

Indiana Mineral Industry News

1st Quarter 2003

By Kathryn R. Shaffer
Indiana Geological Survey

Production

Indiana coal production through the week ended March 29, 2003 was 8.3 million short tons, a 9.2 percent decrease from the same period of the previous year according to the U.S. Department of Energy, Energy Information Administration (EIA). Indiana ranked seventh nationally as of this time period.¹

According to data published by the U.S. Geological Survey (USGS) for the fourth quarter of 2002, the most current data available, Indiana production of crushed stone was 14.2 million mt and Indiana production of construction sand and gravel was 6.5 million mt demonstrating a decrease of 3.3 percent and an increase of 2.7 percent, respectively, when compared to the same period of 2001.²

Indiana produced 35.5 million short tons of coal during 2002, ranking the state seventh nationally.³

Very preliminary figures were released by the USGS for industrial mineral production during 2002. The release also contained some revised production figures for 2001 (table 1).⁴

Commodity	2001		2002		Percent change (2001 - 2002)	
	Quantity (thousand st)	Value (thousands)	Quantity (thousand st)	Value (thousands)	Quantity	Value
Portland cement	3,197	\$195,000	3,417	\$208,000	6.9	6.7
Common clay and shale	634	1,470	411	775	-35.1	-47.3
Gem stones	NA	3	NA	4	NA	33.3
Construction sand & gravel	31,967	124,000	30,424	120,000	-4.8	-3.2
Crushed stone	64,154	278,000	63,052	278,000	-1.7	0.0
Dimension stone	203	35,300	230	32,400	13.6	-8.2

Undistributed (includes gypsum, industrial sand, lime, masonry cement, peat)	NA	104,000	NA	100,500	NA	-3.4
Total Nonfuel	NA	\$737,773	NA	\$739,679	NA	0.3
NA = Will not be available						

Cement consumption is expected to fall somewhat in 2003, but during the following three years should show improvement.⁵ Total U.S. consumption may fall to 107.4 million mt in 2003, a 1.2 percent decrease from 2002 levels.⁶

Gypsum wallboard shipments experienced their highest levels ever in 2002 with 29.87 billion square feet shipped, according to the Gypsum Association.⁷

Industry news

Peabody Energy was considering purchasing the remaining 18.3 percent of Black Beauty Coal Company.⁸

Horizon Natural Resources, Beech Coal Co. plans to shut down its Knox County Sycamore Mine and prep plant.^{9,10} The plant will be in idle status and about 60 employees will be affected. The shutdowns are a result of bankruptcy proceedings.¹¹ The company asked for more time to reorganize.¹²

Vectren Fuels completed a rail spur to the Prosperity Mine in Pike County. It had been receiving coal from the mine by truck.¹³

Orion Energy of Oakland, California, wishes to install a tower to test wind velocity for a possible wind farm to produce energy in Clinton County.¹⁴

Indiana Limestone Company was purchased in January by Johnson Ventures which is based in Columbus, Indiana.¹⁵ An article appeared in Rock Products about the dimension limestone industry and the Indiana Limestone Company was extensively covered in the article. It examined the economics of dimension limestone versus crushed limestone, the mining process, and prominent recent projects.¹⁶

Family members associated with the Victor Oolitic Stone Co. are opening a quarry on 350 acres in the Stinesville area that will be called the Big Creek Stone Quarry. The quarry may be opened by May or June. The Hoosier Calcium Corp. mine was purchased last August, and will be reopened this year. It was purchased by American Limestone Inc.¹⁷

Due to the very cold weather this winter, more of the Great Lakes froze over than usual. All of Lakes Superior, Huron, and Erie were frozen, as well as larger than usual portions of Lakes Michigan and Ontario. This was expected to delay the start of the shipping season which has been negatively affected in recent years by low lake levels.¹⁸

A barge and towboat company that transports 40 million tons of coal and grain per year as well as 30 million of other freight on the Ohio River, American Commercial Lines, filed for bankruptcy on January 31. Jeffboat, a part of that Jeffersonville company, builds barges. The parent company expects the bankruptcy proceedings to last about a year¹⁹

Construction industry developments

Higher than expected home construction rates were experienced during 2002. More than 1.7 million units were constructed during the year, which is the largest number of total housing units constructed in 16 years, and reflects the largest number of single-family dwellings constructed in 24 years.²⁰ Normal U.S. construction growth in 2003 is expected by some industry experts, although state financial problems may affect this. Recovery may not be noticeable until the second half of the year and results may be mixed among different sectors.^{21,22} Decreased state tax revenues are also having a negative effect on budget planning for transportation needs.²³

The Reason Public Policy Institute in Los Angeles published a study called “Toll Truckways: A New Path Toward Safer and More Efficient Freight Transportation,” which outlined a new vision for highways that would reportedly make highways safer and lead to more efficient transportation of products. The study suggests dedicated multi-lane truck lanes, separated from other lanes by concrete Jersey barriers in areas of high traffic and wherever else possible or feasible, and would be funded by tolls. The plan would also increase the weight allowed on trucks using these lanes, reducing the number of trucks on the highway. Congress has shown some interest in the plan.²⁴

Governor O’Bannon announced a 2,000 ft. wide corridor, designated as route 3-C, for the proposed \$1.7 billion I-69 extension between Indianapolis and Evansville. An exact route needs to be selected within that corridor, but the new highway will use S.R. 37 south of Indianapolis to Bloomington and then use a combination of existing roads and new terrain to complete the route to Evansville.²⁵ When construction begins it could take from 8 to 14 years to complete the highway with 80 percent of the cost expected to come from federal funding and the remaining 20 percent from the state.²⁶ The Governor stated that he chose a route that would maximize economic benefits to southern Indiana. An environmental impact statement is expected to be completed by mid to late 2003.²⁷ Federal Highway Administration approval is expected later this year.^{28,29} If approved, the state has \$55 million in federal funds available to proceed with detailed environmental studies to select a final route and to begin designing the highway. For that phase of the work, the corridor would be divided into six sections.^{30,31} There are many steps yet to be completed before construction can begin and there is much opposition to the proposed route.^{32,33,34,35,36} However, various polls show a nearly even split in public opinion.³⁷

The state plans to complete the final portion of the four-lane Indiana Heartland Highway with a \$220 million extension that will connect Lafayette and Logansport. The entire highway will run between Lafayette and Fort Wayne.³⁸

A stretch of I-65/I-70 east of Indianapolis will be closed for \$28 million in repairs between May 26 and August 18 with traffic diverted to I-465 which is scheduled for no repairs this summer. A project web site was established at <http://www.hyperfix6570.in.gov>.³⁹

Work is planned this summer in the Clarksville area on a 10-mile stretch of I-65 that is part of the "Revive 65" project. In July, the U.S. 31 and Charlestown-New Albany Pike intersection will be closed for 28 days as part of this project. It is expected that work will be done there before the end of November.⁴⁰

An S.R. 37 bypass around the town of Paoli to connect to U.S. 150 is under consideration.⁴¹

About \$31.5 million in improvements to I-465 at 56th St. and Shadeland Ave. are being made as part of a two-year project. Work includes the replacement of two bridges and interchange improvements.

This may be a record year for potholes due to the weather of last winter which should lead to much repaving, if funds are available.⁴² The City of Indianapolis will spend an estimated \$2.39 million to repair potholes this year.⁴³

Plans for a \$40 million student athletic center at Indiana University's Bloomington campus have been put on hold while priorities are being reevaluated.⁴⁴ A four to five story, \$40 million computing and information technology building is being planned for the IU Bloomington Campus. The state also gave permission for the university to sell \$30 million in bonds to help finance a new planned multidisciplinary science building. The building will also need an anticipated \$20 million in privately-raised funds.⁴⁵

A \$42 million 223-unit apartment complex with three levels of parking and retail space to be called Smallwood Plaza will be constructed on the north side of Bloomington.⁴⁶

The city of Anderson is building a new police and City Court building.⁴⁷ About 57,748 sq. ft. will be added to Zionsville High School. Bids will be sought in April.⁴⁸

The town of Bremen may build a new hospital and have applied for a \$16 million federal loan to help pay for it.⁴⁹

A 1,200-unit housing development has been proposed for the Fishers area north of Indianapolis.⁵⁰ Short-term improvements are planned next year for S.R. 37 in the Fishers area due to the dramatic growth of that area, but more permanent solutions are not yet planned.⁵¹

A company that produces autoclaved aerated concrete, Aercon Industries, may build a plant somewhere between Indianapolis and Chicago. The company has several building projects in the works in Indiana. Autoclaved aerated concrete is different from standard concrete blocks because it can be shaped, sawed, or nailed to fit specifications.⁵²

A plan was proposed to protect historic properties that would be affected by the construction of two planned bridges crossing the Ohio River in the Jeffersonville, Indiana - Louisville, Kentucky area.⁵³

Legislation and regulatory issues

A federal bill was introduced that would add regulation of the greenhouse gases carbon dioxide and methane and four other gases to the list of air pollutants already regulated under the Clean Air Act.⁵⁴ Some scientists reported new evidence for the existence of global warming.⁵⁵

The Bush Administration promoted a plan to help control the growth of greenhouse gas emissions by utilizing a voluntary reporting system designed to prevent emissions from growing at a rate faster than rates of economic growth. Several large U.S. companies are moving proactively to form an emissions trading market. It will be called the Chicago Climate Exchange. Some participants hope that this may prevent further federal regulations. Other participants believe that federal regulations will occur and hope to be further ahead when that occurs.⁵⁶ The EPA released a report, Response of Surface Water Chemistry to the Clean Air Act Amendments of 1990 that indicates levels of acidity have been decreased in water by 40 percent in those areas most affected by acid rain since the amendments took effect. Market-based emissions-trading systems are also credited with helping to decrease those levels.⁵⁷ The annual U.S. Greenhouse gas inventory was released.^{58,59}

The President proposed a fiscal year 2004 budget of \$30.4 billion, a 4 percent increase over the previous year's request, for natural resource and environmental programs.⁶⁰ About \$7.63 billion of that amount is for the EPA. The plan budgets \$7.7 million for the Clear Skies initiative.⁶¹ Legislation to enact the Clear Skies initiative was introduced in Congress.⁶² The EPA will administer the Climate VISION program. VISION stands for Voluntary Innovative Sector Initiatives: Opportunities Now and will consist of voluntary cooperative government/private sector initiatives to reduce the amount of greenhouse gas emissions. It is a response to the President's challenge for the country to reduce those emissions by 18 percent over the next 10 years.⁶³ The EPA also finalized 13 rules that should help to further reduce toxic air emissions. Several of these regulations affect industries related to the minerals industry such as asphalt, brick plants, and steel producers.⁶⁴ The Ozone Transport Commission NO_x Budget Program has contributed to reducing regional NO_x emissions by 60 percent when compared to 1990 levels. The program is a market-based trading program for NO_x emissions similar to that for SO₂ emissions which has been deemed by the EPA to be quite effective.^{65,66}

The federal government is establishing a web site to inform the public about new rulemaking, <http://www.regulations.gov>. The site also allows people to file public comment on proposed rules.⁶⁷

A coalition of shareholders filed resolutions with five major investor-owned companies that operate coal-fired electric plants, including Cinergy Corp. calling for a report on “economic risks” that might be associated with greenhouse gas emissions from the power plants.⁶⁸ Seven states plan to sue the U.S. Environmental Protection Agency (EPA) to more stringently regulate air pollutants from coal-fired power plants.⁶⁹ Stricter EPA ozone rules take effect in 2004.⁷⁰

A coalition called the Indiana Clean Energy Campaign is requesting that the state further investigate environmental and health effects caused by the aging Clifty Creek power plant west of Madison. Officials at the plant responded that they are in complete compliance and use some of the most modern pollution-control equipment available.^{71,72,73} Vectren Energy Delivery of Indiana, Inc., a subsidiary of Vectren Corp. which is a holding company whose holdings include Indiana Gas and Southern Indiana Gas & Electric Company, will spend \$244 million for NO_x compliance. The company has already spent \$66 million on needed equipment. The corporation also supplies energy to parts of Ohio.⁷⁴ The Indiana Utility Regulatory Commission (IURC) approved an environmental cost agreement settlement between the Indiana Office of Utility Consumer Counselor and Vectren Corporation that will cover the costs of installing more needed nitrous oxide emissions control equipment.⁷⁵

Northern Indiana Public Service Company received permission from the IURC to offer discounts to new businesses or those businesses undergoing expansion.⁷⁶ PSI Energy provided testimony to the IURC to support rate increases of 15 percent to cover costs for its proposed environmental compliance projects, to maintain its system, and to meet increasing needs for electric power.⁷⁷ Cinergy/PSI and the Indianapolis Power and Light Company both set winter electric demand records in January due to the extreme cold and wind-chill conditions.^{78,79}

IDEM has made an agreement with six Indiana counties and several cities that they will achieve lower rates of emissions before more stringent rules go into effect in 2004. The agreement, which was submitted to the EPA, is called an Early Action Compact.⁸⁰ IDEM is accepting public comment on methods the state can use to meet those standards.⁸¹

A federal appropriations bill was passed by the Senate in January after passing the House last year. The bill sets the level of funding for the federal highway program at \$31.8 billion. The House version of the bill set funding for the program at \$27.7 billion. The President’s budgeted request was \$29.3 billion. The difference between the two bills will be worked out in committee.^{82,83} There is some concern that if the lower figure is chosen that it may negatively affect highway appropriation in future years.⁸⁴ The U.S. Department of Transportation is requesting a budget increase of 6 percent over its 2002 request.⁸⁵ The political changes in Washington in January were not expected to greatly impact the outcome of the legislation.⁸⁶

Governor O'Bannon released a budget plan for the next two fiscal years that holds much funding at the current levels. The state construction budget would be reduced by about \$56.6 million. No new construction is budgeted under the proposal.⁸⁷ The Indiana Department of Environmental Management asked the House Ways and Means Committee to allow a permit fee increase to help maintain their program. They were also requesting new fees to improve methods of ensuring drinking-water quality. If no increase is granted, the agency predicts that they will need to cut at least 75 positions, which would significantly slow down the permit-granting procedure.⁸⁸

A bill passed the state Senate and was referred to the House that provides a tax credit for persons who purchase products produced in Indiana from at least 50 percent coal combustion byproducts and also gives a tax credit to manufacturers of such products.⁸⁹ A bill was introduced into the state House that would impose a severance tax on coal and aggregates at a rate of 4.5 percent of material removed or processed per monthly reporting period or a minimum of \$0.50 per ton. The bill did not make it out of committee.⁹⁰ Other proposed state legislation would make it impossible for the state to impose environmental standards more severe than those imposed by the federal government.⁹¹ HB 1166 provides that the Indiana coal research grant fund will be administered through the coal technology research center and establishes an eight member panel to evaluate grant applications.⁹² A bill allowing the continued transfer of funds from the Abandoned Mine Reclamation Fund to help fund the United Mine Workers of America's health-care program for retired coal miners that passed the House died in the Senate.⁹³

A U.S. Environmental Protection Agency's proposal to revise the Total Maximum Daily Load water pollution control program will be dropped because of technical problems in initiating it and because Congress passed a law preventing the revisions from being implemented.^{94,95} The federal government is considering lessening the number of acres that are currently regulated as wetlands by about 20 percent. The acreage affected would be those that are located most remotely from navigable waters and had been placed under regulation solely because of their use by migratory birds.^{96,97,98} A law that will provide federal matching funds for the restoration and protection of wetlands, the Wetlands Conservation Act, was reauthorized.⁹⁹

MSHA may receive an increase in funding for fiscal year 2003 to establish an Office of Small Mines and to increase the number of inspectors in both coal and metal/nonmetal mines to reflect the increase in the number of those operations. To help pay the increased MSHA expenses, penalties for violations were to increase.¹⁰⁰ The U.S. Department of Labor, Mine Safety and Health Administration (MSHA), issued a proposal to take over coal-dust level sampling in mines. The procedure is now handled by coal operators, but there have been problems with that program. Operators would still need to monitor levels between MSHA visits and would not be allowed to violate limits for even one shift. New portable equipment not currently available would be used to take the measurements. A final rule proposal is expected by the end of the year.¹⁰¹ Nationally, total mining fatalities declined during 2002, but there was an increase of 32 percent for deaths in aggregate mines when compared to 2001. Twenty-five of sixty-seven mining deaths were related to aggregate production in 2002.¹⁰² Twenty-seven deaths were coal-mine related, a new record

low; 42 individuals died mining coal in 2001.^{103,104} In Indiana two persons died—one at a coal mine and the other at a lime-processing facility. That number was unchanged from 2001.¹⁰⁵ Mining death statistics were further discussed in a Rock Products article.¹⁰⁶ MSHA and the National Stone, Sand and Gravel Association signed a cooperative agreement, set to last for two years, expected to reduce the number of deaths and injuries associated with mining.¹⁰⁷ For mines with five or fewer employees the Hazard Communication (HazCom) rule went into effect March 2003; larger mines had a compliance deadline of September 2002.¹⁰⁸ A list of 300 regulations is under review by federal agencies for possible modification or elimination.¹⁰⁹ Following a mining disaster last year in which several coal miners were killed, MSHA issued an emergency regulation for only the second time in its history. The regulation requires that a “Responsible Person” (RP) for each shift be designated to evacuate the mine, if deemed necessary, and explains what information the RP needs to perform his duties.¹¹⁰ As a result of that disaster, MSHA underwent a review and is implementing many reforms.¹¹¹ MSHA’s contracting policies are also under review.^{112,113}

A final rule on the management of cement kiln dust is expected to be issued by the EPA during 2003.¹¹⁴

The USGS is facing the possibility of a budget cut of \$29.8 million from the \$925.3 million budgeted in 2002. The Minerals Resource program would receive a cut of \$12.7 million from the 2002 budgeted amount. Mineral production reporting would be decreased.¹¹⁵

A Special Studies Committee for the City of Carmel is studying proposed mining ordinances to place further controls on mining within the city.¹¹⁶ Experts are being consulted.¹¹⁷

Hendricks County changed some zoning regulations that pertain to building.¹¹⁸

Metals

There were 295 more steel products added to the list of imports excluded from stiff steel tariffs. In addition, tariff levels were also lowered, the highest tariff imposed was dropped from 30 percent to 24 percent and the lowest tariff was dropped from 8 percent to 7 percent. It was determined that excluded products were not produced in sufficient quantity for the imports to be a significant problem to the domestic market.¹¹⁹ The tariffs are in effect until 2005.¹²⁰ The World Trade Organization ruled that it was illegal for the U.S. to impose the tariffs, but the U.S. will appeal that decision. If made final, the decision would mean that similar tariffs could be imposed on the U.S. by other countries. Domestic steel users also oppose the tariffs because it increases their operating costs, although the largest companies are able to push for exclusions. The tariffs are allowing some domestic steel companies time to reorganize and consolidate. The appeal process is likely to be lengthy and it could well be three years before litigation is resolved, and the tariffs will be expiring at that time as well.^{121,122,123} In March, steelmakers, due to less competition from imports, were seeking price increases of up to 10 percent for their products.¹²⁴

International Steel Group (ISG) began the process of acquiring Bethlehem Steel Corp. which had been in bankruptcy proceedings. This acquisition would make ISG the largest North American steel producer.¹²⁵ The offer made was \$1.5 billion and Bethlehem Steel Corp. could lose about one-half of its employees.¹²⁶ ISG purchased the LTV Corp. last year and the two Indiana plants are very near each other.¹²⁷ Steelworkers are willing to accept job cuts now with the expectation that ISG will grow.¹²⁸ Bethlehem Steel Corp.'s executives agreed to the deal.^{129,130} Bethlehem Steel Corp. announced that they were attempting to locate group insurance plans for approximately 95,000 company retirees and their dependents that the former employees themselves would pay for and that the company would seek permission to stop current funding health and life insurance for their retirees.¹³¹ In March however, the United Steelworkers of America and Bethlehem Steel arrived at an agreement that will provide temporary health care benefits for retirees. ISG has said that they would provide some amount of health care benefits for Bethlehem retirees if the acquisition goes through.¹³²

ISG made an agreement with the United Steelworkers of American that among other things, arranged for ISG to assume some health care costs for retirees of LTV (and those of another company), which it acquired last year. This is the first time a steel company has done so.¹³³

U.S. Steel Corp. made an offer to purchase National Steel Corp. for \$750 million in addition to assuming \$200 million in liabilities.^{134,135,136} National Steel Corp. had been in bankruptcy proceedings. U.S. Steel's production would be increased by about 40 percent with the acquisition. The company would become the fifth largest steel producer in the world.¹³⁷ U.S. Steel experienced a profit in the fourth quarter of last year, for the first time since 1999.¹³⁸ The company began labor negotiations with the United Steel Workers of America and also received antitrust clearance for the acquisition.^{139,140} A counter offer of \$825 million plus the assumption of the liabilities was made by AK Steel Corp.^{141,142} AK Steel increased its offer by \$100 million at the end of January.¹⁴³ The proposed acquisition received antitrust clearance in February.¹⁴⁴ AK Steel has a history of problems in resolving disagreements with steel unions so negotiating a new contract with union steelworkers could prove difficult if the acquisition goes through.^{145,146} The company's Rockport plant¹⁴⁷ was unionized on March 5.

IDEM announced that it would extend the waste water permit for AK Steel even though it has not met water-quality standards set by the state.¹⁴⁸ All AK Steel plants received ISO 14001 international environmental registration.¹⁴⁹

Steel Dynamics is purchasing GalvPro, a galvanized steel plant that started in 1999 as a partnership between Weirton Steel and the Corus Group. The GalvPro plant had been in bankruptcy since 2001.^{150,151} Following the Steel Dynamics acquisition of Qualitech Steel in Pittsboro, a lawsuit was filed contesting the company's right to purchase the company. The lawsuit was settled and Steel Dynamics will be allowed to keep the acquired company.¹⁵² The Qualitech mill will become the Bar Products Division of Steel Dynamics and will start undergoing necessary conversion in the last half of 2003.¹⁵³ Steel Dynamics will restart its Iron Dynamics

operation which makes liquid pig iron.¹⁵⁴

Alcoa Inc., following a continued downturn in business, plans to sell some of its units and lay off about 8,000 employees internationally. It is reported that most layoffs will affect businesses outside of the U.S.¹⁵⁵

Indiana metal-casting foundries have suffered setbacks due to large quantities of Chinese imports. Up to 30 percent of Indiana's approximately 150 foundries have closed within the past five years.¹⁵⁶ However, demand for steel is very high in China at this time and steelmakers have been exporting great quantities at high price.¹⁵⁷

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Indiana Mineral Industry News 2nd Quarter 2003

By Kathryn R. Shaffer
Indiana Geological Survey

Production

Indiana coal production through the week ended June 28, 2003 was 17.0 million short tons, a 6.2 percent decrease from the same period of the previous year according to the U.S. Department of Energy, Energy Information Administration (EIA). Indiana ranked seventh nationally as of this time period.¹ Nationally, there has been a trend for some utilities to carry smaller stockpiles of coal than usual, particularly in deregulated markets, which has resulted in lower demand for coal. It was expected that demand would increase as the summer cooling season progressed.²

Nationally, **U.S. coal production**, at 1,093.8 million short tons declined 3 percent from 2002 levels, but for the ninth consecutive year production exceeded one billion short tons.³ Also nationally, 2002 crushed stone production was at its second highest level on record at 2.7 billion metric tons.⁴

According to data published by the U.S. Geological Survey (USGS) for the first quarter of 2003, the most current data available, **Indiana production of crushed stone** was 7.6 million mt and Indiana production of construction sand and gravel was 4.9 million mt demonstrating a decrease of 9.3 percent and an decrease of 12.6 percent, respectively, when compared to the same period of 2002.⁵

The Portland Cement Association (PCA) slightly revised its projections for 2003 and 2004. **Cement consumption** is expected to decrease overall by about 1.9 percent from 2002 levels to an estimated total of 109 million mt. However, consumption is projected to improve 2.5 percent in 2004 with an increase of 3-4 percent for the following year.⁶

Industry news

Peabody Energy purchased the remaining 18.3 percent of Black Beauty Coal Company for approximately \$90 million.⁷ Management will remain unchanged. Peabody Energy will also own an Illinois company in which Black Beauty had a 75 percent interest and in which Peabody had purchased a 25 percent interest last year.^{8,9,10} Peabody reported that they purchased Black Beauty Coal Company because of its record of growth.¹¹ An underground mine will be developed at the company's Francisco mine which has been a surface operation. A revised coal-contract with PSI Energy has been secured to allow this development.^{12,13} Peabody Energy was the top producing coal company during 2002 according to a survey taken by the National Mining Association.¹⁴

Ron Laswell, who was involved with the former Buck Creek Coal Company, is permitting land for two underground coal mines under the company name **Sunrise Coal LLC**. One, the Carlisle Mine in Sullivan County, is a deep mine and is planned as a joint venture with Solar Sources which will move some men and equipment there from the Monroe City Mine which should start shutting down sometime next year. The coal seam to be mined is the Springfield (V) and production is expected to be more than 1 million tons per year. The other permit is for a smaller mine in Clay County to be called the Howesville Mine. That mine would produce about 400,000-500,000 tons per year; half of the permit area is expected to be compliance coal. Production will be from the Lower Block coal seam with half of the reserves being compliance coal.¹⁵

Worker Adjustment and Retraining Notification Act (WARN) Notices were issued for Beech Coal Company's Sycamore Mine which is being idled.¹⁶ Sycamore was shut down, at least in part, because of the **Horizon Natural Resources** bankruptcy proceedings. Horizon is working to come to decisions regarding its coal leases and to finalize a reorganization plan. It received deadline extensions until August 13.^{17,18} Horizon may sell three of its Indiana properties to Black Beauty Coal Company for \$3.8 million: \$2.1 million for the South Arthur tract (part of Kindill Mining property), \$1.19 million for a Gibson County tract, and \$51,000 for a Kindill Mining Gibson County tract. The properties will be offered for auction to assure that the best price possible has been secured.^{19,20}

DTE Energy, which operates 9 synfuel production facilities with 22 production lines, 2 of which are in Indianapolis, may cease operations if **synfuel** production loses U.S. Internal Revenue Service (IRS) Section 29 tax credits. The IRS is determining whether or not the manufacturing process makes a "significant chemical change" in the coal, which is required to earn the tax credits. The company has been trying to sell some of its plants.²¹

Hanson Materials, which operates several aggregate operations in the state, formed Hanson Brick from 22 plants in Texas, Kentucky, Michigan, the Carolinas, and Canada.²²

Pit and Quarry Magazine released its annual list of **top aggregate producers** in the country. Vulcan Materials Company, Martin Marietta Materials Inc., Hanson Building Materials America, and Oldcastle Materials led the listings (in that order). All of these companies have operations in Indiana. Vulcan Materials Company was the top crushed stone producer and Hanson Building Materials America was the top sand and gravel producer.²³

The National Stone, Sand and Gravel Association celebrated 100 years of existence. An article about the organization's history appeared in Rock Products Magazine. The organization started in 1903 and was called National Quarry Owners Association. Of the 45 original members, 12 were Indiana companies. None of those companies are still in existence under the names that they used in 1903.²⁴

S.E. Johnson, the parent company of Stoneco, Inc., was acquired by **Oldcastle Materials Group**. Oldcastle, headquartered in Washington, DC, plans to sell \$40 million of Johnson assets, bringing Oldcastle's cost for the acquisition to \$217 million.^{25,26,27}

The PCA awarded its **2002 Innovations in Safety Awards**. The Lehigh Cement Company in Mitchell, Lawrence County, received the top award in the quarry division for developing a retractable platform that allows employees to safely clean windows of the control room for the primary crusher.²⁸ The PCA also agreed on a voluntary goal to reduce cement kiln dust emissions by 60 percent from 1990 levels by the year 2020. Three-fourths of members voted, and they voted unanimously.²⁹

Bybee Stone Company held their annual Limestone Sculpture Symposium in June where artists learn about sculpting with Indiana Limestone.³⁰

A feature article appeared in North American Quarry News about **Mulzer Crushed Stone, Inc.**, and equipment used at its New Amsterdam Quarry.³¹ During the quarter, Mulzer Crushed Stone, Inc. also launched some new barges for transport on the Ohio River System.³²

An article about problems affecting neighbors of the numerous sand and gravel pits in the **Waverly area** and about **Martin Marietta Aggregate's** failed attempts to expand its Carmel operation appeared in the Indianapolis Star newspaper on June 11.³³

Two trespassers drowned in **Indiana State Materials LLC's** Hancock County gravel pit in June while driving all-terrain vehicles. One vehicle had gone in and both died trying to retrieve it.³⁴

Construction industry developments

Nationally, **construction spending** during 2003, while below 2001 and 2002 levels, should rank as the fourth highest year ever recorded, according to the PCA.³⁵

The draft environmental impact statement for **I-69** will be finalized by the end of the year and will be submitted to the Federal Highway Administration (FHA) for approval. The Indiana Department of Transportation (INDOT) also expects that approval will be granted by year's end. If approved, the corridor will be divided into six parts and environmental studies and highway design will be prepared for each of those. Environmental groups opposed to the planned route may file a lawsuit. Some state that they are particularly concerned about impacts on karst areas and the endangered Indiana bat.³⁶ State officials chose the eastern alignment around the city of Washington for the proposed I-69 extension.^{37,38,39} There is a river west of the city that would have caused construction problems, and the eastern choice is the most direct route.⁴⁰

The city of Indianapolis is considering constructing a "Cultural Trail" at a cost of between \$15 and \$20 million on existing streets in Indianapolis—some traffic lanes would be lost. The trail

would encourage pedestrian and bicycle traffic. Some supporters believe it would encourage development, others are concerned about impeding traffic. It would take 15 years to build.⁴¹

The Federal Highway Administration approved the plan to build **two bridges across the Ohio River** between Louisville, Kentucky, and Indiana. The so-called “Spaghetti Junction” of interstates in Louisville will also be rebuilt. Following a 60-day review by other federal agencies, approval should be granted to allow for design work, land acquisition, and construction to begin. Estimated date for completion of the projects is between 2017 and 2020.⁴²

In April, work resumed on the \$8.6 million project to reconstruct a portion of **SR 37** in Johnson and Morgan Counties.⁴³

Baxter Pharmaceutical Solutions announced a \$100 million expansion at the company’s Bloomington facilities.⁴⁴ **The Bloomington Planning Commission** approved several area construction projects that include residential and church properties.⁴⁵ Many construction jobs were underway in Bloomington this Spring and Summer. A new Target store, a Best Buy store, and three apartment buildings downtown among many smaller jobs were keeping area contractors busy.⁴⁶ **Indiana University trustees** approved the construction of two new buildings on the north edge of the Bloomington Campus—the second phase of a multidisciplinary science building for \$42.5 million and a \$40 million computing facility.^{47,48}

The **Ellettsville development plan** was discussed by the Monroe County Plan Commission in May.⁴⁹

The **Indianapolis Hyperfix project** to resurface a stretch of I-65/I-70 east of Indianapolis got underway this quarter. Contractors opted to use a hydrodemolition method which uses high-powered water (20,000 pounds per square inch) to remove old concrete. Only 50 of these units are used in the U.S. and while more expensive, the process is much quicker and more environmentally friendly than traditional methods. The contractors found it cost-effective because of the offer of a \$2.6 million bonus to complete the project 10 days ahead of the 85-day deadline.^{50,51} The project started Memorial Day.⁵²

Construction continues at the **Gary East Interchange** of the Indiana Toll Road. Two bridges are being constructed on I-65 over the toll road ramp. The total cost of improvements will be \$14.5 million.⁵³

Many **highway construction jobs** were contracted out. In 2005 an 11-mile stretch of the western portion of I-465 will undergo a \$425 million upgrade. Renovations will be made to it similar to those made to the eastern side including lane widening and ramp improvements to help handle higher rates of use than the highway was designed for.⁵⁴ US 31 in Hamilton County will be upgraded to a freeway with three travel lanes in each direction and interchanges at an estimated cost of \$426 million to \$434 million. Many homes and business plus one church along

the route will be demolished.^{55,56,57} Ground was broken on a \$190 million highway project that will realign and rebuild US 231 between I-64 and the Natcher Bridge in Spencer County.⁵⁸ INDOT awarded several highway construction projects during the quarter totaling in excess of \$356 million. Some of the more significant ones are included among the following. Approximately \$28 million was awarded for added travel lanes and interchange construction on I-70 in Hendricks and Marion County; \$27 million for new bridges and box culverts on I-70 in Marion County; \$20 million for road rehabilitation and signs for a stretch of US 41 in Gibson and Knox Counties; \$18 million for added travel lanes, a new bridge, and signal modernizations to SR 66 in Warrick County; \$18 million for pavement and bridge work on SR 46 in Bartholomew and Decatur Counties; \$16 million for road reconstruction with added travel lanes and bridge replacement on US 36 in Marion County; \$15 million for added travel lanes and roadwork on US 27 in Adams County; \$15 million for pavement rehabilitation, bridge replacement, and signal modernization on SR 135 in Washington County; \$14 million for pavement replacement, bridgework, and signs on SR 62 in Vanderburgh and Warrick Counties; \$10 million for road reconstruction, added travel lanes, and a new bridge on Indiana Avenue, city of Elkhart, Elkhart County; and \$11 million for pavement and bridge replacement on a stretch of US 41 in Lake County.^{59,60,61}

Southern Indiana is being considered as a possible site for a \$900 million **Boeing airplane assembly plant**, most likely near the Clark County Airport and the Clark Maritime Center.⁶²

Engineers at Purdue are studying the effect of different types of pavements and different types of tires on noise production and plan to use test tracks and tires that contain embedded sensors.⁶³

Environmental issues

The U.S. Department of Energy (DOE) plans to build a coal plant—called **FutureGen**—that will virtually eliminate harmful emissions. The plant will convert coal into hydrogen-rich gas instead of directly burning it. The hydrogen will be used to turn a turbine, stored in a fuel cell for generating electricity, or sent to a refinery to upgrade petroleum. Nitrous oxides (NO_x) and Sulfur dioxide (SO₂) emissions will be trapped and converted to such useful byproducts as fertilizers. Carbon dioxide (CO₂) emissions will be sequestered underground. At first the plant is expected to sequester approximately 90 percent of CO₂, but that is expected to increase to include almost all of the carbon emissions.⁶⁴ The hydrogen byproduct could be used to power the hydrogen-powered vehicles called for during President Bush's State of the Union address. Studies are being conducted to locate possible carbon sequestration sites.⁶⁵ To further study **carbon sequestration**, and to participate in the construction of this plant, the DOE signed an international agreement that establishes the Carbon Sequestration Leadership Forum with partner countries Australia, Brazil, Canada, China, Colombia, India, Italy, Japan, Mexico, Norway, the Russian Federation, the United Kingdom, and the European Commission.^{66,67} Legislation is being discussed by some legislators that would make coal the preferred source for **hydrogen**.⁶⁸

The U.S. Environmental Protection Agency (EPA) released a proposal to regulate emissions of **off-road diesel engines**. Companies manufacturing these engines will have to begin incorporating these changes by 2008 and be fully compliant by the year 2014. NO_x and particulate matter (soot) from this category of vehicle are expected to be reduced by more than 90 percent. By 2007, sulfur content of diesel fuels will be dropped from the current level of 3,400 parts per million (ppm) down to 500 ppm and be reduced further to 15 ppm by 2010, a 99 percent reduction from current levels.^{69,70} The changes are expected to add 1 to 2 percent to the cost of new equipment and to add a few cents to the cost of the fuel.⁷¹ The cost, \$1.5 billion a year over the next 27 years, is projected to be offset by health-related savings of from between \$16 billion to \$80 billion per year. The full environmental impact will not be felt until 2030 due to the time it takes to retire old equipment.⁷² The EPA has already set sulfur content standards for on-road diesel engine fuel which must be met by 2006 and engine standards for those vehicles which must be met by 2007.⁷³ The proposed rule, with other information, can be found at: <http://epa.gov/nonroad>.⁷⁴

A government report on the **EPA National Pollution Discharge Elimination System** found many problems with it and a need to update the computerized system which is used in enforcing Clean Water Act regulations. It is estimated that it will be at least three years before the system is fully effective.⁷⁵ The EPA dropped its proposal to revise the **Total Maximum Daily Load** water pollution control program because of technical problems in initiating it and because Congress passed a law preventing the revisions from being implemented.⁷⁶

The EPA released a report, **Draft Report on the Environment**, that shows that the U.S. has made great improvements in its environment during the last 30 years.^{77,78,79} **Christine Todd Whitman** resigned as Administrator of the EPA.⁸⁰ The Bush Administration was seeking a replacement.⁸¹

The President's **Clear Skies initiative** which would set caps on SO₂, NO_x, and mercury emissions is supported by Cinergy even though it will cost the company \$1.5 billion because the plan gives companies greater freedom in determining how to meet the new limits. The plan is criticized by environmental groups because it will allow some companies that produce large quantities of emissions to continue doing so by trading emissions credits under a voluntary program with companies that have already met the standards.⁸² **Cinergy** dedicated their Noblesville Generating Station, which was converted from a coal-fired to a natural gas-fired plant. In addition, the plant will generate 300 MW instead of the 90 MW it had been producing and emissions will be reduced.^{83,84}

Countries that have signed the **Kyoto Protocol** (about 100) are subject to mandatory caps on carbon emissions. An **international carbon market** has developed that allows countries to trade emissions credits. Europe appears to be dominating this market and writing the rules as the market develops. The U.S. is developing a voluntary market called the **Chicago Climate Exchange**. Some critics believe that the voluntary market will not be very successful and that

the U.S. is missing out on opportunities to make profits in the international carbon market.⁸⁵

Northern Indiana Public Service Company (NIPSCO) has received approval through the Indiana Utility Regulatory Commission (IURC) to recover costs associated with the installation of equipment to allow the company to meet new **NO_x emission standards**. The ratepayer will be charged, on average, an increase of about \$0.53 per month. The company has estimated its cost to achieve compliance at approximately \$234 million. Emissions are expected to be decreased by about 70 percent from May to September, which is considered the “ozone season.”⁸⁶

Southern Indiana Gas and Electric Company (SIGECO) signed a consent decree settling a federal lawsuit. The company was charged with making major modifications to its **Culley Station plant** without also installing air-pollution control equipment as required by the Clean Air Act. As part of the settlement, the company will spend about \$30 million to come into compliance, pay a civil penalty of \$600,000, and reduce emissions of sulfuric acid at the plant at an estimated cost of \$2.5 million. The company must decide whether to convert its oldest unit at the plant to natural gas or to retire it.⁸⁷ The company denies that the improvements made to the plant were major, but decided to settle rather than incur further costs connected with the lawsuit.^{88,89}

A public discussion between area residents and Indiana Department of Environmental Management (IDEM) representatives was held in Madison to discuss environmental problems associated with **Indiana-Kentucky Electric Company’s Clifty Creek plant** which has new air and water permits under consideration.^{90,91,92} IDEM prepared to move into its new subdistrict office in Petersburg, formerly used by INDOT, on June 27.⁹³

The Smithsonian-Harvard Center for Astrophysics, Center for the Study of Carbon Dioxide and Global Change in association with the University of Delaware’s Center for Climatic Research conducted a study covering a 1,000-year time period and concluded that the **hottest time period** occurred not in the 20th Century, but most likely between 950 and 1100 AD.⁹⁴

A ground-breaking ceremony was held at the **Wabash River IGCC plant** on May 26 for the fuel cell portion of the Kentucky Pioneer IGCC/Fuel Cell Project. The Kentucky part of the project will be designed to make electricity from a blend of coal and refuse-derived fuel (pelletized municipal solid waste). The Indiana part of the project will test a 2-MW molten **carbonate fuel cell** that will use syngas as its fuel.^{95,96}

A bill that would have **allowed an increase in certain emissions** from steel mills and foundries for a period of five years if the standard demanded more than that of federal regulations passed both the State Senate and House, but was vetoed by the Governor. The law was proposed because of the expense that the steel industry must bear to install equipment that allows the industry to meet the state standards.⁹⁷

The Federal Highway Administration released a report stating that 80 percent of all **asphalt** removed each year is recycled into new pavement. This rate is higher than that for any other **recycled material** including cans, glass, and paper.⁹⁸

Vulcan Materials Company's Francesville sand and gravel plant received a Silver Award in the medium size operation category for the year 2002 from the National Stone, Sand and Gravel Association's annual Environmental Eagle Awards program.⁹⁹

Legislation and regulatory issues

The Bush Administration has proposed a fiscal year **2004 highway budget** of \$30.2 billion which includes \$1 billion available immediately for those projects that are ready to start at the beginning of the year. An additional \$3.4 billion would be available for the Airport Improvement Program and \$7.2 billion for transit funding.¹⁰⁰ The House passed a 2004 budget bill which included an allocation of \$32 billion for highways with the possibility of increasing that amount if the Highway Trust Fund can be increased.¹⁰¹ The Administration's fiscal year 2004 budget request also suggested a reduction of \$8.1 million for the **U.S. Geological Survey's Mineral Resource Program**.^{102,103}

A Senate subcommittee marked up a \$320 billion bill to **reauthorize TEA 21** with \$255 billion of that amount designated for highway construction over six years.¹⁰⁴ The House Infrastructure and Transportation Committee proposed a six-year \$375 billion TEA 21 reauthorization plan with \$49.1 billion budgeted in 2004 increasing to \$75 billion in 2009. The budget is based on an analysis by the U.S. Department of Transportation.¹⁰⁵ The President's plan, called the **Safe, Accountable, Flexible and Efficient Transportation Equity Act of 2003 (SAFETEA)** would supply \$247 billion over six years, \$128 billion less than the aforementioned House Committee. The provisions of the bill are available on the web at <http://www.fhwa.dot.gov/reauthorization/safetea.htm>.^{106,107} About \$201 billion is for highways with \$46 billion for transit.¹⁰⁸ This could be the largest public works bill ever funded in the U.S. **Indiana** has applied for \$1.4 billion in federal funding. The state generally receives about \$700 million each year. A report generated by the Indiana Local Technical Assistance Program at Purdue University states that Indiana will require about \$200 million more each year to meet its highway needs through 2010.¹⁰⁹ States unhappy with the way funding is divided among states are introducing legislation to change the apportionment so that they could receive 95 percent of every tax dollar submitted back for highway projects.^{110,111} Indiana could lose up to \$16 million in 2004 under the President's plan.¹¹²

Legislation was introduced that would create a one-time \$50 billion program that would be used **in addition to TEA 21 reauthorization** to help fund highway construction projects. The plan involves the purchase of 30-year federal bonds.¹¹³

The Senate Subcommittee on Clean Air, Climate Change, and Nuclear Safety held a hearing to

discuss **ethanol**. A representative from the American Road & Transportation Builders Association argued that the **Highway Trust Fund (HTF)** will be decreased by about \$21.5 billion by the year 2012 because the tax generated from ethanol-blended fuel is deposited into the General Fund instead of the HTF. The association states that this is unfair because the ethanol-based vehicles still use the same highways and cause them to wear out or degrade. There is proposed legislation to mandate that the amount of gasohol offered in all of the states be increased each year. The Corn Growers' Association reportedly would support the tax reform.¹¹⁴ It is expected by industry sources that the Senate Finance Committee will prepare legislation to correct this.¹¹⁵

A comprehensive **energy bill (HR 6)** was passed by the U.S. House of Representatives. The bill provides for continued research into clean coal technology. Among other things, the bill also provides \$3.2 billion for hydrogen power and nuclear studies.¹¹⁶ \$2 billion would be spent over 10 years for the Clean Coal Power Initiative. Also, a post-2009 mandate requiring 80 percent of clean coal spending be for coal gasification technologies was eased.¹¹⁷ Senate debate continues.^{118,119}

The U.S. Department of Energy, Energy Information Administration released a report analyzing the introduced bill **S. 139, the Climate Stewardship Act of 2003**, introduced in January, at the request of several Senators. The summary of those findings can be found at <http://www.eia.doe.gov/oiaf/servicerpt/ml/pdf/summary.pdf>.¹²⁰

Legislation to reauthorize a federal aviation program, called **The Flight 100 - Century of Aviation Reauthorization Act (Flight-100)** and including \$3.4 billion for the federal **Airport Improvement Program** in 2004, was introduced.^{121,122} The current act expires September 30.¹²³

A federal bill was also introduced to reauthorize funding for **wastewater infrastructure** construction maintenance and repair.¹²⁴

The House Resources Committee is studying the **Endangered Species Act** and may propose legislation to reform it.¹²⁵ Senator Inhofe who has become the head of the Environment and Public Works Committee said that the committee will use cost-benefit analysis based on sound science in creating environmental rules and with more emphasis on assisting the public than on creating new regulations.¹²⁶

Governor Frank O'Bannon's extensive state economic development legislation, titled "**Energize Indiana**," was defeated by the legislature. The plan would have provided \$1.25 billion over 10 years for economic development projects.¹²⁷ However, some pieces of it were incorporated into the state's \$22.7 billion budget including the new Indiana Economic Development Corp. and funding for several higher-education construction projects. The governor's plan to divert one-third of the three-cent gas tax increase for the State Police was rejected.^{128,129} Many **states have been diverting funds** intended for highway programs for other purposes due to budget shortfalls.

The U.S. Senate Finance committee approved a plan to supply \$20 billion to be split by state and local government to take care of essential services that could include transportation.¹³⁰

In a clarification of the new **Safe Explosives Act**, the **Mine Safety and Health Administration (MSHA)** stated that all applications would be administered through the Bureau of Alcohol, Tobacco and Firearms, but that MSHA would continue to inspect mines to check for compliance.^{131,132} An article about the new explosives regulations appeared in the April issue of *Rock Products*.¹³³ MSHA will **increase most fines** by 10 percent to adjust for inflation. Fines have not been adjusted since 1998.^{134,135,136} Indiana was awarded an MSHA grant totaling \$177,442 for **mine safety training**, education, and related matters; a total of \$7.8 million was awarded to states for this purpose.^{137,138} MSHA conducted public meetings in several cities, including Evansville, to discuss its proposal to take over **coal-dust sampling** in underground mines. While the **United Mine Workers of America (UMA)** has requested this action in the past, they oppose the current proposal because they believe that the dust-level limits will be allowed to increase by four times the current levels and with little ramifications to the mine operators. They are also concerned that MSHA will not take measurements often enough. MSHA refutes those charges although it states that companies with few violations will be inspected less. **Lightweight personal dust monitors (PDM's)** that miners can wear themselves are also being developed.¹³⁹ The device should be ready by next Spring and can instantly send data to MSHA.^{140,141} The UMA wants allowable dust levels to be reduced and **dust-level sampling** to be conducted at least 36 times per year.¹⁴² MSHA announced that it would delay final rule-making until the results of tests on the PDMs are complete.¹⁴³ MSHA and the **Industrial Minerals Association-North America** signed a cooperative agreement designed to decrease the number of deaths and injuries associated with mining. MSHA signed a similar agreement with the **National Stone, Sand and Gravel Association** earlier this year.¹⁴⁴ An article appeared in *AggMan Online* about the MSHA **Small Mines Office** that was launched last fall.¹⁴⁵ MSHA passed a final ruling that allows the **testing, evaluation, and approval of mining equipment** by independent laboratories as long as MSHA standards, or the equivalent, are met.¹⁴⁶

IDEM released its 2002 Enforcement Report. The agency collected \$3 million in penalties and enforced 575 environmental violations during that year.¹⁴⁷ The agency's **2001 Toxic Release Inventory (TRI) report**, issued in June, reveals that toxins released by Indiana industry were reduced by 9.1 percent during that year when compared to 2000 levels. Indiana remained eighth in the nation in terms of its toxic chemical releases. American Electric Power's Tanners Creek and Indianapolis Power and Light's Petersburg had the number one and two positions, respectively, for top reducers during 2001. A. K. Steel and U.S. Steel Gary Works had the number one and two positions, respectively, for facilities with most releases during that period.¹⁴⁸

Plainfield's Town Council, based on a study by the town's Plan Commission, voted to regulate the types of subdivisions and houses built there due to a concern that too many houses had a cookie-cutter appearance.¹⁴⁹

Metals

U.S. Steel Corp. and the United Steel Workers of America (USWA) forged a new **labor contract** that also covers the plants owned by National Steel Corp. U.S. Steel is in the process of acquiring National Steel Corp. The contract will last through September 2008.¹⁵⁰ **A.K. Steel Corp.** also is still attempting to acquire National Steel Corp. However, that company could not reach a labor agreement with the steelworkers union.¹⁵¹ U.S. Steel made a new offer of \$975 million that includes steelmaking and steel finishing assets as well as a taconite mine—National Steel Pellet Company. The bid included \$775 million for the assets and \$200 million for assumption of liabilities.^{152,153} The U.S. Steel bid was increased again to a total of \$1.05 billion. A bankruptcy auction held on April 17 identified U.S. Steel as the top bidder for the company.^{154,155} **The bankruptcy judge approved the acquisition of National Steel by U.S. Steel.**^{156,157} As part of the acquisition, U.S. Steel offered employees early retirement as a means of cutting the number of staff. The company will protect some jobs because of an agreement not to sell parts of the coke, iron ore, and transportation businesses.¹⁵⁸ Top management was also reorganized, cutting approximately 20 percent of positions.^{159,160} The acquisition was completed in May.¹⁶¹

A technical article about **upgrades to equipment** used at **U.S. Steel's Gary Works** appeared in an Association of Iron and Steel Engineers article.¹⁶²

U.S. Steel operates an Internet and telephone-based ordering system for small businesses. Called **Straight-Line Source** it has been in operation for about a year and is not yet profitable, but serves to divert excess steel from the market.¹⁶³

A bankruptcy judge approved the sale of Bethlehem Steel Corp. to International Steel Group (ISG) in April for \$1.5 billion. ISG is not assuming the companies liabilities.¹⁶⁴ The decision allowing Bethlehem Steel to cut retiree benefits for 300 employees not covered by the 1992 Coal Act—which guarantees pensions—was appealed in federal court by the United Mine Workers of America (UMWA).¹⁶⁵ Papers were signed to complete the acquisition at the end of April and in early May.¹⁶⁶

In the Spring, **Steel Dynamics** completed its acquisition of the **Jeffersonville GalvPro plant**. The plant is a galvanizing plant that had been operated by Weirton Steel Corp. and The Corus Group. Steel Dynamics also made plans to restart Iron Dynamics.¹⁶⁷

Ispat Inland announced that they would take the #7 blast furnace down for relining in the early part of the third quarter.¹⁶⁸

The International Trade Commission held hearings to determine what impact the steel **tariffs** have had on the U.S.¹⁶⁹ Through May 2003 total steel imports are down 16.3 percent and finished steel imports are down 8.3 percent when compared to 2002.¹⁷⁰ Steel shipments

increased 8.8 percent for the first quarter of the year when compared to the previous year.¹⁷¹

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Indiana Mineral Industry News 3rd Quarter 2003

By Kathryn R. Shaffer
Indiana Geological Survey

Production

Indiana **coal production** through the week ended September 27, 2003 was 25.9 million short tons, a 3.5 percent decrease from 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 this time period.¹ The demand and supply of Illinois Basin Coal appears to be balance for the remainder of the year and probably next, based on coal contracts.²

According to data published by the U.S. Geological Survey (USGS) for the second quarter of 2003, the most current data available, Indiana **production of crushed stone** was 16.0 million mt and Indiana **production of construction sand and gravel** was 8.4 million mt demonstrating an increase of 2.1 percent for each commodity when compared to the same period of 2002.³

Total U.S. **shipments of cement** were down 2.6 percent during the first quarter of the year when compared to the same time period in 2002.⁴

The Fredonia Group, a research firm that sells data, predicts worldwide **demand for aggregate products** to increase by 4.7 percent each year through 2007 and the demand in the U.S. is expected to increase by 2.1 percent each year for this time period.⁵ Results of a study funded by the National Stone, Sand and Gravel Association (NSSGA) shows benefits to the nation's economy of approximately \$14.59 billion directly and \$37.61 billion indirectly by the aggregates industry.^{6,7}

During the third quarter, approximately 17.6 million short tons of **steel** were produced in the Indiana/Chicago area, an 8.2 percent increase over production during the same period of 2002.^{8,9}

Industry news

Lehman Brothers is decreasing its holdings in **Peabody Energy** to 19 percent by selling 5.4 million shares in the company. Lehman had purchased all of Peabody in the late 1990s.¹⁰ Peabody Energy was the nation's leading coal producer for the year 2002. With about 197.5 million short tons of production, the company produced 18 percent of the nation's coal.¹¹

Black Beauty Coal Company plans to develop an underground mine at its **Francisco** operation in Gibson County. It signed a 12-year coal-supply contract to allow the company to make this development. Production from the underground mine is expected to start at approximately 1

million short tons a year and it should enter production in 2004.¹²

Horizon Natural Resources extended its deadlines with the bankruptcy court again. This time they were extended to August 25. Three Indiana reserves were put up for auction. **Triad Mining** won South Arthur in Pike County, and **Black Beauty Coal Co.** won Kindill and Fairview reserves in Gibson County. The Fairview reserve is also known as Oakhill East and West.¹³ The company completed a five-year business plan and asked for another extension.¹⁴

A fourth production unit was added to **Gibson County Coal**.¹⁵

A **massive power outage** affected the states of Vermont, New York, Connecticut, New Jersey, Pennsylvania, Ohio, Michigan, and a part of Canada.^{16,17,18,19,20} The outage caused a flurry of articles about power grids, what could have caused the blackout, and what might be done to prevent future problems.^{21,22,23,24,25} The State Utility Forecasting Group released a report that says that the state's electric generating capacity must show an increase of 10 percent by 2008 to be able to meet projected energy needs.^{26,27}

Due to the economic climate, there have been many **coal company consolidations** nationwide since the early 1990s.²⁸

A cloud of **methane gas** was released along U.S. 41 near Sullivan. It is believed that an abandoned mine roof collapsed causing a fissure.^{29,30} It was estimated that the cost of capping the leak permanently could reach \$100 thousand.³¹

At a Senate Energy Committee meeting, Alan Greenspan, Federal Reserve Chairman, stated that **increasing the use of coal** at electric power plants could decrease the demand for natural gas, helping to ease the current supply crisis.^{32,33}

The **United Mine Workers of America** delegates to a special convention voted to reorganize the union to save money for legal efforts.³⁴

The Primedia publications **Engineering & Mining Journal**, and **Coal Age** stopped publication then were³⁵ sold to Lobos Services Inc. Publication has not yet resumed.³⁶

The 2003 CD-ROM of the **Aggregates Industry Atlas of the United States** was released by the USGS, the NSSGA, and Rock Products Books.³⁷ **Valentin V. Tepordei**, a crushed stone commodities specialist with the USGS, is one of the developers of this CD-ROM. He also received the U.S. Department of the Interior's Meritorious Service Award which is the department's second-highest employee award.³⁸

Hanson Aggregates gave 450 acres valued at \$5 million that includes abandoned rock quarries and wooded areas to DePauw University near Greencastle. It will become the DePauw

University Nature Park and rock climbing may be allowed on the quarry walls.^{39,40,41} Hanson has been gifting properties in other states as well.⁴² Hanson released a Social Responsibility Report that explains how Hanson conducts its business to help protect the environment.⁴³

Shattercones from Rogers Group, Inc., Newton County Quarry are on display at the Griffith Observatory in Los Angeles, Ca, as well as other places.⁴⁴

The **St. Meinrad Archabbey dimension sandstone quarry** in Spencer County will be reopened by Mansfield Stone Inc. which has leased the property. It will be marketed around the world, but the monastery will also use stone from it for building and other purposes. The stone will be trucked to Brazil, a 125 mile trip, for milling. Many jobs initially will be for restoration of buildings that had been constructed with the stone.⁴⁵

There has been an increase in the sale of **fake dimension limestone** made of cast concrete. An Indiana producer is Custom Cast Stone in Westfield who plans to double production next year. In response, the producers of dimension limestone formed a national trade group called the **Natural Stone Council**.^{46,47,48,49,50}

An article appeared in the Herald-Times newspaper about the **Prairie Group**, a concrete producer with sand and gravel operations in Indiana, and how busy the company has been with the many construction projects underway in Bloomington. The company operates a concrete plant south of Bloomington.⁵¹

Aggregates Manager published an article about **Sellersburg Stone Company's production of manufactured sand**.⁵²

Hilltop Basic Resources, Inc. and the equipment used there were discussed in a North American Quarry News article.⁵³

There was unresolved controversy over the permitting of a 352-acre **sand and gravel operation near a Martinsville** housing subdivision during the quarter.⁵⁴

Environmental issues

The **Carbon Sequestration Leadership Forum** held its first meeting in Virginia with partner countries Australia, Brazil, Canada, China, Colombia, India, Italy, Japan, Mexico, Norway, South Africa, the Russian Federation, the United Kingdom, the United States, and the European Commission. The Forum established a charter and will meet again in Italy in January. Policy and Technical groups were organized. Proceedings can be viewed at <http://www.usea.org>.⁵⁵ The DOE announced seven regional partners that will study the best methods of sequestering carbon dioxide.^{56,57} The Indiana Geological Survey is participating in these studies.

The **U.S. Environmental Protection Agency (EPA)** updated its model to measure benefits from the proposed Clear Skies Act. The new model confirms that air quality would be significantly improved. The agency estimates ultimate benefits of \$3 billion in parks/wilderness areas, and reduction of 70 percent of sulfur dioxide, mercury, and nitrogen oxides in 2018 when compared to 2000.^{58,59} With the addition of new diesel regulations, air pollution should be mostly eliminated in the eastern U.S., according to the EPA.⁶⁰ An evaluation of the possible effects of the legislation was released in a report by the EIA. Some House members believe that mercury content could be reduced further.^{61,62} Stricter plans are also being considered.⁶³ EPA's Science to Achieve Results (STAR) program awarded \$10 million in research grants to study the impact of air pollution on health, the impact of pollution on children's health, and watershed protection.^{64,65} Final lime manufacturing air toxics standards were announced by the EPA.⁶⁶ The EPA gave final approval for changes in air pollution rules to allow older power plants to make some (up to 20 percent) changes to their plants without the need to install new air pollution control equipment. Up to 20 percent of equipment replacement costs can be considered routine maintenance.^{67,68,69,70,71} The agency faces lawsuits over the issue.⁷² The EPA also announced that they did not have legal authority to regulate carbon dioxide emissions from automobiles or any other sources.^{73,74,75,76,77} New air pollution standards were set for iron and steel foundries.⁷⁸ The EPA released results of a new study revealing that since 1970, air quality has improved dramatically with concentrations of six major pollutants in emissions (carbon monoxide, lead, nitrogen dioxide, ozone, particulate matter, and sulfur dioxide) decreasing by 48 percent. During that period, the energy consumed increased by 42 percent.^{79,80} Mike Leavitt, Governor of Utah, was nominated by President Bush to replace Christine Todd Whitman as EPA Administrator.⁸¹

The **EPA Environmental Appeals Board** rejected a petition by a private citizen to more intensively review the plans put in place by Alcoa to install NO_x pollution control equipment at their Warrick coal-fired generating plant. The citizen also wanted the company to install carbon monoxide emissions monitors. The EPA board said they did not have the authority to do either of those things.⁸²

A method of removing mercury more easily from power-plant emissions with the use of ultraviolet light is being developed by the DOE National Energy Technology Laboratory (NETL).⁸³ The DOE also awarded grants totaling \$4.2 million to research fuel cell technology.⁸⁴

A federal science panel composed of 13 federal departments and agencies released a strategic plan to research the concept of **global warming**—if it is occurring and if so, what is causing it.⁸⁵ A major concern is that the plan does not include funding.⁸⁶

Governor George Pataki of New York announced a plan to establish, with nine other northeastern states, a **carbon dioxide cap-and-trade program** for power plant emissions.^{87,88} The state lost a federal suit regarding a state law that restricted the **trading of sulfur dioxide (SO₂) emissions** to states like Indiana that they contend continue to send emissions “downwind” to northeastern states.^{89,90}

The Geological Society of America published results of a study that suggests that **changes in the sun's activity** over the past century may be largely responsible for changes in the earth's climate.⁹¹

The results of a study were published in the journal *Nature* stating that increased **carbon dioxide concentrations** in the air are having an impact on the acidity of the earth's oceans. The research was conducted by scientists at the Lawrence Livermore National Laboratory in California.⁹²

Seventeen Indiana counties will likely be non-compliant with **Clean-Air standards** when stricter controls are enforced next spring. The counties are within the metropolitan areas of the cities of Indianapolis, Fort Wayne, South Bend, Gary, Elkhart, and Louisville, Ky.⁹³

A groundbreaking ceremony occurred at the **Wabash River generating station** in preparation for construction of a **fuel cell** as part of a DOE Clean Coal Technology Program demonstration project in association with Kentucky Pioneer Energy, LLC. It will be the largest fuel cell powered by coal ever constructed.^{94,95}

Cinergy was recognized for its environmental program by being added to the Dow Jones list of World Sustainability Indexes. It was the top-ranked U.S. utility on the international list, ranking third amongst all utilities listed.⁹⁶ The company plans to spend \$21 million to cut emissions by 5 percent by the year 2012.^{97,98,99}

Indianapolis is one of 100 cities, nationwide, that now offer daily, **year-round Air Quality Index reports** that include particle pollution data. This information is available to the public from many sources including local television, and web sites such as The Weather Channel (www.weather.com).¹⁰⁰

Indiana University is beginning to make plans for **replacing its power plant** that generates steam only on the Bloomington campus. The plant is outdated and will not meet clean air requirements that go into effect in 2007. The current plant may not be able to meet demands that will be placed upon it by the addition of several new campus buildings that are being planned. It could cost \$200 million to make improvements. The university would like to construct a new plant between 13th Street and the railroad tracks on Walnut Grove Ave.^{101,102}

The **Indiana Division of Reclamation (IDOR)** received the **Mid-Continent Regional Award** for a reclamation project as part of the U.S. Office of Surface Mining 2003 Abandoned Mine Land Reclamation Awards. The IDOR received the award for its part in reclaiming the abandoned Victory mine site near Terre Haute, Indiana. The land has been converted into a community sports complex and wildlife habitat.¹⁰³

Construction industry developments

The **I-69 route** through Perry Township in Marion County was included in the regional transportation plan by the Metropolitan Development Commission.^{104,105} The proposed corridor, as well as a bridge in the Louisville, Ky., area and the Hoosier Heartland highway between Lafayette and Logansport were added to the Indiana State highway map.¹⁰⁶ National Public Radio carried a five-minute segment about the Indiana I-69 controversy.¹⁰⁷ A former Monroe County surveyor released results of a study that states that trips along the proposed Michigan to Texas I-69 extension would take longer than trips currently take on existing interstates.^{108,109}

Two construction companies vied for the opportunity to construct the **two new bridges proposed to cross the Ohio River** in the Louisville, Ky., region. They were Community Transportation Solutions (CTS) and the Michael Baker Corp. Both groups stated that the project could be completed in less than the 17 years allotted for construction and either company would collaborate with a number of other companies to complete the project.¹¹⁰ Presentations by both companies were made to officials of both states.¹¹¹ The Indiana Department of Transportation (INDOT) and the Kentucky Transportation Cabinet chose CTS to manage the project.¹¹² The Federal Highway Administration gave its permission to proceed with the \$1.9 billion project.¹¹³

A study of Federal Highway Administration data reveals that the number of bridges considered deficient in the U.S. has decreased by 18 percent since 1992. About 28 percent of all bridges in the U.S. are still considered to be deficient. The improvement is attributed to an increase in federal funding for bridge repair in recent years.¹¹⁴ A report released by the **American Society of Civil Engineers** studying the nation's infrastructure has found little overall improvement since 2001 when infrastructure was given an overall grade of D+.^{115,116,117,118}

Several **Indiana higher education construction** projects are being planned. Indiana University-Purdue University Indianapolis will build a \$50 million student center.¹¹⁹ The \$31.87 million second multi-disciplinary science building at Indiana University Bloomington, received approval from the Indiana State Budget Committee. Also approved by the committee was a Purdue University \$13 million biomedical engineering building and \$15 million for two projects: one at Indianapolis Ivy Tech State College and the other at Fort Wayne - the Northeast Indiana Innovation Center.^{120,121} A \$30 million library will be built on the University of Southern Indiana campus at Evansville.¹²² And a new housing complex is planned for Rose Hulman Institute of Technology at a projected cost of \$13.5 million.¹²³

More plans for the **Indianapolis Airport's new terminal building** were released and contracts with engineering firms who will create the blueprints were arranged.¹²⁴

Eli Lilly announced plans to expand its pharmaceutical facilities in Indianapolis, spending an estimated \$322 million to do so.¹²⁵

INDOT awarded contracts for several highway and bridge repair jobs. Significant among the awards were \$55 million for design work, added travel lanes, and bridge replacement to a segment of I-80 in Lake County; \$28 million for bridge replacement, added travel lanes and signs on 3 miles of I-90 in Lake County; \$6.9 million for bridge replacement on Fall Creek Road over Geist Reservoir in Hamilton County; and \$4.5 million for added travel lanes and bridge replacement on High School Road over I-70 in Marion County.^{126,127,128} INDOT reduced the number of alternatives from 11 to 4 for upgrading US 31 connecting Plymouth to South Bend to a limited access highway.^{129,130}

Community development plans were approved by **Monroe County Commissioners** for the towns of Ellettsville and Harrodsburg and a new stretch of road connecting Ind.46/S.R. 37 and Curry Pike. Construction would be expected to cost about \$5 million.¹³¹ The Commission gave plat approval for the 49-lot Eagleview II subdivision and for a 10-lot subdivision off Fairfax Road, but denied a petition for 49 lots for another subdivision planned in an area with numerous sinkholes.^{132,133}

A road through a bog in Lake County was constructed on top of environmentally-friendly and inexpensive polystyrene blocks six years ago. Following a thunderstorm in July the bog swelled and the road split down the middle, gapping up to 3 feet wide in some places. the road was closed and may be replaced by a bridge.¹³⁴

A new Wal-Mart Supercenter and Sam's Club will be built in the **Clarksville area**.

Owen Valley High School will be renovated at a cost of \$19 million, site preparation has been completed.¹³⁵

About \$5 million will be spent to **expand AIT Laboratories**, a life sciences company, in Indianapolis.¹³⁶

A new addition is planned for the **Bloomington Convention Center**. Most new building in Bloomington is staying true to the historic flavor of the town with the use of red brick with limestone trim.¹³⁷

Legislation and regulatory issues

Governor Frank O'Bannon suffered a massive stroke and died in September. **Lt. Governor Joe Kernan** is serving out the remainder of Governor O'Bannon's term.^{138,139}

An **appropriations bill** was passed by the Senate and sent to conference committee that provides fiscal year funding for the **U.S. Department of the Interior**. Appropriations totaled \$20 billion with \$1.67 billion for the DOE and \$929 million for the USGS. The USGS budget received \$21 million that had been cut earlier.¹⁴⁰

The **DOE** released a draft of its 2003 Strategic Plan. More details on the plan can be viewed at <http://strategicplan.doe.gov>.¹⁴¹

On September 25, Congress passed a **five-month measure to temporarily extend the Transportation Equity Act (TEA-21)** at a cost of \$14.7 billion for highway programs. TEA-21 expired at the end of September.¹⁴²

The **Senate Finance Committee** introduced legislation (S. 1548) that would put tax receipts for **ethanol** into the Highway Trust Fund. This would increase the fund by about \$1.5 billion annually to start with and \$3 billion annually by 2012.^{143,144}

Funding stopped for the federal **Airport Improvement Program** at the end of September as new funding legislation has not passed.¹⁴⁵

The **federal energy bill passed the Senate** in July.^{146,147} There were further debates about who should pay to clean up the air—the federal government or companies. Both versions of the energy bill include \$2 billion of federal funding for clean coal technology research. The Senate version includes another \$2 billion in tax incentives for the use of clean coal technologies.¹⁴⁸ Differences between the House and Senate versions of the comprehensive energy legislation were being worked out in **conference committee**, but the action was not completed by the end of the quarter.^{149,150,151}

There is some concern that the amount of federal funds likely to be appropriated for the **nation's river lock and dam maintenance and repair** will be insufficient to meet the need. About half of the 194 locks on the Ohio River have been evaluated as needing repair or reconstruction and insufficient for modern barges.¹⁵²

A **water resources bill (HR 2557)** passed the House and was sent to the Senate in September.¹⁵³

Plans are being made to modernize the **National Environmental Policy Act**. Public input on proposals will be gathered.¹⁵⁴

A hearing on the **Toxic Release Inventory** was held by a House subcommittee.¹⁵⁵

The **U.S. Mine Safety and Health Administration (MSHA)** won an appeal in federal court that allows it to continue testing coal dust levels by taking several samples over a single shift as it has historically done. Some mine operators had pressed the agency to take samples over several shifts and average the results.^{156,157,158} MSHA proposed stricter diesel particulate matter limits and announced that it would hold public hearings on the proposed changes.^{159,160,161,162} MSHA and the National Safety Council signed a cooperative agreement designed to decrease the number of deaths and injuries associated with mining. MSHA signed similar agreements with the NSSGA and the Industrial Minerals Association-North America earlier this year.¹⁶³ The agency

is making more information available electronically through its web site and some forms can be submitted through the site. Automatic notifications of agency news can be received through application to an electronic mailing list at <http://www.msha.gov>.¹⁶⁴

The Occupational Safety and Health Administration (OSHA) announced that they would conduct surprise inspections of several mineral-related industries under their jurisdiction, such as block and brick, this year.¹⁶⁵ Their five-year plan states a goal to reduce rates of occupational fatalities and injuries by 15 percent and 20 percent, respectively.¹⁶⁶

The National Institute for Occupational Safety and Health (NIOSH) released a handbook on mine dust control.¹⁶⁷ They also released a report on work-related lung disease that includes information on silicosis.¹⁶⁸

A study of state records on **mine subsidence insurance claims** revealed that the mine subsidence fund only pays on 24 percent of the claims filed.^{169,170}

The Federal Highway Administration visited several states experienced in using **recycled concrete** and plans to prepare a report about its discoveries.¹⁷¹

INDOT opened its new Materials and Testing Building for the **Greenfield District** at Greenfield.¹⁷²

Metals

The **World Trade Organization** ruled that the U.S. failed to prove that the U.S. steel industry was harmed by unfairly subsidized imports prior to the imposition of stiff tariffs and that therefore global trade rules had been violated. The Bush Administration planned to appeal that ruling. The European Union threatened to impose tariffs on imports of U.S. products in retaliation.^{173,174,175}

The results of **two official studies on the effects of the steel tariffs** were released. Interpretation of the results of those studies is under discussion. Steelmakers say that they will not be ready to deal fully with foreign imports until a full three years is over. The President is expected to reach a decision about whether or not to continue the tariffs by the end of the year.^{176,177,178,179,180} Imports of steel were down 21.6 percent in August when compared to the month of July and down 25.2 percent, year-to-date, when compared to last year.¹⁸¹

Steel Dynamics received a new air permit for the Qualitech steel mill that it acquired last year and plans to reopen it next year.¹⁸² The company also announced that its new structural steel mill in Columbia is continuing to show improved shipments and profitability.¹⁸³ An article about modern steelmaking which included discussion of the new Columbia City mill appeared in the Wall Street Journal.¹⁸⁴

International Steel Group (ISG) will exchange its East Chicago pickle line for U.S. Steel Corporation's Gary Works steel plate production facilities.^{185,186} ISG sold its half of BethNova Tube, LLC, Jeffersonville, part of the Bethlehem Steel Corporation acquisition, to Novamerican Steel Inc., which already owned the other half of the company.¹⁸⁷

U.S. Steel Corporation sought approval to sell timber rights on company-owned land to help pay for its underfunded pension plans.¹⁸⁸ The company cut 60 jobs at the National Steel Corp. plant in Portage that it recently acquired and recently cut 77 jobs at the Gary mill. It is requesting early retirement for another 1,200 at that mill.¹⁸⁹ U.S. Steel also reorganized its upper management.¹⁹⁰ The company suffered a smaller-than-expected loss during the second quarter. Part of the loss was due to a planned work stop due to repairs at the Gary Works.^{191,192}

Ispat Inland Inc. made an agreement to make payments to the Pension Benefit Guaranty Corp. to cover pension duties then made partial payment.¹⁹³

A.K. Steel, plagued with financial problems, accepted the resignations of two members of its top management.¹⁹⁴

A technical article about equipment used at **Nucor Corporation** appeared in AISE Steel Technology.¹⁹⁵

Private Power LLC is purchasing six power plants and a coal-injection facility that supply electricity for steel mills in northern Indiana from **NiSource Inc.** for \$335 million.¹⁹⁶

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Indiana Mineral Industry News

4th Quarter 2003

By Kathryn R. Shaffer
Indiana Geological Survey

Production

Indiana **coal production** through the week ended December 27, 2003 was 34.8 million short tons, a less than one percent decrease from 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 that time.¹ Cautious optimism for **Illinois Basin Coal** during 2004 is expressed by one source and it is possible that it could be an outstanding year.² The U.S. DOE issued its Annual Energy Outlook report for 2004 in which it projects that total **U.S. coal consumption** will increase from 1,066 million short tons during 2002 up to 1,567 million short tons in 2025. A higher percentage of coal production (two-thirds by 2025) is expected to come from western states.³

According to the most current data published by the **U.S. Geological Survey (USGS)** for the second quarter of 2003, Indiana **production of crushed stone** was 17.3 million mt and Indiana **production of construction sand and gravel** was 7.5 million mt demonstrating a decrease of 5 percent and an increase of 1 percent for each commodity, respectively, when compared to the same period of 2002.⁴

U.S. demand for **asphalt** is projected by the Fredonia Group, Inc., to grow to 37 million tons of asphalt by the year 2007. This reflects a growth of 1.5 percent per year.⁵ In 2007 the value for that product should reach \$10.8 billion.^{6,7}

The Portland Cement Association reports that the **U.S. Economy** should show improvement during 2004, but significant **improvement in the construction industry** may not occur until 2005. Interest rates are expected to start increasing during 2004.⁸ The **Indiana University (IU) Business Outlook Panel**, composed of IU economists, also believes the U.S. economy will show improvement during 2004, but believe that Indiana will lag behind most states in terms of recovery—primarily due to loss of manufacturing jobs, mostly to foreign countries, and increases in productivity.⁹

Industry news

Alliance Resource Partners was expecting record high earnings for 2003. The company had a net income of \$10.8 million, an increase of 163%, during the third quarter of 2003 when compared to the third quarter of 2002. The company experienced a number of developments,

including the addition of continuous miners to several of its operations, including its Indiana **Gibson County operation**.¹⁰

Horizon Natural Resources is asking their bankruptcy judge for relief from employee pension and health care benefit obligations. The United Mine Workers of America (UMWA) is fighting the request.¹¹ The company asked for extensions to file its reorganization plan and an extension to move its deadline to accept or reject its coal leases until March 1, 2004. It has undertaken a number of moves to improve its financial situation, including selling off property; some undeveloped reserves in Indiana were sold to **Black Beauty Coal Company** and **Triad Mining**.^{12,13,14,15} **Peabody Energy** has expressed an interest in purchasing the Sycamore Mine.¹⁶

The Indiana Railroad Company had added track to better connect **Indianapolis Power and Light (IPL)** to its coal fields.¹⁷

In September, the Monroe County Plan Commission approved rezoning a 47-acre lot to allow for mineral extraction. **American Limestone, Inc.** plans to redevelop an old **dimension limestone** quarry on the property. It is on the site of a quarry closed for 75 years and the proposal received some opposition from local residents.^{18,19,20} Monroe County Commissioners examined the site and then gave final approval in November. The company is based in Atlanta, Ga. and has another operation just south of Stinesville that has been active only a few months.^{21,22}

The St. Meinrad Archabbey has signed an agreement with **Mansfield Stone Company** to form Mansfield-St. Meinrad Stone Inc. The company will mine **dimension sandstone** from the long-inactive **St. Meinrad quarry** on the archabbey property. According to the agreement, the company cannot blast and must remove stone by mechanical means.²³

BUZZI UNICEM S.P.A., as major stockholder in Dyckerhoff AG, made an offer to holders of premium Dyckerhoff stock shares to exchange them for BUZZI UNICEM savings shares.²⁴ Lone Star Industries, Inc., a Dyckerhoff company, is now doing business as **BUZZI UNICEM USA**.²⁵ The international **cement** industry has been greatly impacted in recent years by acquisitions and consolidations.²⁶

The Indiana Department of Environmental Management (IDEM) held a permit hearing to discuss a draft of a Title V permit for **Essroc Cement Corporation's** Speed Plant, the purpose of which is to combine all plant air pollution control requirements into one document.²⁷ The Logansport plant received approval of its Title V permit in December.²⁸

Stonehenge Concrete and Gravel Co. and **James Palmer** received approval for zoning variances in Wayne County for new sand and gravel operations, but still need to receive appropriate environmental permits from IDEM.²⁹

Gohmann Asphalt & Construction, Corydon, received the "Outstanding (hot mix asphalt) Producer for the State in 2003" award from the Indiana Department of Transportation (INDOT). Six other producers received certificates of recognition.³⁰

Environmental issues

The U.S. Environmental Protection Agency (EPA) proposed changing a plan formulated under the Clinton Administration to regulate **mercury emissions** from power plants. The proposed change would establish an emissions credit trading plan for mercury. The proposed plan may be less costly for power producers.³¹ Another plan, also still under consideration at this time, calls for the installation of pollution-control equipment on coal-fired power plants. Comments are being sought on each of these proposed plans.^{32,33,34} The agency also issued a plan to more tightly regulate **sulfur dioxide** and **nitrogen oxides** in 30 states by setting regional limits for those emissions. An **emissions credit trading plan** would be allowed for those pollutants under the plan.^{35,36} By 2015 the cuts would result in a reduction of 70 percent for sulfur dioxide and 50 percent for nitrogen oxides for those states when compared to today's levels. The EPA also reports that mercury levels would be cut by 70 percent from current levels by 2018 if the emissions trading method is selected.³⁷

Coal gasification power plants using integrated gasification combined cycle (IGCC) technology as a means of **reducing mercury, nitrogen oxides, sulfur dioxides, and other air pollutants** were promoted at a coal-industry conference in October. Only two of these plants exist in the U.S. today. One of them is Cinergy's Wabash plant which is fueled with petcoke from a Koch Carbon refinery in Pine Bend, Minnesota, whose contract was recently renewed.³⁸ It costs an estimated \$3,412 to remove a pound of mercury at an IGCC plant, far less than the \$37,800 per pound estimated cost at a pulverized-coal plant.³⁹

In Europe, countries that ratified the **Kyoto Protocol** are preparing for new caps on industries. A few countries are ahead of where they expected to be at this time in terms of overall **greenhouse emissions**, while some countries are as much as 24 percent behind where they had projected that they would be.⁴⁰ **China**, exempt from the Kyoto agreement because it is a developing nation, has been experiencing a rapid growth in greenhouse emissions.⁴¹ It was reported that **Russia** may not ratify the agreement due to expected detrimental effects on the Russian economy and Russian resistance may terminate the Kyoto treaty because the requirement of approval by developed nations responsible for 55 percent of greenhouse emissions would not be achievable.⁴² If Russia does not ratify the treaty, the **European Union** may reconsider its support of the treaty as well.⁴³ It is possible, however, that Russian opposition may be a negotiating tactic to win economic concessions from the European Union.⁴⁴

The increase of **greenhouse gas** in the U.S. is estimated at 0.5 percent for 2002, less than the 2.4 percent in economic growth shown for the same period. It is also less than the 0.9 percent

average annual increase shown in greenhouse emissions since 1990.⁴⁵ Because emissions are at a lower rate than that of economic growth, the **U.S. greenhouse gas intensities** are reported by the General Accounting Office to be falling and the same is also true of eight other countries with major amounts of greenhouse emissions. This trend is projected to last through 2025.⁴⁶ The EPA reports that **voluntary programs** have reduced U.S. emissions by 43 million metric tons during 2002.⁴⁷ In the U.S. efforts to control greenhouse gases have largely been left to the states, some of which have passed laws requiring **diversification of energy production** to include such things as solar and wind. Indiana does not have such legislation.⁴⁸ **Proposed guidelines** for voluntary reporting of greenhouse gas emissions were released by the DOE.⁴⁹ A study by the National Aeronautics and Space Administration (NASA) has suggested that **diesel soot** may also be a major factor, comprising up to one-fourth of all global warming.^{50,51}

A new program called the “**CO₂ Breakthrough Program**” was announced by the **American Iron and Steel Institute**. The organization is accepting research proposals for innovative projects that can help to reduce carbon dioxide emissions produced during steel production. This is part of an **international effort** among steel producers.⁵²

The first **voluntary auction of greenhouse gas emissions** on the **Chicago Climate Exchange** was completed at the end of September. It was considered to be successful and continuous trading of carbon dioxide emissions credits began at the end of October.⁵³ **Christine Todd Whitman**, former director of the EPA, was chosen to lead the Exchange.⁵⁴

A proposal made by the **Portland Cement Association** to change ASTM C150 to allow the addition of no more than **5 percent ground limestone** in portland cement was allowed to move forward to the next level of consideration. The proposed change could help **reduce greenhouse emissions** and would bring U.S. standards in line with European and Canadian standards.^{55,56} A study conducted by the Slag Cement Association has also shown that the use of **slag cement in concrete** production may significantly reduce greenhouse gas emissions.⁵⁷ Cement plants rank second behind coal-fired utilities in the amount of carbon dioxide produced.⁵⁸

The EPA along with the National Institute of Environmental Health Sciences is offering **grants** for studies into the role **particulate matter** may play in cardiovascular disease.⁵⁹

The U.S. DOE will issue a solicitation for project proposals for the next round of the **Clean Coal Power Initiative**.⁶⁰

The **U.S. Public Research Interest Group** released a report called “Lethal Legacy: A comprehensive look at America’s dirtiest power plants,” stating that the Clean Air Act and current policies have done nothing to stop the nation’s oldest power plants from continuing to create more than 98 percent of all emissions. Indiana is listed in the report as among the five top states for SO₂, NO_x, and CO₂ emissions.⁶¹

The Environmental Defense organization also released a report called “Out of control and close to home: **Mercury** pollution from power plants,” about the need for tighter regulation of mercury emissions.⁶²

Twenty-five Indiana counties are not expected to meet **new federal ozone limits** when they go into effect in April. Those counties will have six years to meet the new standards or risk measures that could include a loss of transportation funding or possibly even stricter sanctions.⁶³

Cinergy has asked for a **15 percent rate increase**, partly to help pay for environmental costs. An environmental group opposes the increase and states that it will cost the average household about \$12.00 per month.⁶⁴ A decision on the matter will be made next year.⁶⁵

Three Environmental groups attempted to stop the **Clifty Creek power plant** from continuing to dispose of **coal ash in a landfill**. They also wanted the state to investigate the plant for other possible environmental problems. A court decided that the groups could not file suit against the power plant, stating that **organizations cannot file suit** unless they are themselves in some way aggrieved. In other words, organizations cannot file suits on behalf of some of their members. This may have far-reaching implications for future legal action by these or other groups.⁶⁶

The **U.S. Office of Surface Mining (OSM)** presented its **Excellence in Surface Coal Mining and Reclamation awards** in October at an annual awards ceremony. The **top reclamation award** (the Director’s Award) went to the **Black Beauty Coal Company and United Mineral** co-owned **Deer Ridge Mine** near Selvin. The companies constructed 44 shallow wetlands on 160 acres and 72 permanent impoundments on 246 acres. The project received the award due to its large extent as well as its quality. **Squaw Creek Coal Company, Peabody Energy’s, Squaw Creek Mine** near Chandler won a “National Award.” A Good Neighbor Silver Award was also awarded to the **Cypress Creek coal mine** in Warrick County. The coal company created a wetlands that relieved downstream flooding of farms, roads, and the Boonville waste water treatment plant. The wetlands provides an outdoor recreation area. The mine is operated by Vigo Coal Company.^{67,68,69} The OSM also presented the Indiana Department of Natural Resources, **Division of Reclamation (DOR)**, the Mid-Continent Regional Award for the **Victory Mine** site located near Terre Haute. The DOR reclaimed the property as a wildlife habitat. The award was given at a meeting of the National Association of Abandoned Mine Land Programs.⁷⁰

The **National Stone Sand and Gravel Association** presented its About Face and Community Relations awards for 2003. Two Indiana companies received recognition: **Mulzer Crushed Stone, Inc.’s Newburgh plant** won a Showplace award in the About Face Program and the **Rogers Group, Inc.’s Bloomington Crushed Stone plant** won a Bronze Medallion Community Relations Award.⁷¹

U.S. Aggregates, Inc.’s plant near Noblesville was ordered by the **Department of Natural Resources, Division of Water**, to remove a 20-foot high berm that had been constructed on the White River for flood control. The berm raised water levels upstream causing some flooding there. The company was also ordered to establish plants for erosion control once the berm was removed.⁷²

IDEM released its 2003 **State of the Environment report** which is available online at <http://www.IN.gov/idem/soe2003>.⁷³

Construction industry developments

A public meeting was held in **Bloomington** to discuss whether two **local transportation plans** should be changed to include the proposed **I-69** extension.⁷⁴ Despite some opposition, the proposal was passed.⁷⁵ **INDOT plans to give grants** totaling \$1.5 million to communities and counties along the proposed I-69 extension for planning purposes.^{76,77} The **“Final Environmental Impact Statement”** was completed for the I-69 project.⁷⁸ A \$77 million **environmental mitigation package** was included in the report including, among other things, plans to protect 3 acres of established forest and wetlands for every acre of forest impacted by the highway. For every acre of developing wetlands impacted, however, the state will protect two acres instead of three.⁷⁹ The state is purchasing 1,500 acres of forest from IPL from these funds as part of this plan (see next item). **The next step**, following Federal Highway Administration (FHWA) approval, will be to break the corridor down into **six segments**. The state assures that public comment will continue during the next phase of the project.^{80,81} Aerial surveying was started.⁸²

The 1,500 acres mentioned in the item above are part of 4,000 acres in Morgan County owned by **IPL** on which the company had planned to build an electric power plant.⁸³ The company decided not to go forward with those plans due to changes in the electric utility market. The rest of the land was auctioned off to the public.⁸⁴

Work commenced on the \$300 million **Kingery Expressway interchange** project in Lake County. It consists of improvements to interchanges where the Borman Expressway (I-80/94), Illinois 394, the Tri-State Toll Road, and Bishop Ford Freeway intersect.⁸⁵

Four possible routes are under consideration for a stretch of **U.S. 31** in Howard County. Public input was requested on the proposals.⁸⁶ Three of the routes were modified in consideration of environmental factors and farmland.⁸⁷

The innovative **Hyperfix 65/70** project in Indianapolis last summer received the “Strive for Excellence Team Award,” from the FHWA.⁸⁸

A number of **highway repair contracts** were awarded by INDOT during the quarter, but only two exceeded five million dollars: Affholder, Inc. received a contract for \$7 million for drainage improvements along **SR 66** from Pigeon Creek to **US 41** in Vanderburgh County and Milestone Contractors, L.P. Received a contract for \$5 million for added travel lanes and bridge rehabilitation on **Michigan Road** from 42nd Street to Cold Springs Road in Marion County.^{89,90}

A **large lakefront development**, including a marina, hotel, convention center, and outdoor amphitheater, is planned for the **Gary** area near the casino boats. The proposed development is on the old **Lehigh Portland Cement Company's Buffington Plant** property. Portions of the land has been cleared, but structural beams and girders of two cement plant buildings will be used in new buildings being constructed on the site. The area has had some environmental remediation. The first stage of the project is scheduled to start in the Spring of 2004.⁹¹ The project will be funded with public and private funds.⁹²

A 20-acre area has been designated as a possible site for a **casino in Orange County**. The development also includes plans for construction of a lake to hold a riverboat. Additional land is available in that area for possible further development if needed.⁹³ The site was officially approved for development before the end of the year.⁹⁴

The **University of Notre Dame** plans to build a hotel, a U.S. Post Office, and retail businesses at a cost of about \$450 million.⁹⁵

Proposals for development of the former **Market Square Arena site** in Indianapolis were received and evaluated.⁹⁶ The proposals were narrowed to two possibilities. One plan calls for both residential and retail development on the site to be named The Residence at Market Square and The Shoppes at Market Square. The other plan is for a residential development to be named New Market Square.⁹⁷

Several **museums in Indianapolis** are undergoing renovations: Indianapolis Museum of Art (\$74 million), the **Children's Museum** (\$56 million), and the **Eiteljorg Museum** (\$20 million).⁹⁸ In the planning stages are a renovation of the old IU School of Law building on the Indiana University/Purdue University, Indianapolis (IUPUI) campus into a new site for the **Herron School of Art** (\$26.5 million) and a proposed **African-American Museum** in White River State Park.⁹⁹

The state announced that **Certified Technology Park** status has been designated for an area in **northwestern Indianapolis** that will allow tax money that would normally go to the state to be diverted to that area. The money will allow for infrastructure improvements for the new life sciences research corridor, now called **Biocrossroads**.¹⁰⁰

Completion of the new **Indianapolis Airport terminal construction** project is being **delayed** by 12 to 18 months -- to the end of 2008 -- due to the state of the airline industry. A decision will be

made in the fall of 2004 as to whether to proceed or to delay the project further. Some infrastructure work will continue in the interim.¹⁰¹

A proposal for a 268-acre community called **Simpler Times Village**, designed to resemble a 15th-century Austrian village, was approved for the Greenfield area. The unusual concept envisions housing and shops designed to be within walking distance with a limited number of access roads and parking lots.¹⁰²

The Monroe County Plan Commission approved two requests for **rezoning of land** that had previously been zoned for purposes that would allow quarrying. One parcel of land on **Rockport Road** near Independent Limestone Co. will allow construction of up to 20 homes. The other on **Ketcham Road** will allow construction of up to 36 homes. A company had attempted to develop the latter parcel of land as a quarry several years ago, but stopped after encountering local opposition. County commissioners will also need to approve the zoning change before development can begin.^{103,104} A group is seeking approval to build a new **medical park** southwest of Bloomington in an area with abandoned quarries, but has had some problems gaining approval due to environmental concerns and issues related to the area's history.¹⁰⁵

Up to 480 upper-scale homes could be constructed on 80 acres of property in the Bloomington area known as the **Ramsey Farm**. Also in the plans are apartments, paired homes, and an area for small commercial establishments with some greenspace preservation.¹⁰⁶

A new \$40 million **hospital** will be built in **Warrick County**.¹⁰⁷

A new **mall** will be constructed in **Merrillville**.¹⁰⁸

The **Floyd County Plan Commission** approved a plan to control the development of subdivisions.¹⁰⁹

Legislation and regulatory issues

Agreement was made between the U.S. Senate and House on content of an **omnibus appropriations bill**, but the House had dismissed so the bill could not be finalized before the end of the year. An **extension through January 31** was passed for the interim to hold spending at then current levels. **Transportation** was folded into this legislation.^{110,111}

Congress could not pass **Transportation Equity Act 21 (TEA 21) reauthorization** before the old law expired at the end of September, but approved an **extension that lasts until the end of February**.¹¹² The extension funds highway construction at \$14.7 billion for the period.¹¹³ The Senate and the House each introduced versions of TEA 21 reauthorization. The Senate version

provides funding of \$255 billion over six years and the House version provides \$375 million over six years. The funding would be for highway improvements and transit programs.^{114,115,116} The House version of the bill is called TEA LU – the Transportation Equity Act: A Legacy for Users. TEA LU provides 72 percent over the levels previously appropriated for TEA 21.¹¹⁷

The **Century of Aviation Reauthorization Act**, passed the House and was forwarded to the Senate in November. About \$14 billion is included for the **Airport Improvement Program** over four years. The bill was ready to be sent to the President in December.^{118,119}

The **Energy Bill** was still in conference committee and progress was delayed due to a scheduled Senate recess.^{120,121} Twenty-five members of the U.S. House of Representatives signed a letter requesting that \$320 million in funds that had been appropriated for the DOE Clean Coal Technology program be applied to the **FutureGen** project which is slated to receive \$9 million in federal funds.¹²² The National Mining Association put out a Press Release summarizing provisions of the legislation:

http://www.nma.org/newsroom/latest_pop/releases03/energy_bill_111703.html.¹²³ A **filibuster** occurred in the Senate that prevented passage of the bill in 2003.^{124,125,126,127}

President Bush signed an appropriations bill that includes provision of **\$380 million for coal research** through the DOE.¹²⁸

Michael Leavitt was confirmed by the Senate and became **administrator of the EPA**. He had served as governor of Utah^{129,130,131} The EPA considered defining the term “**isolated waters**” to resolve disputes concerning regulations under the **Clean Water Act**. In January the agency asked for input from the public on the matter. Legislation was also introduced to tighten certain provisions of the Clean Water Act that were eased by the current administration. It would redefine what constitutes **navigable waters**. Some environmentalists are pushing for tighter controls because they believe that isolated waters are not truly isolated because of ground water.¹³² After much consideration of possible ramifications the EPA and U.S. Army Corps of engineers announced in December that they **would not rewrite wetlands rules** as it would decrease the number of acres currently protected by the Clean Water Act.^{133,134} This decision caused the **aggregates industry** some concern.^{135,136}

The final **New Source Review Equipment Replacement rule**, which will allow power plants to make certain repairs to existing equipment without being required to install additional pollution control equipment, was **published in the Federal Register** in October.¹³⁷ The rule, which was scheduled to go into effect at the end of the year, was **stopped by a federal appeals court** while they investigate whether the revision is legal under provisions of the Clean Air Act. It could take several years for them to come to a decision on the matter. The suit was filed predominately by northeastern states. The EPA had already announced that it was **dropping investigations** regarding some utilities.^{138,139,140,141} Several utility companies with lawsuits filed against them by the EPA for violations related to equipment replacement have already settled the claims. At least

one utility, **Cinergy**, is in the process of working out an agreement.¹⁴² The **General Accounting Office** is concerned at how the new rule will affect pending litigation against these companies, as well as other issues.¹⁴³

The **U.S. Mine Safety and Health Administration (MSHA)** completed revisions to its proposed **rule regarding diesel particulate matter** that allows more flexibility and sets somewhat lower standards.^{144,145} A study conducted by MSHA shows that 96 percent of refineries will be ready to produce diesel fuel that will meet clean air requirements for **sulfur** by the year 2006.¹⁴⁶ **The agency was reviewed** by the General Accounting Office following the Quecreek incident and some problem areas involving mine inspection and follow-up were identified by the agency. The report also noted that MSHA should be preparing for the fact that almost half of the agency's underground mine **inspectors will be eligible for retirement** within five years.¹⁴⁷ MSHA awarded a total of \$3.9 million in grants to 13 states for the purpose of **digitizing abandoned underground mines**—Indiana received \$52,000.¹⁴⁸

A new policy has been proposed that would require **peer review of significant regulatory documents** of a scientific nature. Environmentalists have expressed concern over the proposal.¹⁴⁹

A resolution was passed in the U.S. House of Representatives **honoring the National Stone Sand and Gravel Association** for its 100 years of existence.¹⁵⁰

Katherine Davis was named as Indiana's Lieutenant Governor. She had been the state's budget director.¹⁵¹

Metals

Forty-eight steel companies signed a letter addressed to President Bush encouraging him to leave **steel tariffs** in place.¹⁵² The World Trade Organization Appellate Body ruled in November that the President's **Steel 201 Safeguard Program was in violation of international trade rules**.^{153,154} The U.S. was threatened with the possibility of a **trade war** if the tariffs were not stopped.¹⁵⁵ The Steel 201 Safeguard **program was discontinued** in December, 15 months before it was due to expire, but the president pledged to continue enforcing existing trade laws.^{156,157} Steel producing companies may be hurt by the decision, but it will likely be beneficial to manufacturing companies that use steel.¹⁵⁸ **Economic conditions have changed** and there has been much **consolidation in the industry** which may help to counteract possible ill effects from the decision.^{159,160}

Steel Dynamics new **Bar Products Division** mini-mill is expected to begin operations in early 2004 in **Pittsboro** following some modifications to the existing structure. The facility is the **former Qualitech** steel mill. The company has also ramped up production at its **Jeffersonville**

galvanizing facility that it acquired in the Spring and is beginning to gain entrance to new markets with those products. Steel Dynamics is also reaching out to **new markets** with sales of painted products and also with rails for railroad companies.¹⁶¹

Nucor Corporation continued to do well, setting **production records in 2003**. The company's new **Castrip** facility in Crawfordsville continues to operate and contributes to the company's success.¹⁶²

Ispat International N.V. and Nippon Steel Corp. signed a new memorandum of understanding to produce **lighter-weight steel products** for the automotive industry. The two companies co-own I/N Tek (60/40 - Ispat/Nippon) and I/N Kote (50/50).¹⁶³ **Ispat Inland** completed relining and upgrading one of its blast furnaces.¹⁶⁴ Production from the furnace could increase by 772,620 tons/year. Coal use will also increase.¹⁶⁵

Bethlehem Steel Corporation ceased to exist at the end of the year. It was sold to the **International Steel Group, Inc., (ISG)** in May and has been closing its books. It may take up to five years to settle all financial claims against the company. Bethlehem Steel only has \$15 million in assets available to pay retirees who have a total of about \$5 billion in unsettled pension claims. The company would have been 100 years old in 2004.¹⁶⁶ The **Burns Harbor plant** is being successfully assimilated into ISG. Besides a decrease in staff, there have been internal organizational and pay structure changes. The company is considering further **production process consolidation** between its plants. ISG's productivity has increased and they are making plans to go public.^{167,168}

U.S. Steel Corp. suffered some losses in the latter part of the year as it assimilated the acquired **National Steel Corp.** into the company, terminated staff, and **swapped some assets with ISG.**^{169,170} The company closed its **Straightline Source** unit which distributed steel through the internet and by use of the telephone. The unit's purpose was to divert excess steel from the market. No reason was given in the news release for the closing.¹⁷¹

IDEM held **public hearings** regarding two steel companies. One was for **Ispat Inland Inc.** regarding a request to do relining and maintenance work and to install another stove on one of its blast furnaces. This will increase the plant's output of both steel and air pollutants. The other was for renewal of the **U.S. Steel Corporation, Gary Works'** National Pollutant Discharge Elimination System permit. That permit is for the discharge of storm and waste waters.^{172,173}

Republic Engineered Products LLC temporarily closed its plant in October due to financial problems. It emerged from bankruptcy under new ownership and with the name **Republic Engineered Products, Inc.** The company rolls and finishes steel products.^{174,175}

Vincennes Steel, a steel fabricator for bridges, temporarily laid off half of its 71-employee workforce in October reportedly because of a downturn in the industry.¹⁷⁶

There was a fire at **Sanjo Steel**, a steel fabricating plant in Greenwood, that started in an office. Much was salvaged from the fire and it was expected that production would be able to restart quickly.¹⁷⁷

Aluminum dust placed too close to a furnace caused explosions at the **Hayes Lemmerz International** casting plant at Huntington in late October in which one person died and another was seriously injured.¹⁷⁸

The **North Manchester Foundry** closed on Tuesday, December 16, terminating all employees, but reopened on Friday December 19 under new ownership as **Manchester Metals** and began hiring new employees. The former company had financial problems and was unable to work out **contract problems with the union**. The new company is starting up without a union in place.^{179,180}

The **Dalton Foundry** emerged from bankruptcy after entering it August 5.¹⁸¹

The **Bluffton Foundry** was foreclosed on and workers locked out on October 6.¹⁸²

Several **foundry coke producers** were investigated by the Department of Justice for anticompetitive practices. Four executives at the **Indianapolis Citizens Gas & Coke Utility** were fired. The coke plant also produces coke for steel plants.¹⁸³

Ivy Tech received a **\$300,000 state grant to help steelworkers** in northwest Indiana further their education.¹⁸⁴

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