

Trade Association Role & Challenges US

What is NSSGA?

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NSSGA is the National Stone, Sand
& Gravel Association

What is NSSGA?

NSSGA is the national association representing the crushed stone, sand and gravel industries – the aggregates industry

NSSGA member companies -

- Produce more than 90% of the crushed stone
- Produce more than 70 % of the sand and gravel

consumed annually in the US

The Aggregates Industry in the US

- 2004 production
 - More than 3 billion tons (2.86 billion metric tons)
 - Value - \$16 billion
 - Economic multiplier - \$1.58
 - GDP contribution - \$37.5 billion
 - \$1 million in aggregates sales creates 19.5 jobs
- Direct employment in the aggregates industry
 - 115,000 men and women

The Aggregates Industry in the US

- Markets
 - Roads and highways – 40%
 - Residential construction – 20%
 - Commercial construction – 20 %
 - Public works – 20%

What is NSSGA's Role?

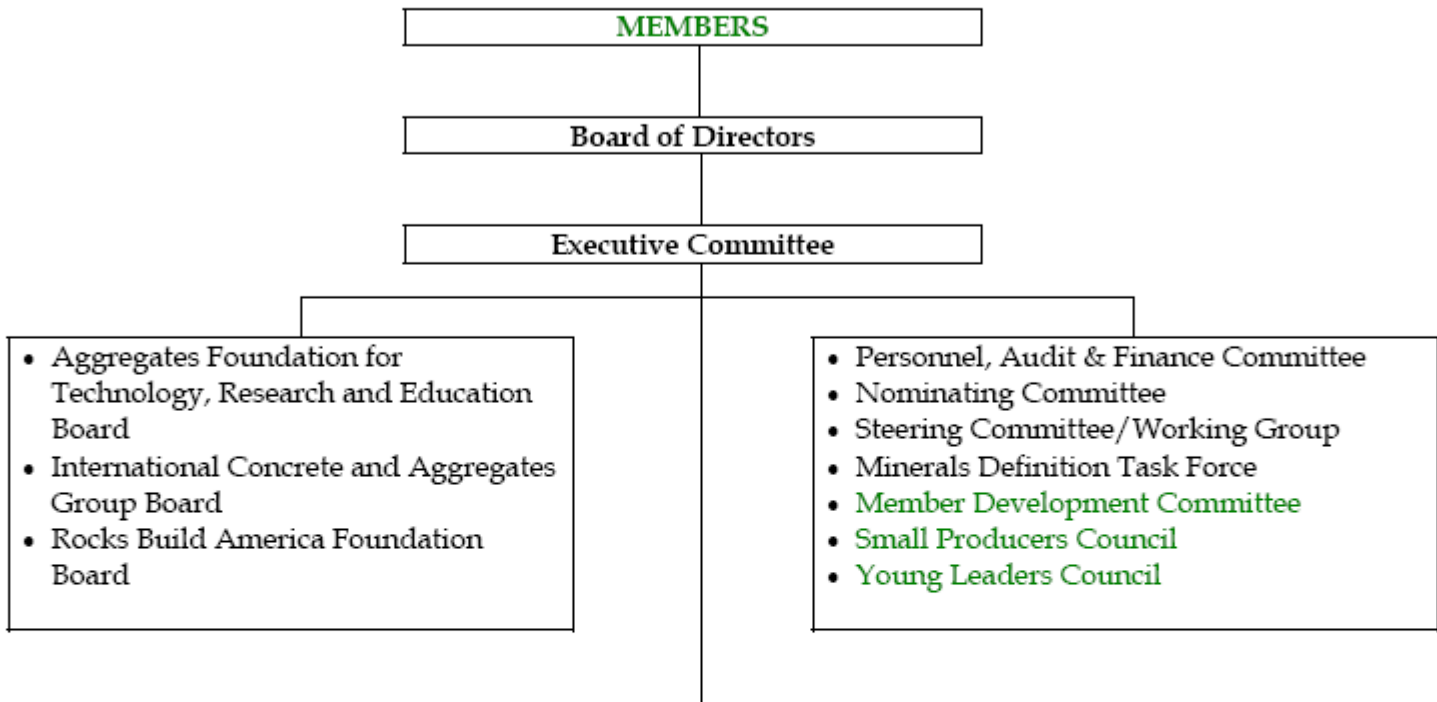
NSSGA's Role

- NSSGA represents the aggregates industry at the national level
- NSSGA provides a place for the aggregates industry to meet and work on issues of mutual interest without triggering antitrust concerns
- NSSGA provides information and produces products and services of value to the aggregates industry

How Does NSSGA Fulfill Its Role?

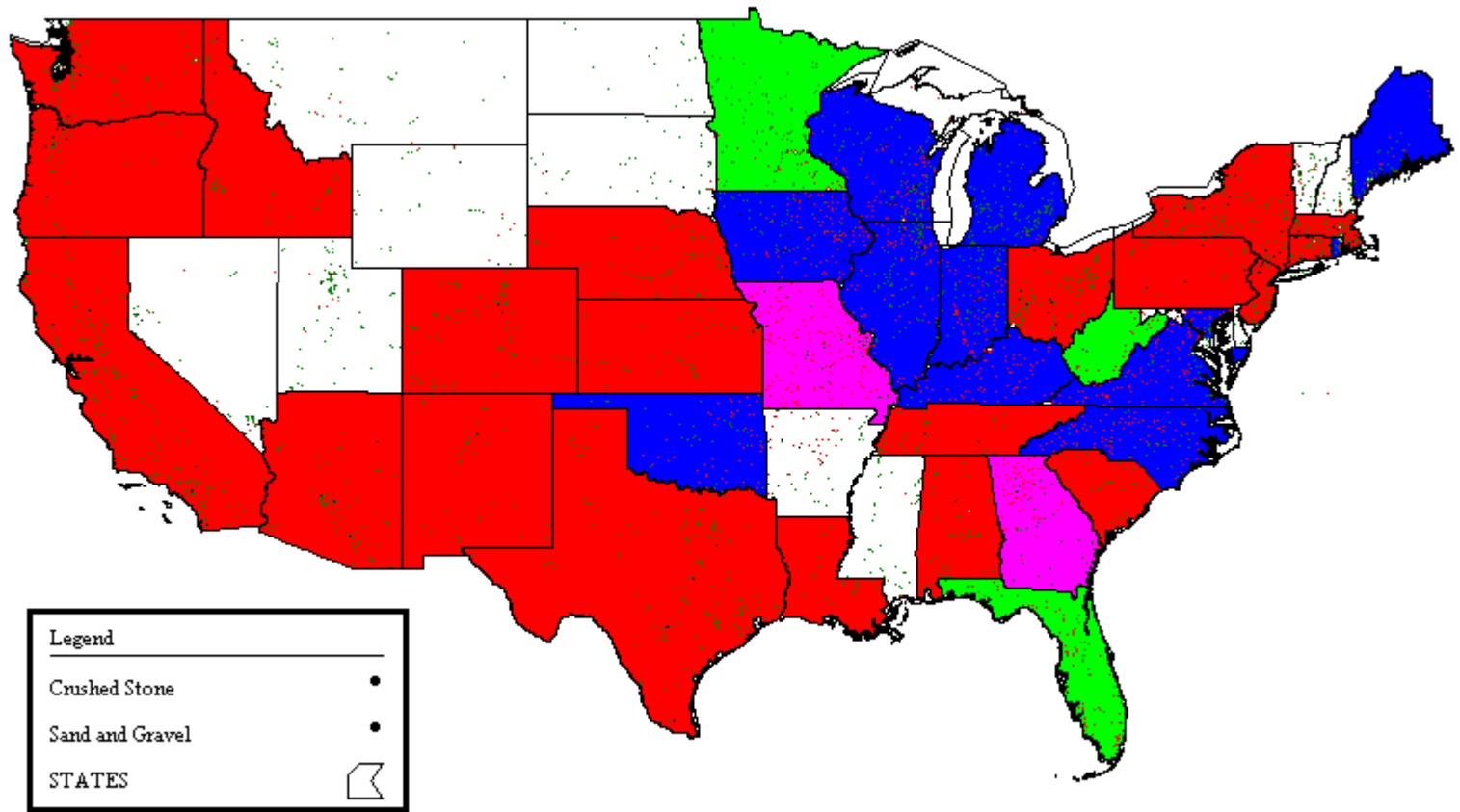
NSSGA Is A Full-Service,
Member-Driven Association

NSSGA Member Organization Chart

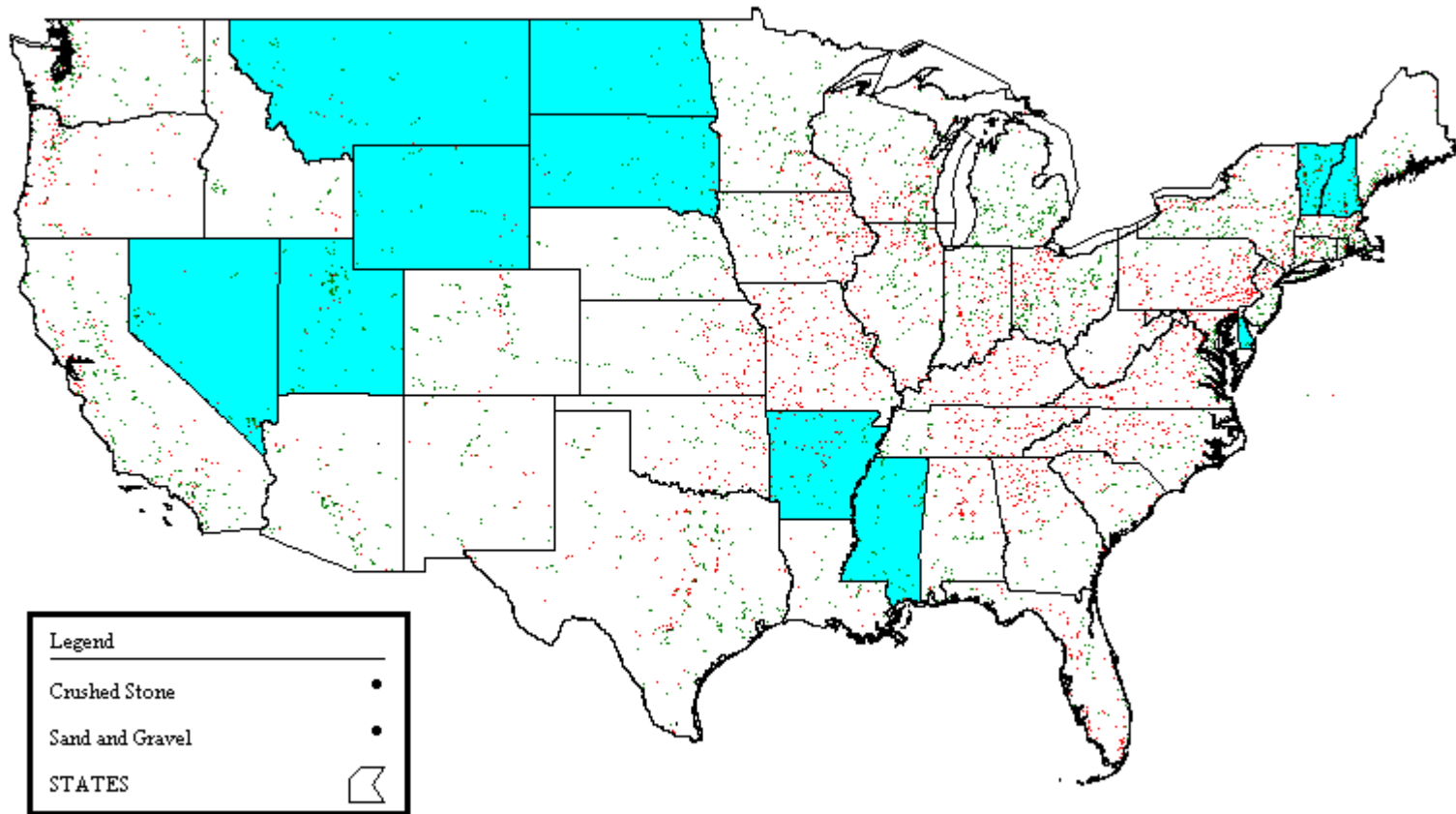


Environment, Safety & Health Division	Government Affairs Division	Communications And Community Relations Division	Market Development Division	Operations Division	M&S Division	Pulverized Minerals Division
Committees <ul style="list-style-type: none"> Council of Counsel Environment Safety & Health 	Committees <ul style="list-style-type: none"> ROCKPAC Board of Trustees Government Affairs Committee 	Committees <ul style="list-style-type: none"> CCR Committee Awards, magazine and newsletter 	Committees <ul style="list-style-type: none"> Aglime & Specialty Uses Marketing, Analysis, Promotion & Training Research, Technical & Product Development Transportation 	Committees <ul style="list-style-type: none"> Aggregate Producers Engineering Group Automation Equipment Management Human Resources Mining & Reclamation Processing 	Committees <ul style="list-style-type: none"> Board of Directors Executive Committee Nominating Committee 	Committees <ul style="list-style-type: none"> Board of Directors Executive Committee Technical Committee

State Aggregate Associations



State Aggregate Associations by Type



States Without An Aggregates Association

Coordination With State Aggregate Associations

- SNAP Task Force – State National Association Partnering
- Listening Tours
- Communication
- Coordination
- Future?

What Challenges Does the NSSGA Face?

Challenges

- Legislation
- Regulation
- Change

Challenges

- Legislation
 - NSSGA Legislative Agenda

Challenges

- Regulation
 - Mine Safety and Health Administration
 - Environmental Protection Agency

Change

- Industry
- Economy
- Communication
- Natural Forces

Conclusion

Challenge = Opportunity