service lines, a

\$100 million authorization for schools to test for lead and a \$50 million annual authorization for innovative water technology grants.

"This bill is not only fully paid for, it prioritizes projects to improve ports and waterways for increased global competitive advantage and supports needed flood control projects that protect millions of people and billions of dollars worth of infrastructure," said Inhofe. "This common sense legislation also includes both relief for communities with drinking water emergencies and nationwide support for clean water and safe drinking water infrastructure."

Of particular importance to Sen. Boxer are provisions that address the Flint, Mich., drinking water issue. "WRDA ensures that the American people have clean drinking water, provides flood protection, maintains navigation routes, and improves wastewater infrastructure," she said. "What happened in Flint has shown us how vulnerable some of our water systems are, and this bill is a perfect vehicle to upgrade our water infrastructure."

New Particulate Matter Rule in 2021

The Environmental Protection Agency (EPA) released a draft **schedule for updating their particulate matter standard**. According to the schedule, they are not planning to lower standards for at least another five years.

If the EPA were to lower the particulate matter standard, it could result in stricter production limits for air permits. The previous standard was issued in 2013, and included the retention of the coarse particulate standard (PM10) at 150 ug/m³ and a reduction in the fine particulate standard (PM2.5) to 12 ug/m³.

While the Clean Air Act requires that EPA review the standard every five years, it is not unusual to see delays in the extensive review process, which includes a review of the science, risk, and policy of the standard prior to issuing a proposed rule. Environmental groups have urged the EPA to speed up its review, but none have yet announced a lawsuit to force EPA to meet the statutory deadline.

NSSGA will continue to advocate on behalf of the aggregates industry on this important issue through comments and other advocacy initiatives.

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Uptick in Global Construction to Spur Growth in SCM Market, Reports BCC Research

Published: Apr 14, 2016 5:00 a.m. ET

WELLESLEY, MA , Apr 14, 2016 (Marketwired via COMTEX) – Global growth in the supplementary cementitious materials (SCM) market is expected to depend heavily on the global construction sector. BCC Research reveals in its new report that global infrastructure development, particularly in emerging economies in Asia-Pacific, Latin America, Africa, and the Middle East, should drive demand for SCM.

Supplementary cementitious materials are added to concrete mixtures and other building products to improve both their microstructure and resistance to environment hazards. Fly ash, ground granulated blast-furnace slag, and silica fumes are the most commonly used types of SCMs.

The global supplementary SCM market, valued at \$79.2 billion in 2015, should reach \$103.2 billion by 2020, reflecting a five-year compound annual growth rate (CAGR) of 5.4%. Fly ash as a segment totaled \$75 billion in 2015, and should reach \$98 billion by 2020 with a five-year CAGR of 5.5%. Slag cement as a segment, which reached \$4 billion in 2015, should total \$5 billion by 2020 with a five-year CAGR of 4.1%.

Fly ash accounted for a significant share within the global SCM market in 2014, accounting for over 70% of the volume and almost 95% of the revenue. Extensive utilization of fly ash in a host of industries, including construction and agriculture, should drive market demand. Increasing awareness among consumers regarding the benefits of using fly ash as a partial substitute for cement, which helps in lowering overall costs as well as reducing carbon footprints, is expected as another key market driver.

Within the global fly ash market, Asia-Pacific was the largest market, followed by North America. Abundant availability of the product has resulted in huge demand in these regions. In addition, relatively relaxed regulations regarding the use of fly ash in Asia-Pacific drove high consumption of the product. This trend should continue over the forecast period.

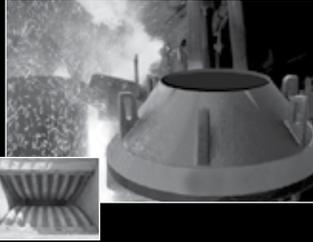
In 2014, Asia-Pacific was the largest producer as well as consumer of SCM. The region accounted for 68.3% of the global volume market in the same year. Rapid industrialization in the region has resulted in expansion of the infrastructure sector, leading to a huge demand for SCMs. In addition, rising awareness regarding the economical, mechanical, and chemical benefits of using SCMs in concrete mixtures has resulted in bolstering market demand.

“The positive economic outlook in Asia-Pacific, particularly China and India, is expected to drive demand for SCM in the region over the forecast period,” says BCC Research analyst Tanmay Joshi. “The focus of these two countries on infrastructure development is expected to augment demand for cement mixtures that include SCMs. China and India have included infrastructure development as a key focus area in each of their five-year plans.”

Supplementary Cementitious Materials: Global Markets and New Technologies (AVM128A) analyzes the key players, competitive intelligence, market dynamics, and geographic opportunities. The report also examines market drivers and obstacles, offers trends based on data from 2014, 2015, and projects CAGRs through 2020.



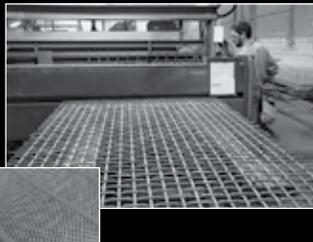
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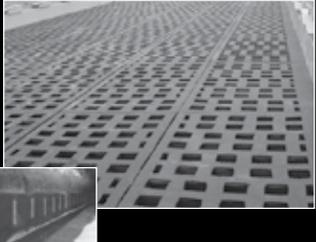
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National News

Old Quarry Near Runway Now Saves Airport \$430,000 a Year

AP – May 17, 2016

NASHVILLE, Tenn. (AP) — An abandoned rock quarry near a runway at Nashville International Airport was thought to be such a liability that authorities considered filling it in a decade ago. Now, the water-filled pit is enabling the airport to save \$430,000 a year.

By taking advantage of the quarry reservoir's year-round 50-degree temperature, the airport will be able to halve its cooling costs, said Christine Vitt, the airport authority's vice president of strategic planning and sustainability.

The geothermal system — the largest of its kind in North America — has been fine-tuned since it began operating in February, with results far beyond expectations, Vitt said at a dedication ceremony on Tuesday.

The system pumps hot water from the terminal's cooling plant to stainless steel heat exchangers submerged about 50 feet under the reservoir's surface. The heat exchangers are about the size of an SUV and work similarly to a car radiator. Water enters at about 79 degrees, is cooled by the surrounding reservoir water, and returns to the plant at about 63 degrees.

It's a closed-loop system, so the water never leaves the pipes, and the components should last a century or more, said environmental consultant David Rehse of Energy Systems Group, who worked on the system. And unlike solar panels, which are a visible sign that a building uses renewable energy, this geothermal system operates continuously underground, rain or shine.

It's "the greatest project in Nashville you can't see," Rehse said.

The \$10.4 million project is financed through grants and a loan that is being repaid with money that would otherwise have gone to cooling costs, as part of a sustainability plan created with help from the Federal Aviation Administration.

"Our operating budget doesn't increase," Vitt said in an interview. "What was maybe a liability has become a wonderful asset for us."



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APW BOARD OF DIRECTORS ESTABLISHES NEW APW COMMITTEES

The APW board of directors has established four new committees open to all APW members to aid in APW's organizational activities. The committees are: Membership, Convention, Legislative and Regulatory. Please consider taking the time to serve on one or more of these committees. APW values your expertise and appreciates any time that you can share in serving on a committee. If you are interested in serving, please contact the association office by e-mail at: erinkruegerconsulting@gmail.com.

APW MEMBERSHIP COMMITTEE DESIGNATES APW MEMBERSHIP REGIONS

The APW Membership Committee has established regions for APW membership to aid in our efforts in membership retention and recruitment. The regions will also provide opportunities for APW to increase our legislative efforts throughout the state. Please take a moment to review the regions and know where your pits and quarries fit into our new regional map.

APW ESTABLISHES A POLITICAL ACTION COMMITTEE FOR FUNDRAISING EFFORTS

The APW legislative committee and board of directors have established a Political Action Committee (PAC) for fundraising efforts on behalf of APW. This PAC will replace APW's conduit fund, as it will allow for a more efficient political giving process for the many fundraising events that APW will be participating in for the remainder of 2016 and beyond. Please consider contributing to the APW PAC!

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(262) 644-5030
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Slinger, WI 53086

ASSOCIATION CHANGES

APW has recently brought on a new Executive Director, Erin Krueger. The APW contact information remains the same. Please note Erin's cell phone number if you ever need to get ahold of her directly:

Erin Krueger

APW Executive Director
PO Box 2157
Madison, WI 53701
C: (608) 444-6214
P: (608) 283-2595
F: (608) 237-2299
erinkruegerconsulting@gmail.com
www.aggregateproducers.org

DATES TO REMEMBER

APW Annual Convention

Thursday, December 1, 2016
Holiday Inn, Stevens Point

The 2016 Membership Directory will be going out in late March. If your company has changes, please contact the APW office by email at erinkruegerconsulting@gmail.com.

Don't forget to check the APW website, www.aggregateproducers.org for industry related news.

APW has also recently brought on a new lobby team for the association. Their contact information is as follows:

Annie Early

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111 S. Hamilton St., Ste. 200
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(608) 259-1212
annie@martinschreiber.com

George Ermerit

APW Lobbyist
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george@martinschreiber.com

Focusing Your Political Resources

Aggregate Producers of Wisconsin Political Action Committee (APW PAC)

► Your APW PAC Contribution

- ◆ Aggregate Producers of Wisconsin Political Action Committee (APW PAC) is a PAC fund for the Aggregate Producers of Wisconsin.
- ◆ A PAC fund is organized to aggregate and disperse individual contributions on behalf of its members.
- ◆ Each APW PAC contribution you make is deposited into the APW PAC checking account.
- ◆ Donations to fundraising events are made through the APW PAC, and help to increase the visibility of APW's membership and our legislative interests.

► Targeting Your Resources

- ◆ APW reviews all legislative initiatives affecting your right and ability to conduct your business in Wisconsin.
- ◆ APW supplies you with all the information you need to understand how legislation will affect your business.
- ◆ Contributions are made to state elected officials of any party that supports APW's political initiatives.
- ◆ The APW and APW PAC are not aligned with any political party. We support those who are helpful to our industry.

► Questions & Answers

- ◆ Can I make a personal or business contribution? **A:** The APW PAC can only accept and disperse personal contributions.
- ◆ Why should I contribute to the APW PAC? **A:** Laws that negatively affect aggregate producers can be made at anytime. To protect your future, we need legislators in office who support our industry.
- ◆ Why should my contributions go through the APW PAC? Why not give directly to the candidate? **A:** It is more effective to give through the APW PAC. Through the APW PAC the aggregate industry receives credit for the contribution as well as the individual. A contribution through the APW PAC identifies both you and APW to candidates.

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APW Membership Regions



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Adams, Florence, Forest, Green Lake, Iron, Langlade, Lincoln, Marathon, Marquette, Menominee, Oneida, Portage, Price, Shawano, Vilas, Waupaca, Waushara and Wood counties.

Northeast Region

Brown, Calumet, Door, Fond du Lac, Kewaunee, Manitowoc, Marinette, Oconto, Outagamie, Sheboygan and Winnebago counties.

Northwest Region

Ashland, Barron, Bayfield, Buffalo, Burnett, Chippewa, Clark, Douglas, Dunn, Eau Claire, Jackson, Pepin, Pierce, Polk, Rusk, Sawyer, St. Croix, Taylor, Trempealeau and Washburn counties.

Southeast Region

Kenosha, Milwaukee, Ozaukee, Racine, Walworth, Washington and Waukesha counties.

Southwest Region

Columbia, Crawford, Dane, Dodge, Grant, Green, Iowa, Jefferson, Juneau, La Crosse, Lafayette, Monroe, Richland, Rock, Sauk and Vernon counties.