

# Indiana Mineral Industry News

## First Quarter 2001

By Kathryn R. Shaffer  
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### Production

Year 2000 Preliminary Indiana nonfuel mineral production figures were received from the US Geological Survey (USGS). According to these figures, total industrial minerals production was valued at \$729 million. About 60 Mt (66.1 million st) of crushed stone (\$282 million), 28.5 Mt (31.4 million st) of construction sand and gravel (\$124 million), 2.5 Mt (2.8 million st) of portland cement (\$175 million), 752 kt (829 thousand st) of common clay (\$1.4 million), 230 kt (254 thousand st) of dimension limestone (\$33.6 million), and undisclosed quantities of gypsum, industrial sand, lime, masonry cement, peat, and freshwater pearls (\$113 million), were produced in Indiana during the year. When compared to year 2000 production, crushed stone showed a decrease of 3.5%, construction sand and gravel an increase of 7.5%, portland cement a 2.3% decrease, common clay a 9.9% increase, and dimension limestone a 3.1% increase. The undistributed category experienced a 10.6% increase in value when compared to 1999.<sup>1</sup>

Nationally, the USGS reports preliminary crushed stone production of 1.56 billion metric tons (1.72 billion short tons) during 2000, an increase of 1.3% over 1999, and preliminary construction sand and gravel production of 1.16 billion metric tons (1.29 billion short tons), an increase of 4.5% over 1999. Indiana's production of 14.7 Mt (16.2 million st) of crushed stone and 6.3 Mt (6.9 million st) of construction sand and gravel during the fourth quarter of 2000 reflected decreases of 4.0 and 1.2, respectively, from 1999.<sup>2</sup>

The Gypsum Association reports that the gypsum industry in the U.S. experienced a small (3.2%) decrease in production of wallboard during 2000 compared to 1999. A total of 28.2 billion sq. ft. of wallboard were shipped in the U.S. during 2001.<sup>3</sup>

According to preliminary Mine Safety and Health Administration data, approximately 3,807 persons were employed during 2000 in the Indiana nonfuel producing sector.<sup>4</sup> MSHA also reports that nationwide, 47 miners died in metal and nonmetal mines in 2000.<sup>5</sup>

### Industry and government news

Mulzer Crushed Stone asked to have 200 acres that they own and have been using for their stone crushing operation near Mauckport rezoned for commercial use. State law does not require that the property, which is on farmland, be rezoned.<sup>6</sup>

Rogers Group may have to pay a \$101,750 fine by the Environmental Protection Agency for

violating clean air regulations regarding dust for the Oard Rd. quarry. Rogers Group has 30 days to respond and request a hearing.<sup>7</sup>

Two articles appeared in the newspaper about Junction Limestone quarry and their efforts to get along with their neighbors.<sup>8,9</sup>

An article appeared in Rock Products about Mulzer Crushed Stone and wheel loaders that the company uses.<sup>10</sup> Another article appeared in the trade journal about Sellersburg Stone and equipment that they use in reclaiming fines.<sup>11</sup>

Financial results for Oglebay Norton Co. will now be simplified under three categories: Great Lakes Minerals, Global Stone, and Performance Minerals. The reorganization was announced due to several acquisitions and divestitures last year. The company, under Global Stone, acquired J. M. Huber Corp. at Portage last year.<sup>12</sup>

Bruce Mason, Executive Director of the Indiana Mineral Aggregates Association, was named 2000 AggMan Professional of the Year by Aggregates Manager journal.<sup>13</sup>

An article about the USGS National Atlas of the United States written by Valentin Tepordei, crushed stone commodity specialist for the USGS, appeared in the February issue of Rock Products. New additions to the Atlas include information about aggregate producers in the U.S. The National Atlas can be accessed at: <http://www.nationalatlas.gov>. Layers from the Atlas may be downloaded from the website for use in GIS applications.<sup>14</sup>

The Rock Mechanics and Explosives Research Center at the University of Missouri -- Rolla, received a \$1.5 million contract from the Crane Naval Surface Warfare Center to improve on abrasive waterjet technology.<sup>15</sup>

Martin Marietta applied for a zoning variance on property to expand their sand and gravel operation near Carmel, but is facing opposition from local homeowners.<sup>16</sup> A judge ruled that the operation will need to file for a special permit because it is in the Carmel urban area.<sup>17</sup> Morgan County gravel producers will negotiate with county commissioners on ways they can help make county road improvements on Madison Township roads traveled by gravel trucks.<sup>18,19</sup> A Hancock County zoning appeals board gave approval for a new gravel operation on a farm along CR 400 N, 0.5 mi. east of SR 9.<sup>20</sup>

Southdown, Inc., which is building a \$5 million cement redistribution facility at Southwind Maritime Centre near Mt. Vernon is being acquired by Cemex, S.A. de C.V. Product will be brought into the state by barge and redistributed in Indiana.<sup>21,22</sup>

An article about Lone Star Industries, Inc.'s, Greencastle plant expansion, completed last year, appeared in the January issue of Mining Engineering.<sup>23</sup>

The Portland Cement Association projects total U.S. cement production to be 106.9 million tons in 2001 and to reach 114.3 million tons by 2004 due to projected continued high levels of construction, following a slight dip during 2001.<sup>24</sup>

### **Construction industry developments**

The American Road Transportation Builders Association is projecting an increase in US highway construction for 2001 due to increased federal appropriations for highways which totaled more than \$30 billion.<sup>25</sup> In Indiana, funds for highway construction should continue at high levels through 2001, but could experience a decrease in following years as funds from the Crossroad 2000 spending program run out. Approximately \$737 million is budgeted for Indiana highways for 2001, but funding may drop to between \$650 to \$700 million in the next two years.<sup>26,27</sup> State legislation that could have provided extra funds by raising gasoline taxes did not pass.<sup>28,29,30</sup> Also proposed is a moratorium on new construction on state facilities including state colleges and universities.<sup>31,32</sup> Other proposed state legislation would redefine passenger vehicles to include pickup trucks, a change that would alter the amount that several counties could receive in state highway funds.<sup>33,34</sup>

A report issued by Purdue University states that about 30% of Indiana bridges maintained by counties are in need of either repair or replacement. Counties do not receive the same level of funding as state projects do.<sup>35,36</sup>

An old railroad bridge at Jeffersonville crossing the Ohio River to Louisville, Ky., may be turned into a pedestrian walkway with other related development including a hotel, convention center, housing, and office space on the Jeffersonville side of the river.<sup>37</sup>

The Indiana Department of Transportation is expecting to see more potholes than usual develop this season due to the harsh winter weather. Four million dollars are budgeted to repair them.<sup>38</sup>

Increased landing fees and rental rates along with a tentative agreement with airlines on a long-term lease should fund much of the cost for a new planned \$890 million airport terminal at the Indianapolis International Airport. However, completion of the project has been pushed back at least two years to 2007 to allow airline companies more time to come up with the needed funds.<sup>39,40</sup> A new road will connect S.R. 67 from south of the airport across I-70 directly into the airport.<sup>41,42</sup> State political leaders are pressing for funds to improve the Gary airport to help relieve some of the congestion at Chicago's two airports.<sup>43</sup>

Construction continues on the new \$105 million State Museum, due for completion by spring 2002.<sup>44</sup> The museum has received half of the funding needed to complete the \$40 million facility.<sup>45</sup>

Although the economy has been experiencing a slowdown, sales of Toyota vehicles experienced record sales last year and plans for an \$800 million expansion at the Princeton Toyota Plant will

probably not be affected.<sup>46</sup>

Eli Lilly and Co. announced that they will make expansions to three buildings in their Indianapolis complex at a total cost of \$55.5 million. The company will also start construction, totaling \$35 million, on two new buildings in Indianapolis in the spring.<sup>47</sup>

GSA Investment Co., Inc., purchased the Junior Achievement Headquarters building and neighboring lot in Indianapolis for \$1.1 million. The Junior Achievement building will remain as is, but new development, perhaps a hotel, office building, or retail space, will be built on the adjacent parking lot.<sup>48</sup>

A total of \$704,675 will be used to renovate baseball fields at Memorial Park in Jeffersonville.<sup>49</sup> A \$140,000 Hometown Indiana Grant was awarded by the state to develop the Flatwoods County Park west of Ellettsville.<sup>50</sup>

### **Environmental and regulatory issues**

Some federal environmental rules signed by President Clinton will be examined by President Bush appointees. President Bush ordered a 60-day delay in the implementation of new rules.<sup>51,52</sup> Many were signed in the final days of the Clinton Administration. Included in the delay is the EPA clarification of the Tulloch rule regarding dredging of material.<sup>53,54,55,56</sup>

The combined National Aggregates Association-National Stone Association filed a petition challenging the new MSHA Hazard Communication rule.<sup>57</sup> MSHA also finalized a rule on the use of diesels in underground mines and plans to propose five more rules this year.<sup>58,59</sup> Other industry groups are also challenging OSHA's ergonomics rule.<sup>60</sup>

### **Metals**

MC Aluminum, a smelter in Columbus, experienced an explosion in February causing \$30,000 in damages. Two employees were injured also.<sup>61</sup>

U.S. Census Bureau data reveals that total imports of steel during 2000 were at the second highest level ever recorded. Imports of steel reached 37.8 million net tons. This figure is 8.9% lower than the highest level, reached in 1998.<sup>62</sup>

LTV Steel Corp. worked out arrangements with a bankruptcy Court and bank lenders to allow it to keep operating for the time being. The company also applied for an emergency guaranteed federal loan established under its Emergency Steel Guarantee Loan Program.<sup>63</sup>

Heartland Steel in Terre Haute also filed for Chapter 11 protection and Qualitech Steel in Pittsboro announced that the plant would close until a buyer could be found.<sup>64</sup> An investment bank was hired to find a buyer.<sup>65</sup>

Bethlehem Steel Corp. will pay less in taxes this year (\$30 million) because of a dispute with the State Board of Tax Commissioners over the value of equipment and machines. This is due to state laws on disputed property tax values. The company maintains that the reduced market for steel adversely affects their value.<sup>66</sup> The company is trying to renegotiate loan terms, but expects to be alright this year.<sup>67</sup> The company's Burn's Harbor plant experienced an explosion and fire during coke line repairs in February. Work continued at most of the mill.<sup>68, 69</sup> A fire also occurred at Ispat Inlands mill at East Chicago.<sup>70</sup>

To prevent another steel crisis, the American Iron and Steel Institute released a proposed trade program.<sup>71</sup>

Nucor Corp. at Crawfordsville, and Steel Dynamics, Inc., at Ft. Wayne experienced record earnings last year.<sup>72</sup>

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# Indiana Mineral Industry News

## Second Quarter 2001

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### Production

Indiana's production of 9.3 Mt (10.3 million st) of crushed stone and 5.9 Mt (6.5 million st) of construction sand and gravel during the first quarter of 2001 reflects an increase of 1.9 percent and a decrease of less than 1 percent, respectively, from the same quarter of 2000.<sup>1</sup> Growth is expected in the aggregates industry this year in spite of the slowdown in the overall economy.<sup>2In</sup>

### Industry news

Martin Marietta Aggregates has acquired all of J. W. Jones, Inc., plants. This includes the sand and gravel pit at Waverly in Morgan County, the crushed stone quarry at Gosport in Owen County and a new crushed stone quarry at Cloverdale in Putnam County. None of the plants acquired will be closed. Martin Marietta will also reopen the old Standard Materials Corp. quarry at Waldron. They will produce sand and gravel from the site and then develop the quarry when the sand and gravel is stripped off.<sup>3</sup>

Nationally, the USG Corporation filed for Chapter 11 bankruptcy protection in June due to costs associated with asbestos-related legal settlements. This status is expected to last for at least one year.<sup>4,5</sup>

The KPT tile factory at Bloomfield closed due to increased competition and decreased profitability of the plant.<sup>6</sup>

A meeting was held in Hendricksville in April with State Representative Peggy Welch, concerned citizens, and Junction Limestone, Inc. to discuss concerns about the quarry.<sup>7</sup>

The Rogers Co.'s Greene County Plant celebrated 36 years (10,000 days) without a lost-time accident or fatality, the second-best record in the nation.<sup>8</sup>

Cement companies Essroc Cement Corp., Lone Star Industries, Lafarge Corp., St. Lawrence Cement, and Holnam Inc. joined together to form the Slag Cement Association (SCA). The purpose of the new organization is to promote the use of slag cement and to differentiate it from slag used for other purposes.<sup>9</sup> Lone Star Industries Inc. won two awards in the 2000 Best Safe Practices Awards cosponsored by the Portland Cement Association, the American Portland Cement Alliance and the Cement Association of Canada.<sup>10</sup>

The annual Limestone Sculpture Symposium was held in June at the Bybee Stone Co. in Ellettsville.<sup>11</sup>

A photo exhibit on the construction of the Empire State Building was put on display at the Indiana State Museum in June.<sup>12</sup>

### **Construction industry developments**

A budget proposal was completed by the Bush Administration. The plan includes \$43 billion for transportation infrastructure. The Airport Improvement Program would receive an increase of \$100 million to \$3.3 billion and projects that fall under the Aviation Investment and Reform Act for the 21st Century would see an increase of 6 percent.<sup>13</sup>

The Indiana Department of Transportation planned highway construction projects estimated at \$735 million for the 2001 highway construction season, a record for the state.<sup>14</sup> Improvements to I-80 at \$23 million was the largest project initiated in northwestern Indiana.<sup>15</sup> South Bend will receive improvements to SR 331 at a cost of \$80 million.<sup>16</sup>

The list of 14 possible routes for the proposed I-69 extension should be pared down to 5 or less later this summer. Indiana is considered further ahead in its planning efforts than other affected states. It may take more than 20 years to complete the entire corridor.<sup>17</sup> A report containing a purpose and need statement was released on I-69 supporting the need for an interstate linking Indianapolis to Evansville.<sup>18</sup> Based on the report, some state officials believe that the "no build" alternative will eventually be discarded.<sup>19</sup> Public involvement meetings were held at Martinsville, Oakland City, and Sullivan.<sup>20</sup>

A \$6 million road to link Starlight, Ind. to Ind. 60 in Clark County is in its planning stages. The road would facilitate travel to area tourist attractions.<sup>21</sup>

Various options are under consideration for making improvements to U.S. 31 in Hamilton County.<sup>22</sup> Improvements to U.S. 31 through Kokomo in Howard County are also being studied.<sup>23</sup>

The state may receive \$6 million in federal funds to help with land acquisition and utility relocation for the two planned bridges spanning the Ohio River in the Louisville, Ky./Jeffersonville, Ind. region.<sup>24</sup> Evansville wants \$30 million in federal funds to cover planning for an I-69 route around the city and a bridge across the Ohio River.<sup>25</sup> The Gary region will also be able to apply for up to \$900,000 in federal funds to expand the Gary Chicago Airport which could help alleviate problems in the area.<sup>26</sup>

A \$100 million expansion is being planned for the Central Library in Indianapolis.<sup>27</sup>

Money was again being distributed from state Build Indiana funds following a revision of rules requiring more oversight over fund disbursement.<sup>28</sup>

## **Environmental and regulatory issues**

David Lauriski was appointed as head of the Mine Safety and Health Administration.<sup>29</sup> Linda J. Fisher was selected as Deputy Administrator of the EPA.<sup>30</sup> MSHA's budget is unchanged for 2002. However, 40 positions will be moved from Coal enforcement to Metal/Nonmetal enforcement to allow the agency to meet mandated inspections for those mines.<sup>31</sup> During inspections, MSHA has found many compliance problems with the Part 46 training regulation. About 60 percent of mines visited were not in full compliance.<sup>32,33</sup>

The U.S. Dept. of Labor postponed the date new federal underground diesel emission-control regulations go into effect.<sup>34</sup> And the U.S. Dept. of Transportation's new rule regarding commercial motor vehicles hours of service has been further delayed.<sup>35</sup>

The Tulloch's Rule went into effect on April 17. The National Stone, Sand & Gravel Association is taking the EPA and Army Corps of Engineers to court over the regulation.<sup>36,37,38,39</sup> The rule, a clarification of a part of the Clean Water Act, states that the EPA will regulate activities that take place in and near wetlands and will require the issuance of permits for those activities.<sup>40</sup>

The Indiana Water Pollution Control Board delayed a vote on whether or not to approve proposed revised ground-water rules drafted by the Indiana Department of Environmental Management. There has been much discussion about whether or not the rules should be strengthened.<sup>41,42</sup>

Worldwide, sales of new fluidized gas desulfurization systems installed at coal-fired electric power plants and producing byproduct gypsum are expected to double by the year 2006.<sup>43</sup>

A recycling team was created by the Federal Highway Administration to foster more use of recycled materials in highway construction.<sup>44</sup>

## **Metals**

In June, President Bush requested a four-month investigation into steel imports and asked U.S. officials to make agreements with other countries to prevent overproduction of steel and also to make new trade rules. Bankruptcy has been filed by 18 companies nationally since 1998 and 20,000 jobs have been lost due to the steel import situation.<sup>45</sup> Under NAFTA, Canada and Mexico could be excluded from any trade barriers.<sup>46</sup>

The U.S. Department of Commerce ruled that hot-rolled steel imports from four countries hurt sales from 20 American companies in 13 states, including Indiana. Fees will be collected from producers in India, Indonesia, South Africa, and Thailand and placed in an escrow account until the case is reviewed by the U.S. International Trade Commission later this year.<sup>47</sup> Some American companies reported significant losses in the first quarter of this year.<sup>48</sup> New federal guidelines were released in April for steel-frame building construction in earthquake-prone

regions of the country.<sup>49</sup> Bethlehem Steel will cut 140 management positions, may cut other positions, and has hired an efficiency expert.<sup>50</sup>

LTV Corp., operating under Chapter 11, tried to work out a union contract. An agreement needed to be reached before the company could qualify for a federal guaranteed emergency steel loan.<sup>51</sup> The company's Indiana Harbor Works may become the first integrated steel mill to receive ISO 14001 certification which entails meeting stringent international environmental standards.<sup>52</sup>

Two companies made bids to purchase Heartland Steel Inc. in Terre Haute which filed for bankruptcy in January. A federal judge determined that an unconditional cash offer of \$55 million from CSN, a Brazilian steel company, was the best bid. The company has until July 16 to complete the deal.<sup>53</sup>

USX will split its U.S. Steel Corp. and Marathon Oil into separately traded companies due to pressures from stockholders.<sup>54</sup>

Despite the downturn in the industry, demand for American steel has increased 40 percent since 1990.<sup>55</sup>

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# Indiana Mineral Industry News

## Third Quarter 2001

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### Industry news

According to Pentagon officials, it is likely that the Pentagon will be repaired with Indiana Limestone. The original building was constructed of stone supplied by the Indiana Limestone Company in Bedford.<sup>1</sup>

An article appeared in the September issue of North American Quarry News about a venture into the asphalt recycling business by Critser Companies.<sup>2</sup>

Mulzer Crushed Stone, Inc.'s Rockport Plant at Tell City, received a 2000 Sentinels of Safety Exceptional Safety Record award in the dredging category for 109,762 hours without a lost-time injury. The Sentinels of Safety Awards are sponsored by the U.S. Mine Safety and Health Administration (MSHA) and the National Mining Association.<sup>3,4</sup>

### Construction industry developments

The House approved a version of transportation funding for fiscal year 2002 that includes a budgeted amount of \$59.1 billion. The Senate version of the bill would provide \$59.96 billion. Each bill provides \$32 billion for the federal-aid highway program. There is some contention because both versions of the bill contain controversial provisions on regulating Mexican truck drivers for the stated purpose of ensuring highway safety.<sup>5,6,7</sup>

In July the Indiana Department of Transportation (INDOT) awarded \$18.3 million for 34 Transportation Enhancement Activity (TEA) awards. The federally funded projects are related to transportation, but are not highway projects. Projects include bicycle/pedestrian paths and trails, revitalization or construction of new commerce areas, and restoration of historic bridges and historic commerce areas.<sup>8</sup>

More than \$800,000 of federal monies was awarded by the Indiana Department of Natural Resources for projects to preserve historic properties in the state. Many of these projects will involve construction repair.<sup>9</sup>

INDOT conducted public meetings around the state in September to discuss present and future transportation plans for the state.<sup>10,11</sup> A draft of the Indiana Statewide Transportation Improvement Program (INSTIP) was discussed. INSTIP is a listing of plans for all federally funded transportation projects in the state and plans for the projects for the next three years. An

opportunity was also given for individuals to express their ideas about state transportation needs.<sup>12</sup>

INDOT began an environmental study for improvements to the Borman Expressway (I-80/94). Public hearings are planned for the summer of 2002 with final approval expected by the fall of that year.<sup>13</sup>

J. Bryan Nicol has been appointed as the new commissioner of INDOT following the resignation of Christine Klika. He has stated that the I-69 project is a top priority.<sup>14,15</sup> About \$5 million for an I-69 environmental study was approved as part of the Senate version of the federal transportation appropriations bill and went to a conference committee.<sup>16</sup> The Monroe County Ambulance Advisory Board passed a resolution favoring the inclusion of Bloomington on the I-69 extension because an interstate should decrease accident rates in the area and improve access to the Bloomington Hospital.<sup>17</sup> Citizens for Appropriate Rural Roads, Hoosier Environmental Council, and the Environmental Law and Policy Center released the report, "Untold Story," that claims that the INDOT purpose-and-need statement is biased and flawed.<sup>18</sup>

The Indiana Senate again stopped payments from the Build Indiana Fund in September; only urgent projects will continue to receive funds. The reason given this time was a shortfall of revenue to pay for the projects.<sup>19</sup> Also, cuts in state funding of more than one-half for county road repair will cause a reduction in those repairs.<sup>20</sup>

Subcommittees of the U.S. House Transportation and Infrastructure Committee conducted hearings on "procedural bottlenecks" that slow expansion and improvement of highways and airport construction projects to see if any procedures could be streamlined.<sup>21</sup> The Senate Commerce Committee approved legislation that would require the U.S. Department of Transportation to find ways to streamline the environmental review process for airport runway projects.<sup>22</sup>

INDOT announced plans for a \$70.6 million nine-mile highway through the Hoosier National Forest to improve access to Patoka Lake and French Lick.<sup>23</sup>

A new coalition called Americans for Transportation Mobility composed of members including the National Stone, Sand and Gravel Association, American Road and Transportation Builders Association, Association of American Railroads, and the U.S. Chamber of Commerce will lobby and support efforts that could result in improving the nation's transportation infrastructure.<sup>24</sup> Washington trips were planned for September, but canceled due to the events of September 11. They have tentatively been rescheduled for February 5 and 6.<sup>25,26,27</sup>

Purdue University announced plans for a 40-acre \$100 million research park to be called Discovery Park.<sup>28</sup> A Purdue doctoral student has developed a lightweight Portland cement mixture that cures at subfreezing temperatures, a development that could be useful to the construction industry.<sup>29</sup>

Schools in the Bloomfield School Districts are losing \$9 million in taxes due to the closing of the KPT ceramic tile plant earlier this year; therefore, property tax rates will increase for the district.<sup>30</sup>

## **Environmental and regulatory issues**

The U.S. Army Corps of Engineers may propose changes to its nationwide permit program following a year of experience with the program.<sup>31</sup> The agency is also conducting a study to develop a 60-year navigation plan for the Ohio River. Most of the 19 locks on the river are 40 to 50 years old, and some are older than that.<sup>32,33</sup>

Federal rules regulating diesel exhaust in underground metal and nonmetal mines went into effect in July.<sup>34</sup> Hanson Aggregates Midwest Region, Harding Street, is one of 31 aggregate mines selected by MSHA to monitor air quality for diesel particulate matter. Depending on results, which should be available early next year, industry will decide whether or not to pursue further litigation.<sup>35,36</sup>

The pending U.S. Environmental Protection Agency's Total Maximum Daily Load water pollution control program will probably be revised due to the high cost for compliance, estimated between \$1 billion to \$3.4 billion annually, primarily due to the need for installation of necessary equipment.<sup>37</sup> The Indiana Water Pollution Control Board in August approved ground water rules drafted by the Indiana Department of Environmental Management. The rules should go into effect within six months.<sup>38,39,40</sup>

A year-long moratorium on the listing of new endangered species by the U.S. Fish and Wildlife Service has ended. The purpose of the moratorium was to allow the agency time to improve the program. The National Association of Home Builders questions whether any improvements have been made in the system.<sup>41</sup>

The U.S. Senate confirmed David Lauriski as the new director of MSHA in May.<sup>42,43</sup> As part of MSHA's 2002 fiscal year appropriations request, MSHA has asked that \$3.7 million and 40 employees be transferred from coal to metal/nonmetal regulatory programs due primarily to the demands placed on the agency by the Part 46 training requirements and for the agency to better assist small metal/nonmetal mines with other compliance needs.<sup>44</sup> The HazCom rule which was scheduled to become effective on October 3 has been delayed until June 30, 2002. The rule requires mines to maintain information on hazardous materials used at the mine and to share this information with miners.<sup>45,46</sup>

Water levels in the Great Lakes continue to decline, causing problems for shippers. Loads of iron ore, coal, and limestone have had to be lightened resulting in more trips and higher costs. This is the fourth straight year for lowered water levels on the lakes.<sup>47</sup>

## Metals

USX Corp. proceeded with reorganization plans. Among the changes, a new holding company called United States Steel LLC was formed and a new publicly traded corporation called United States Steel Corp. will be launched in January.<sup>48</sup> Directors and financial executive officers were named for the new corporation. This is part of the separation of the Marathon Oil Company from the U.S. Steel Group that was announced last quarter.<sup>49,50</sup>

Bethlehem Steel Corp. reduced its non-represented salaried workforce by about 11 percent, approximately 300 positions, in August; the total reduction in Bethlehem's workforce is about 18 percent since 1999.<sup>51</sup> About 175 hourly represented employees at Indiana's Burns Harbor Division were informed they would be temporarily released in August.<sup>52,53</sup>

LTV Corp., operating under Chapter 11, approved a tentative union contract which allows the company to qualify for a \$250 million federal guaranteed emergency steel loan.<sup>54</sup> About 1,300 jobs will be cut, but the union will have 2 members on the corporation's board of directors, receive a 20 percent stake in the company, and workers would have a profit-sharing plan after Chapter 11 is completed.<sup>55,56</sup> The state awarded \$7.4 million in loans to the East Chicago area to compensate for lost property tax income due the LTV Corp.'s Chapter 11 filing and East Chicago schools are making cuts.<sup>57</sup> Three companies toured LTV Corp.'s plants in Indiana and Illinois in July fueling speculation that they might be interested in purchasing them.<sup>58</sup>

Repairs need to be made to the Ispat Inland plant, but the company is financially unable to do so.<sup>59</sup>

U.S. Steel Corp., Gary Works, plans to build a dewatering facility for environmental reasons.<sup>60</sup>

Qualitech Steel SBQ is still for sale. The plant has flow-control problems, but the company states that it has a plan for fixing them.<sup>61</sup>

In September, antidumping suits were filed against the cold-rolled steel product-producing countries Argentina, Australia, Belgium, Brazil, China, France, Germany, India, Japan, South Korea, The Netherlands, New Zealand, Russia, South Africa, Spain, Sweden, Taiwan, Thailand, Turkey, and Venezuela with countervailing duty suits against Argentina, Brazil, France, and South Korea by the United States steel-producing companies United States Steel LLC, Bethlehem Steel Corp., LTV Steel Company, and National Steel Corp.<sup>62</sup>

Several hearings were held by the International Trade Commission as part of an examination of whether or not an increase in foreign imports has damaged the United States steel industry. One of these hearings was held in Indiana.<sup>63</sup> Depending on the findings, more hearings may be held in November to determine how to remedy the problem with a vote on options scheduled for December 19.<sup>64</sup>

Companhia Siderurgica Nacional (CSN) completed the purchase of Heartland Steel Inc. in Terre Haute. The company has some concern for their future ability to bring steel into the country for processing at the plant due to restrictions that may be placed on them by the findings of the International Trade Commission, but may receive favored treatment if sanctions are imposed.<sup>65,66,67</sup>

An interesting article appeared in the the New York Times and was posted on the American Iron and Steel Institute's web site about recycling the material from the New York City Twin Towers tragedy.<sup>68</sup> The web site also has an article explaining why the steel in the buildings collapsed.<sup>69</sup>

Alcoa Inc. and Praxair Inc., Newburgh, received a Governor's Award for Excellence in Pollution Prevention, presented by the Indiana Department of Environmental Management, for developing a production method that reduces nitrogen oxides emissions by 50 percent, natural gas consumption by 45 percent and a waste metal generation by 85 percent.<sup>70</sup>

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# Indiana Mineral Industry News

## Fourth Quarter 2001

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### Production

According to data published by the U.S. Geological Survey during the third quarter of 2001, national production of crushed stone reached 485 million metric tons and production of construction sand and gravel reached 338 million metric tons, demonstrating a gain of 7.2% and decrease of 0.5%, respectively, when compared to the same period of 2000. Indiana with production of 18.3 million mt of crushed stone and 7.6 million mt during the third quarter experienced an increase of 1.5% and a decrease of 3.9%, respectively for the same time period.<sup>1</sup>

A report released by the Freedonia Group forecasts that nationally, gypsum prices are expected to decrease through 2005 leading to an anticipated increase in demand for products of about 1.8 percent or about 45.1 Mt (49.7 million st). While an anticipated decrease in the number of housing starts could lead to slower growth in the demand for wallboard, demand for gypsum for other uses such as additives and fillers is expected to increase and the demand for synthetic gypsum is expected to almost double from current levels.<sup>21</sup>

### Industry news

Independent Limestone Co. of Bloomington is producing stone for the Pentagon reconstruction project. About 18,000 cu. ft. will be produced for the job. Bybee Stone Co. of Ellettsville is cutting, detailing, and shipping the stone.<sup>3,4</sup> Most of the original stone came from the Indiana Limestone Co. in Lawrence County during the 1940's.<sup>5</sup> A memorial stone will be placed inside the structure, where it will be unseen, with a quotation inscribed from President Bush and signed in ink by stone workers. The outside reconstruction is expected to be completed or near completion by Memorial Day.<sup>6</sup> However, the entire reconstruction, including inside, could take three years to complete at a total cost of about \$750 million.<sup>7</sup> The construction on the original building began September 11, 1941, precisely 60 years before the terrorist attack on Sept. 11, 2001.<sup>8</sup>

Blackwell Moore, Inc. which produced crushed stone from overburden at the Indiana Limestone, Inc.'s Crown Quarry was acquired by Rogers Group Inc. who will continue to produce crushed stone there as the Bloomington Crown Quarry. Dimension limestone will also continue to be produced from the quarry.<sup>9</sup> Rogers Group Inc. also provided public water hookups for twelve Monroe County families who had problems with well water levels possibly related to blasting done at the Oard Rd. quarry in September.<sup>10,11</sup>

Purdy Materials will be allowed to continue mining gravel in the Lafayette area for the next 20 years following a decision by the Board of Zoning Appeals. Its current property has reserves to

last for another three years and then it will move to a nearby property.<sup>12</sup>

An underground fire due to a truck problem at one of Martin Marietta Aggregates underground mines in Indianapolis produced no injuries.<sup>13</sup>

William H. McDonald, former Executive Director of the Indiana Limestone Institute of America, Inc., died Oct. 7, 2001 at the age of 71.<sup>14</sup>

### **Construction industry developments**

A transportation-related stimulus package was considered as part of a larger federal economic stimulus package, but there is not enough support for it in the legislature at this time.<sup>15,16</sup> The transportation sector of the construction market seems to be the least affected by the current economic recession according to the American Road & Transportation Builders Association. The agency expects growth in the highway construction market of between 3 - 6 percent during 2002 due to continued high levels of federal funding. Gains are expected for airport and mass transit construction projects as well.<sup>17</sup>

The number of routes under consideration for the I-69 extension between Indianapolis and Evansville were narrowed from 14 to 5. A final route will be selected by late 2002.<sup>18</sup> Three public information meetings were scheduled for November.<sup>19</sup> Two environmental groups together ran a television ad in Evansville supporting the Interstate 70 to U.S. 41 route.<sup>20,21</sup> There is additional environmental controversy over where to take the bridge over the Ohio River at Evansville. A proposed national wildlife refuge lies across the river on the Kentucky side. It may take two years to decide on a site for the bridge. A website, <http://www.i69in-ky.com> was set up to provide information to the public on the process of deciding on routing of the interstate between Indiana and Kentucky. Two public meetings, one in Evansville and one in Henderson, Ky., were held in November to discuss the project's Purpose and Need Statement. This study is being conducted separately from the Indianapolis to Evansville study.<sup>22</sup>

A draft environmental impact statement evaluating nine sites for the Ohio River Bridges Project was released in November.<sup>23</sup> This project would place two new bridges across the Ohio River in the Jeffersonville/Clarksville, Ind., - Louisville, Ky. region. A recommendation on locations will be made sometime this year.<sup>24</sup> Public meetings to discuss the route possibilities were held.<sup>25</sup> The Ohio River Bridges Coalition was formed to support the project and to lobby for funds to build the two bridges. Two formal public hearings in Indiana and Kentucky are planned for February and comments on the report are being accepted until February 25.<sup>26</sup>

Jeffersonville will receive \$300,000 in federal grant money to help redevelop a historic property containing military buildings dating approximately to the Civil War era. The property could become a new city hall or apartment complex among other possibilities.<sup>27</sup>

Construction is proceeding on the \$55 million Natcher Bridge that is crossing the Ohio River at Rockport. The project is expected to be completed by July or August.<sup>28,29</sup>

A bridge crossing the Wabash River and connecting New Harmony, Ind., to Crossville, Ill., may eventually close. It is estimated to cost \$2.2 million to partially repair the aged bridge, while building a new one would cost between \$15 to \$20 million. The Indiana Department of Transportation believes that the bridge does not carry enough traffic to warrant the cost of repair or replacement.<sup>30</sup> The state of Illinois is providing \$120,000 to repair the bridge and keep it open for another year.<sup>31,32</sup>

A \$252 million bypass is under discussion for Huntingburg. About 1,000 trucks pass through the town daily.<sup>33</sup>

A \$50 million dike system was completed in Ft. Wayne to prevent flooding from the three rivers that join there.<sup>34</sup>

The Federal Highway Administration has approved a 10-mile \$70 million plan for S.R. 145 new highway construction in Perry and Crawford Counties.<sup>35</sup> The federal agency has also approved improving SR 331 to a six-lane expressway. The Mishawaka area project will cost \$90 million.<sup>36</sup>

About \$737 million was spent on highway construction in Indiana during 2001, the largest amount ever, with another \$690 million budgeted for 2002.<sup>37</sup>

The \$390 million Gary-Chicago Airport expansion project received federal approval.<sup>38</sup> A nearby 374 acre wildlife preserve to protect the endangered Indiana Bat will be created prior to constructing a new access road, and other projects, at the Indianapolis International Airport which will be enlarged. Plans call for planting 346 acres with trees.<sup>39</sup>

Many new businesses have recently been, or soon will be, built along 96<sup>th</sup> street in Indianapolis.<sup>40</sup> Along with the development has come problems of traffic congestion. Several proposals for improvements to the Keystone/96th are under discussion including lane improvements and the possibility of adding an overpass on Keystone Ave.<sup>41</sup>

A Washington information-gathering trip planned by a new coalition called Americans for Transportation Mobility composed of members including the National Stone, Sand and Gravel Association, American Road & Transportation Builders Association, Association of American Railroads and the U.S. Chamber of Commerce planned for September was rescheduled for February 2-5 and 6. The group will lobby and support efforts that could result in improving the nation's transportation infrastructure.<sup>42</sup>

### **Environmental and regulatory issues**

New standards for using slag in road construction are being considered following the leaching of an unpleasant-smelling fluid from I-65 in Lake County following repairs and improvements that had used slag as fill material.<sup>43,44</sup>

Public meetings were held during November to discuss possible changes to the proposed MSHA hazard communication (HazCom) rule discussed in the last report.<sup>45</sup> Public meeting were also

held to discuss the EPA's rewriting of the Total Maximum Daily Load rule. Modifications to the program may be made in mid 2002, based on the meetings.<sup>46</sup>

## Metals

Bethlehem Steel Corp., Burns Harbor, Inc., filed for Chapter 11 bankruptcy protection in October.<sup>47</sup> Primary reasons given were negatives effects on the market due to high levels of steel imports, high costs of employee retirement programs, and high labor costs.<sup>48</sup> They also blamed a fall in the market following the September 11 tragedy.<sup>49</sup> This is the fifth steel producer with mills in the state to file bankruptcy. The others are: Heartland Steel at Terre Haute, Qualitech Steel SBQ at Pittsboro, LTV Corp. at East Chicago, and Republic Technologies International LLC at Gary.<sup>50</sup> Burns Harbor could face a significant shortfall in tax income as a result of the bankruptcy.<sup>51</sup> Because of this problem, Porter County will receive \$3 million in state loans and \$6.3 million advanced school system tuition payments; however, the total additional shortfall will be about \$21 million.<sup>52,53</sup>

LTV Corp. has petitioned a U.S. Bankruptcy Court for permission to cease operations so that they are better prepared to sell the company.<sup>54,55</sup> Ispat Inland, and other East Chicago taxpayers, may find their taxes increased to offset the loss of taxes caused by the LTV Corp. closure.<sup>56</sup> The company received approval in December resulting in a layoff of 2,000 steel workers. The company must keep the mills in working order until February 28. The company will continue to attempt to acquire \$250 million in federal guaranteed emergency loans or a buyer.<sup>57</sup> Indiana Workforce Development Services reported that this is the largest closure, occurring at one time, in the state's history.<sup>58</sup> Bethlehem Steel and U.S. Steel are absorbing most of LTV Corp.'s customers. The two companies are planning to raise steel prices because of the closing and because of declining foreign imports. Prices are expected to increase from 7 to 9 percent.<sup>59</sup>

A loss of \$23 million was reported by U.S. Steel during the third quarter with low profits projected for the fourth quarter.<sup>60,61</sup> To save costs, the company is discussing a merger with Bethlehem Steel, Wheeling-Pittsburgh Steel, a fourth unnamed company, and additional unnamed partners. The companies state that such a merger would require job cuts and government assistance with retiree health and pension costs.<sup>62</sup> The merger would create a company capable of producing 30 million tons per year, almost double U.S. Steel's current production of 17 million tons.<sup>63</sup> Antitrust issues are not likely to be a factor as the new company would most likely produce less than 25 percent of the nation's steel.<sup>64</sup> Three European steel companies are merging as well to form the world's largest steel company.<sup>65</sup>

The retiree costs hinder American companies in their competition with foreign companies, many recently privatized from state-run enterprises, who do not have the burden of those expenses.<sup>66</sup> These costs are also considered by analysts to be a significant factor in LTV Corp.'s financial problems.<sup>67</sup> The large health and pension plan encumbrance make the company less attractive for purchase by other companies. Some of these costs will be assumed by the federal government, but not at the level provided by the company.<sup>68</sup>

An expansion project at Eagle Steel Products, Inc., that includes a new building and equipment

will receive funding for the project through the sale of \$7.75 million in tax-free bonds, approved in October by the Jeffersonville City Council.<sup>69</sup> There is a potential buyer for the Qualitech Steel minimill at Pittsboro.<sup>70</sup>

An International Trade Commission panel completed a study which concluded that the American steel industry had been damaged by cheap foreign imports.<sup>71,72,73</sup> The Commission recommended that President Bush impose tariffs and quotas of up to 40 percent on foreign steel imports.<sup>74,75,76</sup> A two-day meeting of 39 steel-producing countries sponsored by the Organization for Economic Cooperation and Development convened in Paris in December. Twenty-six countries released forecasts of production including cuts totaling about 100 million tons of steel a year. The countries agreed to cut production by about 10% over the next decade. President Bush is to decide whether or not to impose tariffs by late February.<sup>77</sup>

The national recession is expected to hit the steel industries in Lake and Porter Counties in northern Indiana especially hard.<sup>78</sup>

Worldwide, five Alcoa, Inc., plants will close and 6,500 jobs will be cut largely due to recent acquisitions, including that of the Reynolds Metals Co. in 2000.<sup>79,80</sup>

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