

# Indiana Mineral Industry News

## 1<sup>st</sup> Quarter 2006

By Kathryn R. Shaffer  
Indiana Geological Survey

### Production

Indiana **coal production** through the week ending April 1, was 9.1 million short tons, a 3.4 percent increase over the same period of the previous year, according to the **U.S. Department of Energy (DOE), Energy Information Administration (EIA)**. Indiana ranked eighth nationally as of April 1.<sup>1</sup> Both the EIA and the National Mining Association (NMA) predicted increases in production of coal in 2006. The EIA estimates an increase in production of 2.7 percent and the NMA an increase of 3.2 percent over 2005.<sup>2</sup>

About 1.73 million barrels of **crude oil** were produced in Indiana during 2005, ranking the state 23<sup>rd</sup>. About 3.13 million MCF of **natural gas** were produced during the same period and the state ranked 26<sup>th</sup> nationally in natural gas production.<sup>3</sup> In the first quarter of 2006, 472,445 barrels of oil and 675,123 MCF of natural gas were produced in the state.<sup>4</sup>

The most current data published by the **U.S. Geological Survey (USGS)** for the first quarter of 2006 showed **Indiana production of crushed stone** was 3.9 million metric tons (mt) and **Indiana production of construction sand and gravel** was 8.9 million mt, demonstrating increases of 5.9 percent and 5.5 percent for each commodity, respectively, when compared to the same period of 2005. Nationally, Indiana ranked 14<sup>th</sup> in crushed stone and 16<sup>th</sup> in construction

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sand and gravel among reporting states during the first quarter.<sup>5</sup> These USGS national aggregate quarterly reports were initiated many years ago by **Valentin Tepordei**, crushed stone commodities specialist, who announced his retirement this quarter after 26 years of service to the USGS. He will remain with the USGS on emeritus status, but his duties will be assumed by Jason C. Willett.<sup>6,7</sup>

Aggregate producers who responded to an **Aggregates Manager magazine survey** expect a good to excellent year in 2006, with 45 percent expecting a good year and 39 percent expecting an excellent year. About 87 percent of companies that produce both crushed stone and sand and gravel expect a good to excellent year. About 32 percent of those surveyed plan to invest in additional equipment. Fuel costs remain a significant concern.<sup>8</sup>

The **Portland Cement Association** expects **cement consumption** to reach 120 million metric tons in 2005 and increase to 125 million metric tons in 2006. This is an increase of 5.2 and 3.7 percent each year.<sup>9</sup> Because of the unprecedented demand for cement, which resulted in severe shortages, the U.S. and Mexican governments reached an agreement that by the year 2009, **antidumping duties** against imports of Mexican cement will be terminated. About 3 million tons of imports will be allowed over the next three years and during that time duties will be lowered from \$26 per ton to \$3 per ton. Mexican markets will also be opened to U.S. imports.<sup>10,11</sup>

During 2005 a new record was set for the fifth consecutive year for **Indiana wallboard**

**shipments** with a total of 36.16 billion square feet shipped.<sup>12</sup>

## **Industry news**

**Peabody Energy's Black Beauty Coal Company** is producing from its new **Miller Creek Mine** in Knox County. The mine was part of the block of properties acquired from Horizon Natural Resources during that company's bankruptcy proceedings. The surface mine should produce around 2 million tons annually.<sup>13</sup>

**Sunrise Coal Company** opened its **Howesville underground mine**. The mine should produce about 500,000 tons per year and have a lifespan of about 4 to 5 years.<sup>14</sup>

**Solar Sources** plans to open a 1 million ton per year underground coal mine sometime later this year on **Kindill #2 property** acquired from Horizon Natural Resources. The property was previously surface-mined.<sup>15</sup>

**Alliance Resource Partners new Gibson South Mine** is still in the permitting process, but estimated costs for development have risen to about \$100 million. The mine, expected to be in production in 2008 or 2009, could produce up to 3.8 million tons per year.<sup>16</sup>

**Solar Sources** sold its **Monroe City Mine** to **Peabody Energy's Black Beauty Coal**. The mine

has exhausted its reserves, but Black Beauty will use the mine to improve ventilation for its neighboring **Air Quality Mine** and also use preparation facilities to boost production from that mine. In return, Solar Sources will not be required to reclaim the surface on the mine property.<sup>17</sup>

The underground **White River Coal Co., Hazleton Mine**, was sold to Bronco Energy Fund for \$35 million. Annual production from the mine should be in the range of 1.45 million tons. Two years of contracts are already ensured.<sup>18</sup>

**James River Coal Company**, which last year acquired **Triad Mining**, is purchasing reserves in Pike and Warrick Counties and a rail loadout facility in Pike County from **Indiana Land and Mineral Company, LLC**. The property had previously belonged to Horizon Natural Resources. Although expanding in Indiana and Kentucky, James River Coal Company suffered a loss of \$9.3 million during the fourth quarter of 2005 and may be sold; the company has hired a financial advisor to look at options.<sup>19,20,21</sup>

The **Wabash Mine** which has its entrance in Illinois, but underlies part of western Gibson County, is undergoing \$50 million in upgrades including a new slope entry and improvements in coal handling and processing. Most of the mine's production is used in Indiana.<sup>22</sup>

**BGT Green Valley Project, LLC**, plans to build three engine/generator sets to produce power from **methane** gas extracted from abandoned coal mines near Terre Haute.<sup>23</sup>

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The State Utility Forecasting Group issued a report, **Indiana electricity projections: The 2005 forecast**, stating that Indiana could experience an increase of 11 percent in demand for electricity over the next five years. Indiana utilities may not be able to satisfy all of that demand.<sup>24</sup>

Approval was received from the U.S. Nuclear Regulatory Commission for the **merger of Duke Energy and Cinergy**.<sup>25</sup> The Indiana Utility Regulatory Commission and the North Carolina Utilities Commission have also given their approval. Shareholders of both companies approved the merger in March and it could be complete by April 1.<sup>26,27</sup> PSI Energy will be renamed Duke Energy.<sup>28</sup>

**Hanson Aggregates** is acquiring **Material Service Corp.**, a General Dynamics Corp. company. Material Service is based in Chicago, but has three crushed stone quarries in Indiana—**Babcock** in Jasper County, **Monon** in White County, and **Ward Stone Quarry** in Pulaski County. Hanson will pay \$300 million for the company.<sup>29,30</sup>

**Shelby Materials** will avoid prosecution and fines in the central Indiana ready-mix concrete price-fixing case owing to an early decision to testify against others.<sup>31</sup> Gus B. Nuckols III of **Builder's Concrete & Supply** will plead guilty in the conspiracy and may serve up to 21 months in prison and pay a personal fine of \$50,000 and a company fine of up to \$11.5 million, the strongest penalty recommended thus far, after being named a one of the organizers. Meetings were held on his property. On a more positive note, the company has been active in the

community, making many donations to civic projects.<sup>32,33</sup>

**U.S. Aggregates** is planning to open a second sand and gravel pit in the **Waverly** area, but is facing opposition from area landowners.<sup>34,35</sup>

**Brooks Sand & Gravel, LLC**, in Bethlehem on the Ohio River and another operation located in Kentucky, both owned by **Brooks Mining, LLC**, closed and filed for Chapter 11 bankruptcy protection. During operation, all product from the Indiana operation was shipped to the Louisville, Ky., area. The properties may be sold.<sup>36,37</sup>

**Illiana Block & Brick** will open a new concrete block plant in Gary on old Republic Steel property. The company already operates a plant in Michigan City.<sup>38</sup>

**General Shale** will expand production at its Mooresville plant with a \$30 million “ultra-modern,” completely automated robotic production line. Production is expected to nearly double to 200 million bricks per year, 90 million more than currently produced. The expansion is in response to increasing demand for their products. Construction will begin by mid-year.<sup>39</sup>

An oak log that was recovered from a **County Materials** gravel pit near Brownstown last year was determined by radiocarbon dating to be 2,000 years old. Wood from the tree may be marketed as lumber.<sup>40</sup>

The **National Stone, Sand and Gravel Association** recognized the winners of its **2005 About Face Awards** at an awards ceremony in March. The awards recognize aggregate operations for beautification efforts. **Hanson Aggregates, Mideast Region, Versailles Quarry** received one of the highest honors awarded, a Showplace award.<sup>41</sup>

**U.S. Gypsum Corp.** ranked first and **Vulcan Materials** ranked second on Fortune magazine's March 2006 list of "America's Most Admired Companies" in the building materials and glass category.<sup>42</sup> Both companies have operations in Indiana.

**Buzzi Unicem USA** received a **Portland Cement Association Safety Innovation Award** for a fall protection innovation employed at its Greencastle plant. The protection system consists of portable safety panels that easily but securely attach to existing hand rails.<sup>43</sup>

**U.S. dimension limestone fabricators** are anticipating a profitable year in 2006. Anticipating long-term growth they are purchasing equipment and making other investments.<sup>44,45</sup>

The Arcadia University's Landman Library in Glenside, Pa., was featured in an issue of **Stone World magazine**. Renovations and an addition were made to the limestone-clad structure with stone provided by Heltonville Limestone Co.<sup>46</sup> Indiana limestone was also used in other projects highlighted in the publication. The Paul Barret, Jr., Library at Rhodes College in Memphis, Tn., was constructed of rubble and trimmed with 21,700 cubic feet of Indiana limestone and Vermont

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slate.<sup>47</sup> Limestone was also used to trim the renovated John M. Olin Library at Washington University in St. Louis, Mo., and the Princeton University Chapel at Princeton, N.J.<sup>48,49</sup>

## **Environmental issues**

**The Indiana Department of Environmental Management** created an improved online air permit search engine. It is available for use at <<http://www.in.gov/ai/appfiles/idem-caats/>>.<sup>50</sup>

**Vectren Corp.** received approval from the **Indiana Utility Regulatory Commission** for its environmental compliance plan. When the plan is implemented, the company's power plants will be scrubbed 100 percent for SO<sub>2</sub>, 90 percent for NO<sub>x</sub>, and mercury emissions will also meet standards. As part of the plan, a scrubber will be added to **Alcoa's Warrick station unit 4** which the two companies co-own. This scrubber is expected to be installed by 2010. Also as part of the plan, Vectren plans to shut down **Culley Unit 1** by the end of next year and to install a fabric filter which should be completed by the middle of 2007 at **Culley Unit 3**. The station's other two units are scrubbed.<sup>51,52,53</sup>

A federal appeals court found the **U.S. Environmental Protection Agency's (EPA)** recommended **New Source Review Equipment Replacement rule**, which would allow power plants to make certain repairs to existing equipment without being required to install additional pollution control equipment, to violate the requirements of the **Clean Air Act (CAA)**. The CAA

requires power plants to upgrade pollution control equipment whenever any improvements other than routine maintenance occur. The rule had been in litigation since 2003.<sup>54</sup>

### **Construction industry developments**

An increase of 5.7 percent in **highway construction** is predicted during 2006 by the **American Transportation and Road Builders Association (TRIP)**—a record \$70.3 billion for highway and bridge work. However, projected higher costs for cement, oil, and steel could have a negative impact on construction industry profits; prices of highway construction materials are expected to increase 13 percent over 2004.<sup>55</sup>

**Northern Indiana Public Service Company's (NIPSCO)** agreement to sign over the abandoned **Mitchell power plant** to the city of Gary was countermanded by the **Indiana Utility Regulatory Commission**, which refused to approve the transaction. The city had planned to redevelop the lakefront property and also use part of it for expansion of the **Gary/Chicago Airport**. The Gary/Chicago Airport will receive \$57.8 million from the U.S. Department of Transportation for airport improvements.<sup>56</sup> The plant was closed when the steel industry declined a few years ago, but with resurgence of the industry there is some concern that the power plant might be needed in the future. Consumer groups contend that consumers have been forced to pay more for electricity since the closure of the plant.<sup>57</sup>

Several new **hospital building and improvement projects** were announced: a new \$170 million hospital is planned for Lafayette; a new \$24 million hospital is planned for White County; a new hospital will be built on 42 acres in Whitley County; and a \$120 million expansion will be added to the Muncie hospital.<sup>58,59,60,61</sup>

**Shoe Carnival** will build a new \$40 million corporate headquarters and national distribution center in Evansville<sup>62</sup>

Phase II of the **Marquette Plan** was unveiled. This phase calls for improvements to the 24 miles of Lake Michigan shoreline between the Port of Indiana and the Michigan state line. The first phase improved the lakeshore from the Port of Indiana to the Illinois state line.<sup>63</sup>

A new **bridge** will be constructed across the **Ohio River** at Madison with construction starting around 2012.<sup>64</sup>

Ground was broken in Jeffersonville on the \$41.7 million **Ohio River Greenway project**. Recreational trails with scenic overlooks will be constructed.<sup>65</sup>

The **Ports of Indiana** (Mount Vernon, Jeffersonville, and Burns Harbor/Portage) reported a record-breaking year in 2005 with more than \$1 billion in cargo handled. Top commodities shipped through the ports, in order of volume, were grain, coal, steel, limestone, fertilizer, salt,

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asphalt, and cement.<sup>66</sup>

## Legislation and regulatory issues

The President announced the **Advanced Energy Initiative** during his January State of the Union address. Under the initiative, more than 75 percent of oil received from the Middle East would be replaced by renewable fuel sources by the year 2025. To achieve this goal, **innovative technologies** will be encouraged.<sup>67</sup> In Indiana this has resulted in an explosion of **ethanol** plant design and development. An \$82 million ethanol plant will be built near Rushville in Shelby County by Rush Renewable Energy. About 60 million gallons of ethanol is expected from the plant annually, with a potential expansion capacity of 100 million gallons per year.<sup>68</sup> A \$100 million ethanol plant is being built in Montgomery County near Linden by ASAlliances Biofuels, LLC.<sup>69</sup> Another will be built in Clymers in Cass County by The Andersons, Inc.<sup>70</sup> One will open at Cloverdale in Putnam County this year. Marion in Grant County and Rensselaer in Jasper County also will have new ethanol plants.<sup>71</sup> Air pollutant emission levels may be increased from 100 tons per year to 250 tons per year for corn milling facilities that process corn for ethanol production to help support the industry.<sup>72</sup> The world's largest biofuels plant will be built near Claypool in Kosciusko County. Plans include \$100 million for a soybean-processing plant, \$80 million for a biodiesel plant and \$100 million for an ethanol plant. Biodiesel plants are also being constructed in Hammond and Morristown.<sup>73</sup> There was only one ethanol plant in the state at the start of 2005.<sup>74,75</sup>

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As a part of the initiative and in addition to the emphasis on renewable energy sources, \$2 billion over 10 years will be spent on **clean coal technology research**.<sup>76</sup> One project being funded is the **FutureGen** project that will sequester carbon emissions underground. The **Fifth Annual Conference on Carbon Capture and Sequestration** was held in May in Alexandria, Virginia. Geological considerations of sequestration were studied at the conference.<sup>77</sup> Data is currently being examined, using the National Carbon Sequestration Database and Geographical Information System (NatCarb) to determine the best location for the high-tech power plant.<sup>78</sup> Projects are also underway to develop hydrogen turbines for the project.<sup>79</sup> A site selection process for the plant was announced in February. Site selection should be completed by fall of 2007 with the plant in operation by 2012.<sup>80</sup> As another part of the Initiative, the DOE is also funding research on coal-to-liquid fuels.<sup>81</sup>

Following two major **coal mine disasters in West Virginia**, MSHA instituted an emergency temporary standard to make **improvements to mine safety** that included requiring additional Self-Contained Self Rescue Devices (SCSR's) underground, installation of lifelines, additional training on the use and switching of SCSR's, and a requirement for the immediate notification of MSHA following an accident.<sup>82,83</sup> The agency is also working on improved wireless communication.<sup>84,85,86</sup> Currently a few mines, including **Black Beauty Coal's Air Quality mine** in Knox County, have an electronic text-service, primarily used by supervisors to communicate underground. The system is reported to work about 90 percent of the time, dependent on mine design.<sup>87</sup> Federal legislation was introduced to stiffen mine safety requirements under the Mine

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Safety and Health Act. Penalties for violations are also increased under the legislation, and major fines increased from \$60,000 to \$222,000. In addition, an operator could be charged \$100,000 for failure to inform the U.S. Mine Safety and Health Administration within 15 minutes of an accident.<sup>88,89,90,91</sup>

In Indiana, as an outcome of the heightened national interest in mine safety, underground mine inspections were reinstated by the **Indiana Bureau of Mines and Mining Safety**. The inspections had been suspended owing to low funding, the loss of an inspector, and the perception that it duplicated efforts of the U.S. Mine Safety and Health Administration. John Alaria, Deputy Commissioner of the Indiana Bureau of Mines and sole member of that department, resigned from his post because of the difficulty of completing inspections of all underground mines adequately each quarter by one person.<sup>92,93</sup> The issue is of heightened concern because an estimated 3,500 new, inexperienced miners will be working in the state's coal mines within five years.<sup>94,95</sup>

Under a recent ruling by a federal appeals court, **MSHA** can be held responsible for inspections in which they are found to be negligent. This finding may make the agency more responsive to reports from whistleblowers.<sup>96,97</sup>

The **EPA** launched a **Web site** (<http://www.epa.gov/compliance/complaints/index.html>) where individuals can file complaints against companies they believe to be in violation of federal environmental regulations.<sup>98</sup> Companies that report their own violations to the EPA may receive

lessened penalties. The EPA is hoping to encourage better environmental compliance with this strategy.<sup>99</sup>

The **U.S. Army Corps of Engineers'** proposed budget for the next fiscal year is \$4.73 billion for civil works projects, the largest ever requested. The budget includes funding for work on the **Ohio River McAlpine Lock** in the amount of \$70 million.<sup>100</sup>

**Indiana House Bill 1008** was passed into law on March 14. The bill amends current state law in regards to **toll roads** and allows for some **public-private agreements** to manage toll roads, roads, and bridges.<sup>101</sup> The highest bid of \$3.85 billion for operating the current and planned toll roads was **Statewide Mobility Partners**, a company with Australian and Spanish ownership. This is \$1 billion more than needed to fund **Major Moves**; the extra money would be invested to fund additional transportation projects. The lease would last for 75 years.<sup>102</sup> The bill will also provide an additional \$75 million to local governments for each of the next two years to help take care of a backlog of projects. A breakdown of that funding by city and county is provided by the **Asphalt Pavement Association of Indiana** at the Web site <<http://www.indianacountycommissioners.org/PDF/3-17-06.Major.Moves.pdf>>.

## Metals

**Steel industry prices** are expected to show moderate overall growth in 2006, with U.S. companies matching production and prices to market demands. Excess industry growth in China is still a concern to world steel markets.<sup>103</sup> It is expected to be a stable year.<sup>104</sup>

**Mittal Steel N.V.** launched a hostile take over of **Arcelor S.A.**, headquartered in Luxembourg. The merger of these two giant steel companies would result in production of steel estimated to be in excess of 100 million tons per year. Mittal Steel is already the world's largest steel company and Arcelor is the second largest; the combined company would consist of 61 mills in 27 countries. Mittal Steel has holdings in Indiana. To encourage Arcelor SA to accept the acquisition, a tour for about 50 foreign journalists was held at the Burns Harbor Plant.<sup>105</sup> Some observers voiced concerns that more effort and improvements will be put into plants in third-world nations where labor costs are lower.<sup>106,107,108,109</sup> With the integration of ISG and Ispat Inland into Mittal Steel, some employee compensation packages have decreased.<sup>110</sup> The company is idling some of its lines at the Indiana Harbor mill, but no jobs will be lost. The company is optimizing the use of its equipment with the transfers.<sup>111</sup>

Some experts have postulated that **Arcelor S.A.** is considering a take-over of **U.S. Steel Corp.** to prevent itself from being absorbed into **Mittal Steel**. Mittal Steel cannot acquire U.S. Steel Corp. because of antitrust issues. However, U.S. Steel Corp. is reportedly considering merging with A. K. Steel Corp. Merged with A. K. Steel, U.S. Steel Corp. would be the world's sixth largest steel

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company. Arcelor S.A. has denied interest in acquiring U.S. Steel Corp.<sup>112,113,114</sup> U.S. Steel experienced a strong year in 2005, and earnings reached the second highest level ever attained. Work was completed on the Gary No. 14 blast furnace. Production is expected to reach at 9,200 tons of hot metal each day with the rebuilt furnace.<sup>115</sup> U.S. Steel announced a new common stock repurchase program to boost the repurchase from the 5.8 million shares achieved in 2005 to 8 million shares.<sup>116</sup>

Although total earnings dropped in 2005, **Steel Dynamics** reported that 2005 was still a good year and the company experienced record-setting production in some divisions. Improvements are planned for the Flat Roll Division, which should increase production to about 2.7 million tons in 2006. Additional improvements could boost production at the **Butler mill** to 3.0 million tons in 2007. Improvements are also planned for the **Pittsboro bar products mill**.<sup>117</sup> The company may expand the **Columbia City mill** if it can resolve energy requirement issues. The expansion is estimated to cost \$200 million and will allow the company to expand its product line.<sup>118</sup> The company is also planning to double the size of its **Jeffersonville plant**, spending about \$39 million on the project. The plant produces galvanized steel. The money will be spent to make improvements so that the plant can produce pre-painted, acrylic-coated, and aluminum-zinc alloy coated steel.<sup>119,120,121</sup> The company is forming a joint venture with **Primix Corporation** called **Dynamic Composites, LLC**, to produce “high-strength, long-life composite railroad ties.” The new plant, at an undisclosed location, should be in production by close of 2006.<sup>122</sup> Steel Dynamics was named to Forbes magazine’s annual list of America’s Best Big Companies.<sup>123</sup>

**Nucor Corp.** experienced record production, shipments, and sales to outside customers in 2005, and expects the first part of 2006 also to be good.<sup>124</sup>

**TWB Co.**, which laser-welds steel sheets for the automobile industry, noted that its move from North Vernon to Columbus, Ind., two years ago was the right decision for the company. It is now located near a major interstate, I-65, has a larger facility, and additional property on which to grow. The company's production and employment has increased in those two years.<sup>125</sup>

**Macsteel Service Centers USA, Inc.**, recently acquired **Alpha Steel**, a Hammond-based company that distributes hot rolled and structural steel products. The company will operate under the **Macsteel Service Centers USA** name.<sup>126</sup> Macsteel's Huntington steel heat-treating operation is expanding, adding about 16,000 tons of bar and tube capacity by early 2007.<sup>127</sup>

**Steel Technologies, Inc.'s**, Portage flat-rolled steel plant is adding a \$13 million expansion for storage. Employment will increase by 45.<sup>128</sup>

**Vincennes Steel**, a steel processing company that produces steel girders for bridges, has been in bankruptcy proceedings because of the high costs of healthcare and transportation, a lower price for steel, and general slowdown of the economy. However, the company has made financial progress and it was purchased by **Kokosing Construction Company** in March.<sup>129,130</sup> The steel company was renamed **Wabash Steel**.<sup>131</sup>

**Beta Steel** requested and received a tax break for making improvements to its mill in Portage that will allow it to remain in operation. The improvements also allows the company to produce larger steel coils.<sup>132</sup>

**Levy Company** union employees have been striking since August 2005. The company announced in March that they would begin hiring permanent replacement workers. The union contends that federal law prohibits them from doing this. Levy Company processes slag and reclaims metal for the steel industry.<sup>133</sup>

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# Indiana Mineral Industry News

## 2<sup>nd</sup> Quarter 2006

By Kathryn R. Shaffer  
Indiana Geological Survey

### Production

Indiana **coal production** through the week ending July 1 was 18.4 million short tons, a 6.7 percent increase over the same period of the previous year according to the **U.S. Department of Energy (DOE), Energy Information Administration (EIA)**. Indiana ranked seventh nationally as of July 1.<sup>1</sup> The U.S. recorded record production for the year 2005 with 1.13 million short tons produced.<sup>2</sup>

**Crude oil** prices rose to over \$75 a barrel in April, a record price, primarily because of reduced supply and Middle East political tensions.<sup>3,4</sup> By the end of the quarter it had dropped to \$70 per barrel.<sup>5</sup> To help the supply situation, deposits to the **U.S. Strategic Petroleum Reserve** were suspended.<sup>6</sup> In the long term, crude oil's share of energy demand is expected to decrease. By the year 2030, the U.S. Energy Information Administration expects crude oil to average \$57 a barrel; this will most likely result in a decrease of 33 percent in crude oil consumption by that year. The agency forecasts that the difference in demand will be made up by the use of alternatives including coal, natural gas, and renewable fuels.<sup>7</sup> Through the first quarter of 2006, 913,303 barrels of **oil** and 1,409,153 MCF of **natural gas** were produced in the state.<sup>8</sup>

The most current data published by the **U.S. Geological Survey (USGS)** for the second quarter

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of 2006 showed Indiana **production of crushed stone** was 17.4 million metric tons (mt) and Indiana **production of construction sand and gravel** was 9.1 million mt, demonstrating increases of 2.3 percent and 3.5 percent for each commodity, respectively, when compared to the same period of 2005. Nationally, Indiana ranked 10<sup>th</sup> in crushed stone and 14<sup>th</sup> in construction sand and gravel among reporting states during the second quarter.<sup>9</sup> Nationwide, aggregate production is expected to increase by 2.1 percent each year over the next 5 years, according to industry experts.<sup>10</sup>

The Portland Cement Association predicts **cement production** to increase by 16.2 million tons over current production levels through the year 2010.<sup>11</sup>

**Gypsum** demand is expected to increase, globally, by 4.4 percent each year through 2009 owing to increased demand for drywall. Most drywall sales (54%) were from North American during 2004.<sup>12</sup>

## **Industry news**

Preparations for the new **Alliance Resource Partners Gibson South underground mine** are continuing. An overhead coal-conveyor belt is being installed that will cross U.S. 41 and reduce truck traffic. Startup of the mine is dependent on the market, but is tentatively scheduled for 2008 or 2009, and about 3.1 million short tons of production per year is expected from the mine.<sup>13</sup>

Peabody Energy's Miller Creek Knox Pit is expected to ramp up production this year.<sup>14</sup>

**Vectren Fuels will open two underground coal mines** in the Vincennes area to be opened in 2009 and 2010.<sup>15</sup> They will replace tonnage from the **Cypress Creek** surface mine, which will be depleted within the next few years.<sup>16</sup> The new mines will have about 80 million short tons of recoverable reserves which will average 6 pounds of sulfur per ton.<sup>17</sup> The company's **Prosperity mine** had reduced production during the first part of the year because of poor geologic conditions, but conditions are expected to improve very soon as the area is mined through.<sup>18</sup> A rescue chamber was created and stocked at the **Prosperity** mine in response to heightened concerns following recent coal mine disasters in other states.<sup>19</sup>

**Bronco Hazleton Co.**, which operates the **Hazleton underground mine** in Gibson County, filed for Chapter 11 bankruptcy. The mine is expected to stay in operation without any employee layoffs.<sup>20</sup> The mine could be sold.<sup>21</sup>

**The National Mining Association** started a new Web site (<http://www.futurecoalfuels.org/>) with information about **coal-to-liquids technology**.<sup>22</sup>

**Imperial Petroleum, Inc.**, headquartered in Evansville, sold some of its oil and gas assets and will use the proceeds to retire some of the company's debt.<sup>23</sup>

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**Kinder Morgan Energy Partners and Sempra Pipelines & Storage** held meetings in June to discuss their \$4 billion plan to build a **gas pipeline** they are calling “Rockies Express,” to carry natural gas from Colorado and Wyoming to the Midwest and East. They plan to start construction of the eastern portion of the route by spring of 2008, if federal approval is received. The companies plan to use already established utility corridors.<sup>24</sup>

In **ethanol-related news**, two new \$125 million ethanol plants will be built near Tipton in Tipton County and Mount Vernon in Posey County;<sup>25,26</sup> several \$150 million plants are planned, one near Montpelier in Blackford County, one near Harrisville in Randolph County, and one at an undisclosed location in Fayette County.<sup>27,28,29</sup> A \$175 million plant is planned near Portland in Jay County, and a \$200 million plant is being considered for Huntington in Huntington County.<sup>30,31</sup> A second ethanol plant is also planned for Mount Vernon, this one at the port.<sup>32</sup> However, plans for an ethanol plant in Wells County have been dropped because of concerns about road improvements necessary to accommodate the plant.<sup>33</sup> At least 49 ethanol **refueling stations** should be in service by the end of the year.<sup>34</sup> **Senator Bayh** made an appeal for the U.S. Senate Subcommittee on Energy and Water to triple the number of E-85 pumps in the country for an estimated \$8 million.<sup>35</sup>

**Duke Energy and Cinergy** completed their merger. Duke is now one of the largest energy companies in the North America.<sup>36</sup> It plans to separate its gas and electric power business into two distinct companies.<sup>37</sup>

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**Hoosier Energy** will build a 258-megawatt natural-gas-powered peaking power plant in Lawrence County.<sup>38</sup>

**State Line Energy** plans to install new turbine engines on its **Hammond** power plant.<sup>39</sup>

**Hanson PLC** acquired **Material Service Corp. from General Dynamics Corp.** The deal included three northwestern Indiana crushed stone quarries.<sup>40</sup>

**Dave O’Mara** acquired **Spray Sand & Gravel** in February near Seymour in Jackson County.<sup>41</sup>

**Forbes Magazine** named **Vulcan Materials Co.** as one of America’s “Most Admired Companies” based on eight criteria. It ranked first in its category for use of corporate assets, financial soundness and long-term investment.<sup>42</sup> **Vulcan Materials Co.** has eight aggregate operations in Indiana. The company also made the top of **Pit & Quarry’s** 2006 list of high-volume producers, followed by **Martin Marietta Materials, Inc.**, and **Hanson Building Materials**—all with operations in Indiana.<sup>43</sup>

**Martin Marietta’s** request to rezone 96 acres so that it could expand its mining operation in Carmel was denied in April owing to objections from its residential neighbors.<sup>44</sup>

**The Indiana Department of Environmental Management** held a hearing to discuss a potential

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air permit for **U.S. Aggregates'** planned second sand and gravel pit in the **Waverly** area. About 50 residents showed up at the hearing opposing the new pit.<sup>45,46</sup>

**Illinois Block and Brick** will build a third pre-cast concrete products plant in Indiana. The new plant will be at Gary, having close access to the Chicago market. The company's other two plants are at Michigan City and South Bend. The state is loaning the company \$8.7 million for the development that will create 20 to 30 jobs.<sup>47,48</sup>

**Irving Materials, Inc.**, is planning to build a concrete plant at River Ridge in Clark County. The land lease would be for a period of about 10 years until major construction projects in the area are completed.<sup>49</sup>

**Gus Nuckols III and Builder's Concrete & Supply Co., Inc.**, located in Fishers, will plead guilty to fixing prices on ready-mixed concrete with Irving Materials and other companies in the Indianapolis area from July 2000 to May 2004. The company was fined \$4 million and a jail sentence will be served.<sup>50,51</sup> **Scott D. Hughey of Hughey, Inc.**, which operates **Carmel Concrete Products**, and two executives of **Beaver Materials Corp., Chris Beaver and Ricky Beaver**, also agreed to plead guilty to price fixing in the ongoing investigation.<sup>52,53</sup>

An accident at **B. G. Hoadley's Maple Hill Quarry** killed one employee and seriously injured another when a block of cut stone fell.<sup>54</sup>

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There was a fire at the **Lehigh Cement Company** plant in Mitchell in June when a rubber belt in the clinker transport system from the kilns to the roll crusher ignited. The equipment was considered nonessential and did not shut down the plant.<sup>55</sup> Two **Essroc Cement Corp.** cement trucks were hit by trains in separate accidents in June.<sup>56</sup>

**U.S. Gypsum** reported record shipments of wallboard in 2006.<sup>57</sup> The company announced that it was emerging from Chapter 11 bankruptcy. The plan includes establishment of a trust fund to make payment for asbestos health claims.<sup>58</sup>

**Oglebay Norton** sold six ships, but arranged long-term contracts with the purchaser for transport of limestone from Michigan on the Great Lakes. The company will also sell the remaining three ships.<sup>59</sup>

**Steel and limestone shipments** through the port at **Mount Vernon** show steep increases over the previous year. In the first quarter, steel shipments were three times as much as during the same time last year and limestone shipments were 179 percent more than the previous year. Other commodities have also increased.<sup>60</sup>

**American Commercial Lines**, which owns **Jeffboat** at Jeffersonville, plans to invest \$17.5 million to expand its operation. Most of the investment will be at Jeffboat. It will receive \$11.3 million in state tax incentives. The company constructs and repairs **barges** and operates river

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terminals and other service facilities. It will build about 300 barges in 2006.<sup>61,62</sup> Jeffboat is the second largest barge builder in the United States. The company is manufacturing barges at its capacity, but is unable to meet current demand for barges.<sup>63</sup>

**Tell City Marine** has an option to reopen the abandoned **Maxon Marine** site to build barges.

An industry expert predicts that the need for barges will increase because of an increase in transport of coal and petroleum coke by the year 2010. In addition, more barges are currently being retired from old age than are currently being constructed.<sup>64</sup>

The **U.S. Corps of Engineers** conducted a 10-year study that indicates many repairs and replacements need to be completed on the **lock system along the Ohio River**. The first 20 years of the Corp's 60-year plan would cost \$2.5 billion, and no source of funding currently exists.

Work to replace the **McAlpine Lock** at Louisville has been ongoing for some time with completion estimated for 2009. When complete, that project will have cost about \$420 million.<sup>65,66</sup>

**Indiana Rail Road** completed its purchase of 92.3 miles of track in Vigo and Lawrence Counties by taking ownership of the Latta Subdivision of the **Canadian Pacific Railway**. It was renamed the Chicago Subdivision and connects with existing lines to Chicago, Louisville, and Ohio River ports.<sup>67</sup>

To increase its capacity to haul steel, the **Chicago SouthShore & South Bend Railroad** is

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purchasing 100 new gondola cars at a cost of about \$8 million. The cars will be equipped to carry steel coils.<sup>68</sup>

## **Environmental issues**

Twelve sites are under consideration for the DOE-sponsored **FutureGen power plant** that will sequester carbon underground. Indiana is partnering with Illinois which has four sites under consideration.<sup>69,70</sup>

Two **scrubbers** will be installed at the **Indiana-Kentucky Electric Corp.'s Clifty Creek** coal-fired electric power plant located at Madison. The scrubbers will treat emissions from all six units and should be in operation by 2010.<sup>71</sup>

**Vectren** plans to have **scrubbers** installed on all of its coal-fired plants by 2010. The company reports that since 1970, **sulfur dioxide emissions** have decreased by 90 percent and **nitrogen oxide emissions** have decreased by 80 percent at its **A. B. Brown** plant in Posey County. The company is also working to reduce mercury emissions by 65 percent before 2010.<sup>72</sup>

Although building **integrated gasification combined cycle (IGCC)** power plants is being encouraged by federal incentives and is an effective way for some companies to meet federal clean air requirements, a challenge faced by companies interested in building them is that the technology is so new that many investment companies consider it a credit risk. Therefore, funding is difficult

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to achieve.<sup>73,74,75</sup>

**Carbon dioxide emissions** from burning fossil fuels increased by only 1 percent during 2005 when compared to 2004, reaching 5,909 million metric tons during 2005. Energy demand decreased during 2005, primarily because of **high oil and gas prices**. The price for gasoline increased by 19 percent and residential natural gas increased by 16 percent, when corrected for inflation.<sup>76</sup>

**Methane** from a landfill in Clark County may help to fuel an electric power plant. **Hoosier Energy** is requesting approval for a study, and if successful, the energy will enter the system through **Clark County REMC**.<sup>77</sup>

### **Construction industry developments**

The **federal government gave final approval for the U.S. 31 upgrade in** St. Joseph and Marshall Counties. The project will cost more than \$1 billion.<sup>78</sup>

A rural area recently annexed into **Westfield** in Hamilton County may see development with the addition of 1,125 houses, multiple-unit housing, retail, and other related construction on 236 acres. A number of subdivisions are experiencing growth in the Indianapolis area.<sup>79</sup>

A \$42 million expansion project was begun at **St. Francis Hospital** at Mooresville in May.<sup>80</sup>

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A \$25 million, 100-unit **condominium development** will be built in Indianapolis neighboring the Lockerbie Square neighborhood.<sup>81</sup>

The **Indiana Constructors, Inc., and Associated General Contractors merged** to form the **Indiana Construction Association** to better handle membership services and deal with political issues facing the construction industry.<sup>82</sup>

**Honda Corp.** selected a site near Greensburg in Decatur County to build a large auto manufacturing plant.<sup>83</sup>

Development began on the **1,000-acre technology park** near the west gate of Crane Naval Surface Warfare Center in Daviess County.<sup>84</sup>

A **new high school for Charlestown** may be built at an estimated cost of \$75.8 to \$79.5 million.<sup>85</sup>

A groundbreaking ceremony was held for the **Ohio River Bridges Project** at Jeffersonville.<sup>86</sup>

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## Legislation and regulatory issues

In response to recent mine tragedies, the **Mine Improvement and New Emergency Response (MINER) Act** was signed into law by **President Bush** in June. The law contains a number of requirements to improve mine safety, increases civil penalties for violations, and takes effect immediately. It also provides for a scholarship program to train future miners.<sup>87,88</sup> The **U.S. Mine Safety and Health Administration (MSHA)** approved use of two **portable radios** in underground mines, to improve communication.<sup>89</sup> **MSHA** may receive an additional \$25.6 million in federal funds to hire and train 217 more mine safety inspectors, and the **National Institute for Occupational Safety and Health** may receive \$10 million for mine safety research projects.<sup>90</sup>

A bill that would encourage research on coal-to-liquids was introduced in the Senate as the **Coal-to-Liquid (CTL) Fuel Promotion Act of 2006**. Included in the legislation are tax incentives for plant construction.<sup>91</sup>

Energy companies caught participating in **price gouging** could face criminal prosecution and fines up to \$150 million according to legislation approved by the **U.S. House of Representatives**.<sup>92</sup>

Several **synfuel** plants stopped operation because of concerns that they would lose tax credits owing to the high price of oil. The tax credits are contingent on the price of oil during the previous year.<sup>93</sup> Legislation to strengthen the tax credits was being worked on.<sup>94</sup>

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The **National Infrastructure Improvement Act of 2006** was introduced into the U.S. Senate.

The legislation would require the federal government to conduct a nationwide, comprehensive study of infrastructure. This is deemed necessary both because of damage caused by recent natural disasters, and because there is an unfunded mandate of \$1.2 billion in **U.S. Army Corps of Engineers** projects.<sup>95</sup>

Federal legislation was introduced that would allow states more control over **federal transportation funds** by distributing federal funds to the states through block grants beginning in 2010, following expiration of the current federal transportation bill.<sup>96</sup>

The **U.S. Supreme Court** issued a decision in a long-contested wetlands case concerning two properties in Michigan, redefining the use of the term “wetlands” and lessening control by the **U.S. Corps of Engineers** over wetlands that are not navigable.<sup>97</sup>

The **USGS’s Mineral Resources Program** is facing a possible cut of their budget by about 42 percent for fiscal year 2007.<sup>98</sup>

A final rule tightening requirements for control of **diesel particulate matter** was published by **MSHA** in May.<sup>99</sup>

In 2005 the state of Indiana took detailed **aerial photos** of the entire state. They can be viewed at

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<<http://www.indianamap.org>>.<sup>100</sup> The images are also available for viewing on Google Maps <<http://www.maps.google.com>> and the Indiana Geological Survey Web site <<http://igs.indiana.edu/>>.

Indiana's **Major Moves program** budgets \$826 million for fiscal year 2007 for highway and bridge projects in Indiana. The annual spending on transportation projects should reach about \$1.5 billion by 2015, which will be nearly double the amount spent in year 2014. Of that amount, new road construction is expected to reach \$874 million in fiscal year 2015. That amount is four times the amount being spent on new road construction in the fiscal year ending in June 2006.<sup>101</sup> A contract was signed to **lease the Indiana toll road** to a privately owned company and it became effective with the transfer of \$3.8 billion from the private company to the state on June 30.<sup>102</sup> Two lawsuits were filed challenging the constitutionality of the deal by a consumer action group and a political candidate, but the Indiana Supreme Court ruled that the lease was not unconstitutional.<sup>103,104</sup> **Governor Daniels** provided information about the program to the U.S. Highways, Transit and Pipelines Subcommittee of the **House Transportation and Infrastructure Committee**.<sup>105,106</sup>

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## Metals

**Arcelor SA accepted Mittal Steel Corp.’s** merger offer. The new company will be named **Arcelor-Mittal** and will be the world’s largest steel producer having about 10 percent of total world production; it will also be three times larger than its closest competitor. The new company’s headquarters will be in Luxembourg.<sup>107,108</sup> A ladle fell, striking a pouring hook hoist and spilling 200 tons of molten iron at **Mittal Steel USA’s Indiana Harbor West** mill in East Chicago in April. The accident caused a 4-hour fire and a shutdown of the mill that lasted about a month for extensive cleanup and repair. Two employees were taken to the hospital, and released, one uninjured and the other with minor injuries. About 200,000 tons of steel production were lost owing to the shutdown.<sup>109,110,111,112</sup>

**U.S. Steel Corp.’s** \$300 million rebuild of **Blast Furnace No. 14** was completed in January and the furnace was restarted. The rebuilt furnace has a 9,200-ton daily molten iron production capacity which is 2,155 tons more than before the reconstruction.<sup>113</sup> The corporation received a tax abatement from **Portage** for a \$17.5 million mill upgrade that will allow the plant to produce high-strength steel suitable for the auto industry.<sup>114</sup>

**Steel Dynamics** completed its purchase of **Roanoke Electric Steel Corp.** The company now has five minimills producing a variety of products and an additional five fabrication facilities located in seven states.<sup>115</sup> Total steel production is estimated to reach 6 million tons by the close of 2007. Following the merger of the two companies, **Pittsboro’s SBQ Bar Products Division** will be

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known as the **Engineered Bar Products Division**; construction of the SBQ finishing facility at Pittsboro was completed.<sup>116</sup> A new \$200 million mill will be built at **Steel Dynamics Columbia** mill site, with construction to be completed by mid-2007. With the addition of the new mill, some of the current beam production that is done at the existing plant will move to the new plant, allowing the existing mill to make **railroad rail**. Additional beam products will also be made at the new mill. The company has also formed a joint venture with another company to produce composite rail ties in a separate facility at Steel Dynamic's Columbia operation. The composite tie will have a steel core filled with concrete; the tie will be coated by a synthetic material composed of recycled rubber and plastic.<sup>117</sup>

Construction of a new **hydrogen plant by ForeverGreen** at Butler has been delayed because of financial reasons. It is still acquiring needed permits.<sup>118</sup>

**Nucor Corp.** set company records for steel production, shipments, and sales to outside customers during the first quarter of the year, with all segments showing increases from 12 to 13 percent when compared to the same period of 2005. Nucor Corp., headquartered in Charlotte, N.C., is acquiring **Connecticut Steel Corp.**, a bar products mill located in Wallingford, Conn.<sup>119</sup> Nucor Corp. operates a minimill at Crawfordsville in Montgomery County.

**Steel Technologies**, based in Louisville, Ky., acquired **Kasle Metal Processing** located in Jeffersonville, Ind., along with Kasle Steel Corp. plants located in other states. Kasle Metal

Processing makes automobile parts.<sup>120</sup>

Indiana steel companies will likely supply steel to the new **Honda Corp.** automobile plant announced for Decatur County.<sup>121</sup>

Union workers at **Alcoa, Inc.**, ratified a new 4-year contract.<sup>122</sup>

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