

NATIONAL STONE, SAND & GRAVEL ASSOCIATION



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An Analysis of the National Stone, Sand & Gravel Association Pulverized Minerals Division's 2007 Member Survey

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Executive Summary

In January 2007, the National Stone, Sand & Gravel Association's Pulverized Minerals Division (PMD or "the Division") conducted the second major survey of its members. The purpose of PMD's first survey, conducted in 2005, was to evaluate the industry's political and economic footprint. The purposes of the 2007 survey were to:

- Develop a better understanding of the diverse markets served by the pulverized calcium carbonate industry;
- Determine what factors most affect member costs of doing business;
- Identify legislative and regulatory issues of common concern;
- Determine what members perceive as the most important parts of the PMD value proposition; and
- Identify additional activities the Division could undertake to enhance value to members.

This survey's major findings were as follows:

- Agricultural markets are of greater importance to PMD members than previously recognized. "Animal feed" ranked as the single most important market and "agricultural applications" ranked higher than such previously identified key markets as paints and plastics (Question 1.) PMD may wish to consider working with groups such as the Farm Bureau to encourage the adoption of federal policy to strengthen and protect these market areas.
- PMD members are heavily dependent on roads (even more so than on rail) to transport their products, suggesting that PMD members are being affected by the national highway capacity crisis and that they should consider becoming more active in supporting NSSGA's efforts to increase federal highway investment (Questions 3 and 4.)
- PMD members perceive geopolitical instability and foreign economic competition as two of the greatest challenges facing the nation (Question 6.) The Division should consider more actively supporting public policies that generally enhance U.S. competitiveness (e.g., pro-growth tax and regulatory policies, and increased infrastructure investment), and inviting speakers to future meetings to address foreign affairs topics.
- Of all the various inputs into the manufacturing process, electricity prices have the single greatest impact on PMD member profitability (Question 8.) This confirms the findings of PMD's 2005 survey, which found an almost direct correlation between annual revenues and electricity usage (approximately one kilowatt hour of electricity consumed per dollar of revenue.) PMD should seek out and support specific policy proposals to reduce energy costs and provide incentives for investment in energy-efficient technology.

- PMD members are generally very concerned about the perceived level of arbitrary and inconsistent enforcement by MSHA and EPA (Questions 9 through 12.) The Division should consider working through NSSGA to improve the relationship between regulators and the industry.
- Rising health insurance costs have had a significant impact on PMD members and their employees, with all members reporting that they have had to reduce benefits or ask workers to shoulder more of the costs of health insurance in recent years (Question 21.) PMD should consider more actively supporting legislation to reduce health care costs and improve health insurance availability (e.g., association health plans, medical malpractice reform, electronic medical records, etc.)
- PMD members rank networking as the most important part of the PMD value proposition. At the same time, members recognize the potential value of PMD as a vehicle for collective political action, ranking public policy advocacy as the second most important aspect of the Division (Question 22.)
- PMD members are hungry for the Division to facilitate the development of industry-specific regulatory and legal compliance and training materials (Question 23.)
- On an individual basis, many PMD members have relationships with members of Congress that the Division should consider harnessing to achieve industry-wide policy objectives (Question 27.)

Survey Methodology

PMD's 2007 Government Affairs Survey was developed by Obadal, Filler, MacLeod & Klein, PLC with input from PMD Executive Committee members. The survey was conducted over a one-week period (Jan. 16 through Jan. 23, 2007) using SDI Weblink's online survey system. The official PMD Board representative from each member company was invited to participate in the survey through three e-mails sent over the course of the week. Ultimately, 12 PMD Board members participated in the survey, although not every participant answered every question. Based upon the total sample size (12 respondents) and the total population of potential participants (15 PMD member companies), the survey margin of error is 13 percent.

Survey Analysis

Question 1: On a scale of one to five, how important are the following markets for your company's pulverized calcium carbonate products? ("1" means "not at all," "5" means "very".)

Results (Note: The analysis for this question, and all others involving ranking on a scale of one to five, was derived by adding up the numbers selected for each market for all respondents. For example, if 12 individuals answered the question and five survey respondents answered "1", five answered "3" and two answered "5" that particular market received a 30 (5 x 1) + (5 x 3) + (2 x 5)).

1. Animal feed (37)
2. Plastics (36)
3. Agricultural applications; Industrial applications (water treatment, stack gas scrubbing) (35) (tie)
4. Paint; Paper; Caulks and sealants; Glass and ceramics (32) (tie)
5. Consumer products (decorative chips, line markers, plasters and other cementateous types of products) (30)
6. Household products (cleaners, toothpaste) (29)
7. Carpet backing (27)

8. Foods (for human consumption) (25)
9. Pharmaceuticals (24)
10. Petroleum industry applications (drilling mud) (17)

Analysis: Paint, plastics, paper manufacturing, and many of the other markets that received high rankings have long been acknowledged as important for PMD member products. Perhaps the most surprising revelation from this survey question was the importance of the animal feed and agricultural application markets. PMD may wish to explore opportunities to partner with agricultural groups (such as the Farm Bureau, etc.) to pursue federal policies that expand and protect markets for pulverized calcium carbonate in the farming sector.

Question Two: Please identify any significant uses/markets for your products not included on the list in Question 1 above.

Results:

- PVC pipe manufacture
- Roofing Products
- Asphalt roofing shingles, cultured marble, stucco

Analysis: The two additional markets identified by survey participants (roofing materials and PVC pipe) will be included in future survey market lists to determine how significant they are for the industry as a whole.

Question 3: Which of the following transportation modes does your company use to transport your product?

Results:

1. Road/truck transport (90.91 percent)
2. Rail (63.64 percent)
3. Water (ship, barge, etc.) (27.27 percent)

Analysis: PMD members have in the past identified limited rail capacity as a major challenge facing the industry and the Division has discussed public policy solutions to the problem. However, given the apparently even more important role that roads play in transporting member products, the Division should also consider more actively supporting NSSGA's efforts to increase federal investment in surface transportation infrastructure.

Question 4: What do you believe is the single greatest challenge to your company's continued success? (Please choose one.)

Results (selected from a list of nine options):

1. High transportation costs/limited transportation capacity; excessive government regulation (30 percent) (tie)
2. High liability insurance costs/threat of lawsuit; High health insurance costs; shrinking pool of qualified technically-trained employees; foreign competition and imports (10 percent) (tie)

Analysis: The responses to this question support PMD's past attention to rail capacity issues and give further impetus to PMD's increased involvement in highway issues. The results also suggest that the Division should consider becoming more involved in promoting better regulatory policies, supporting legal

reform and small business health insurance legislation, and undertaking collective workforce development initiatives.

Question 5: If you answered "Other" to Question 4, please specify what you believe is the single greatest challenge to your company's continued success.

Results:

- MSHA and EPA potential excessive over-regulating.

Analysis: See analysis at Question 9 below.

Question 6: What do you believe is the single greatest challenge facing America at this moment in history? (Please choose one.)

Results:

1. Terrorism and geopolitical instability; Economic competition from China, India, and other developing countries (27.27 percent) (tie)
2. National debt (18.18 percent)
3. Deteriorating infrastructure; economic stagnation; other (9.09 percent) (tie)

Analysis: More than 50 percent of PMD members perceive international issues (either terrorism/geopolitical instability or overseas economy competition) to be the most significant challenges facing the nation. The Division should look for opportunities to support public policies that enhance U.S. competitiveness (e.g., through better infrastructure investment, pro-growth tax and regulatory policies, etc.) and consider inviting speakers to future meetings to discuss foreign affairs issues.

Question 7: If you answered "Other" to Question 6, please specify what you believe is the single greatest threat to America at this point in history.

Results:

- Government coercion and intervention. Since the mid-twentieth century, all levels of government have been, and continue to be, greatly expanded. On a daily basis, government bodies (at all levels - federal, state, local) expand their sphere of coercion and develop new rules and regulations with which American industry (and citizens too) must comply. This intervention into the free market system on which America was founded severely restricts the actions of industry and forces (coerces) economic endeavors into models conceived by government elitists, despite more-than-not negative consequences resulting from "good intentioned" intervention. In summary, the infringement of government on ALL aspects of industry (workers comp., safety, environmental, insurance, taxes, wages, etc.) continues, at an ever quickening pace, and is the true fabianistic threat to America.

Analysis: The answer to this question and several others (including the series that begins at Question 9) suggest that PMD members perceive that excessive regulatory activity by EPA, MSHA, and other regulatory agencies is undermining the efficiency of the industry and unnecessarily increasing PMD members' costs of doing business.

Question 8: On a scale of one to five, to what extent is your company's profitability affected by fluctuations in the following? ("1" means "not at all," "5" means "very".)

Results:

1. Electricity prices (39)
2. Natural gas prices (35)
3. Oil prices (34)
4. Gasoline prices (33)
5. Interest rates (28)
6. Coal prices (24)

Analysis: The findings of this question reinforce the findings of PMD's 2005 member survey, viz., that the calcium carbonate production process is highly energy intensive. PMD should redouble efforts to identify legislative proposals that will reduce energy costs and provide incentives for energy efficient investments.

Question 9: Of the following federal regulatory agencies, which has the GREATEST impact on your company's day-to-day operations and efficiency? (Please choose one.)

Results:

1. Mine Safety and Health Administration (54.55 percent)
2. Environmental Protection Agency (45.45 percent)
3. Not selected: Army Corps of Engineers, Department of Transportation/Federal Motor Carrier Safety Administration, Internal Revenue Service

Analysis: MSHA and EPA were universally identified by all PMD's members as the regulatory agencies with the first or second greatest impact on their companies' day-to-day operations and efficiency (See Question 10 below.) PMD should seek to identify and to affect regulatory proposals that will impact members and should identify common regulatory compliance challenges for the Division to address (see answer to Question 23.)

Question 10: If you answered "Other" to Question 9, please specify which federal regulatory agency has the GREATEST impact on your company's day-to-day operations and efficiency.

Results: No answers

Question 11: Of the following federal regulatory agencies, which has the SECOND GREATEST impact on your company's day-to-day operations and efficiency?

Results:

1. Environmental Protection Agency (54.55 percent)
2. Mine Safety & Health Administration (45.45 percent)

Analysis: See analysis for Question 9.

Question 12: If you answered "Other" to Question 11, please specify which federal regulatory agency has the SECOND GREATEST impact on your company's day-to-day operations and efficiency.

Results: No answers

Question 13: What single change in federal environmental policy would most enhance your company's operating efficiency or profitability?

Results:

- Moving from computer model based to reality based emissions control.
- A change away from command-and-control regulations to a free market-based, cap-and-trade system for air quality/emissions compliance would enhance operating efficiency AND profitability.
- Increase compliance for Clean Air Standards.
- Over control of emissions of CaCO₃ into the air, not harmful and not a pollutant (admittedly a nuisance dust in populated area... and emissions of mobile equipment.
- Do not allow states to set higher standards than Federal EPA standards without scientific proof - i.e. they should not be allowed to have lower limits on any air or water discharge just because some environmental group does not think the Federal level is good enough.
- Simplification of modeling.
- Implementation and enforcement of rules requiring coal fired power plants to install pollution control measures.

Analysis: PMD members are clearly interested in influencing emissions-related environmental policy. The Division's leaders should consider what opportunities to do so are presented by the ongoing debates about energy efficiency and global warming.

Question 14: What single change in federal tax policy would most improve your company's operating efficiency or profitability?

Results:

- Tax relief/credits related to energy consumption.
- Unknown.
- Lower tax base with credits for capital dollars spent on expansion projects.
- Increase the depletion allowance.
- Federal income tax rates.
- Extension of inheritance tax relief.

Analysis: PMD members should consider more actively supporting NSSGA's activities related to the depletion allowance. The Division should also look for opportunities to enact tax credits for investment in energy efficient technology.

Question 15: What single change in federal mine safety and health policy would most enhance your company's operating efficiency or profitability?

Results:

- Consistent enforcement and a "working together" attitude.
- Re-evaluate penalty structure.

- Repeal the recent new regulations of increased fines.
- Stop double jurisdiction where for some of our operations both MSHA and OSHA inspect the same facility and in some cases if you do what one agency wants, the next agency comes in for an inspection and says what you did to comply with MSHA (or OSHA) violates the OSHA (or MSHA) regs so you get cited.
- Significant differentiation between underground and above ground mining regulation.
- More practical standards regarding accident reporting.

Analysis: MSHA enforcement issues are clearly of tremendous common concern to PMD members. The Division should consider becoming more involved in NSSGA's activities in the MSHA regulatory arena. PMD may also wish to consider investigating the possibility of a cooperative partnership agreement with MSHA to improve the agency's relationship with the calcium carbonate industry.

Question 16: What single federal program has the most direct impact on the market for your company's calcium carbonate products?

Results:

- EPA
- Laissez faire approach to foreign trade – particularly with the far east.
- Unknown.
- Warning label of crystalline silica content.
- Not sure.
- Tort law reform.
- EPA - requirements for coal combustion emissions control.

Analysis: The purpose of this question was to determine whether there was a specific federal program (like the highway program for the aggregates industry) that has a major impact on the market for PMD member products. The answers suggest that there is not; however, they reinforce the important impact the federal government's activities have on the industry.

Question 17: Did the temporary depreciation bonus created by Congress in 2003 prompt your company to make new capital investments?

Results:

1. Yes (60 percent)
2. I don't know (30 percent)
3. No (10 percent)

Analysis: Although the depreciation bonus has expired, it clearly had an important impact on pulverized calcium carbonate producers. During the next economic slowdown, PMD should consider partnering with other groups to urge the reinstatement of the temporary accelerated depreciation law.

Question 18: Has your company ever claimed the federal research and development tax credit?

Results:

1. No; I don't know (40 percent) (tie)
2. Yes (20 percent)

Analysis: The purpose of this question was to determine the significance of the R&D tax credit (and the annual effort to extend it) for PMD members. It is apparently of little consequence for the vast majority of members at this time.

Question 19: Is one or more of your facilities unionized?

Results:

1. Yes (72.73 percent)
2. No (27.27 percent)

Analysis: The purpose of this question was to gauge the level of union activity in the industry. Apparently, close to three-quarters of PMD members have unionized facilities. This information may prove helpful in the future if the Democratic Congress begins consideration of new labor laws.

Question 20: Have any of your company's calcium carbonate facilities had a fatal accident in the last twelve months?

Results:

1. No (100 percent)

Analysis: The responses to this question suggest that the calcium carbonate industry is relatively safe compared to other mining industries. This information may prove useful in helping PMD members differentiate themselves for purposes of MSHA enforcement.

Question 21: Have increased health insurance costs in recent years caused your company to reduce employee insurance benefits or require employees to pay a greater portion of their health insurance costs?

Results:

1. Yes (100 percent)

Analysis: Increased health insurance costs have clearly taken a toll on PMD members and their employees. PMD should consider supporting efforts to enact legislation to reduce health insurance costs (e.g., association health plans, medical malpractice reform, electronic medical records, etc.)

Question 22: On a scale of one to five, how important do you consider the following parts of the PMD value proposition? ("1" means "not at all", "5" means "very".)

Results:

1. Networking with industry colleagues (45)
2. Public policy advocacy (41)
3. Industry-specific educational programs and best practices sharing (37)
4. Standards and testing methods development (34)

Analysis: There is strong consensus that industry-specific networking opportunities are an important part of the PMD value proposition. Staff will use this information in developing future Division programming. Additionally, the high value assigned to public policy activities bodes well for the Division's future efforts to become more politically involved. If the Division becomes more active in developing educational, legal, and regulatory compliance materials for members, members will likely perceive additional value in the Division.

Question 23: Please select each of the following areas in which you believe PMD should consider enhancing its activities.

Results:

1. Industry-specific regulatory compliance materials (72.73 percent)
2. Industry-specific training programs; Industry-specific legal guidance materials (54.54 percent) (tie)
3. Industry-specific public relations materials (45.45 percent)
4. Outreach to customer industry groups; Outreach to other industry groups at the international level (18.18 percent) (tie)

Analysis: There is a clear interest among the Division's leaders for PMD to become more active in developing industry-specific regulatory (and, to a slightly lesser extent legal and training) materials. The Board should consider choosing a specific regulatory topic and directing staff to identify an outside contractor to develop guidance material for PMD members. The cost of the project could be borne by a special assessment of the membership.

Question 24: If you selected "other" for Question 24 above, please specify the program area(s) in which you would like to see PMD more active. You may also use this space to elaborate on your results to Question 24.

Results: No answers

Question 25: To what trade associations other than NSSGA does your company belong?

1. Local Chamber of Commerce (72.73 percent)
2. Industrial Minerals Association – North America; National Paint and Coatings Association; National Mining Association; Other (please specify) (27.27 percent) (tie)
3. National Association of Manufacturers; U.S. Chamber of Commerce (9.09 percent) (tie)

Analysis: Many PMD members are actively involved in local chambers of commerce; however, from a national standpoint, NSSGA clearly remains the most significant organization for the industry.

Question 26: If you selected other at Question 25 above, please specify the other association(s) or trade group(s) to which your company belongs.

Results:

- Not sure what other associations they belong to.
- Colorado Rock Products Association, Colorado Contractors Association.
- TAPPI.
- State Manufacturers and Commerce.

Question 27: Has your company ever hosted a visit by a federal elected official (congressman, senator, or president)?

Results:

1. Yes (80 percent)
2. No (20 percent)

Analysis: In many cases, PMD members are apparently individually politically active. The Division should look for opportunities to channel member activism towards industry-specific goals while taking advantage of existing relationships with lawmakers.

Question 28: Did you vote for the Democratic, Republican, or Independent candidate(s) in the 2006 congressional elections?

Results:

1. Republican (45.45 percent)
2. I split my ticket (voted for a House candidate from one party and Senate candidate from another party) (27.27 percent)
3. Democrat (18.18 percent)
4. I did not vote in the 2006 congressional elections (9.09 percent)
5. Independent/other (0 percent)

Analysis: PMD members lean strongly Republican (see Question 29), but their voting in the 2006 congressional elections was apparently in keeping with national trends favoring Democrats.

Question 29: Do you generally consider yourself a Democrat, a Republican, or an Independent?

Results:

1. Republican (63.64 percent)
2. Democrat; Independent/other (18.18 percent) (tie)

Analysis: See answer to Question 28.

Question 30: Please choose the statement that most closely reflects your thinking about the 110th Congress.

Results:

1. While the consequences of Democratic control of Congress may not be totally negative for the nation as a whole, there is definitely an increased risk of new anti-business environmental, labor, and tax laws. (63.64 percent)
2. Because the president and Congress should act as a check and balance on one another, a Democratic Congress (and divided government in general) is a good thing for the nation (36.36 percent)
3. On the whole, Democratic control of Congress will be good for national security, the U.S. economy, and the business community; Democratic control of Congress puts national security and the U.S. economy at risk; I am ambivalent about the new Congress and its meaning for the nation (0 percent) (tie)

Analysis: PMD members generally perceive risks and challenges with the Democrat Congress; however, they also apparently believe that the consequences of Democratic control or divided government will not be universally negative for the country.

Question 31: Whom would you most like to see elected president of the United States in 2008?

Results:

- Rudy Giuliani
- Anybody but Hillary
- A Democrat - if they can find a decent candidate
- Romney
- McCain
- Undecided but definitely a republican.
- Joe Biden
- No Clue
- John McCain

Analysis: The responses to this question given by PMD members apparently reflects the lack of national consensus about '08 presidential candidates. The only candidate who received more than one mention was Sen. John McCain (R-AZ).

Question 32: Please use this space to identify other things that PMD can or should do to enhance the profitability and operating efficiency of our member companies.

Results:

- Continued activity/lobbying on the Hill for PMD issues.
- Invite members to participate on meeting with senators, congress, and committees in conjunction with NSSGA.

Analysis: The answers reinforce the conclusion that members support the Division's enhanced focus on public policy issues.

Conclusion

Taken as a whole, the survey results paint a picture of a politically maturing industry. PMD's leaders are increasingly conscious of the impact that federal laws and regulations have on their industry's efficiency and markets. Just as importantly, PMD Board members recognize that the Division can be an important vehicle for collective action in many areas, including public policy, professional development, and industry education. We look forward to continuing to work with PMD to enhance the visibility and political impact of the calcium carbonate industry, as well as the value of the Division to its own members.

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Question 1

On a scale of one to five, how important are the following markets for your company's pulverized calcium carbonate products? ("1" means "not at all," "5" means "very".)

Paint			
Response	Count	Percent	Chart
1	2	18.18%	
2	2	18.18%	
3	2	18.18%	
4	0	0.00%	
5	4	36.36%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.20			

Paper			
Response	Count	Percent	Chart
1	4	36.36%	
2	0	0.00%	
3	1	9.09%	
4	0	0.00%	
5	5	45.45%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.20			

Plastics			
Response	Count	Percent	Chart
1	2	18.18%	
2	0	0.00%	
3	2	18.18%	
4	2	18.18%	
5	4	36.36%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.60			

Pharmaceuticals			
Response	Count	Percent	Chart
1	3	27.27%	
2	4	36.36%	
3	1	9.09%	
4	0	0.00%	
5	2	18.18%	

No answer	2	18.18%	
Total	12	100.00%	
Average Response: 2.40			

Foods (for human consumption)			
Response	Count	Percent	Chart
1	6	54.55%	
2	0	0.00%	
3	0	0.00%	
4	1	9.09%	
5	3	27.27%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 2.50			

Carpet backing			
Response	Count	Percent	Chart
1	4	36.36%	
2	2	18.18%	
3	0	0.00%	
4	1	9.09%	
5	3	27.27%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 2.70			

Household products (cleaners, toothpaste, etc.)			
Response	Count	Percent	Chart
1	2	18.18%	
2	1	9.09%	
3	5	45.45%	
4	0	0.00%	
5	2	18.18%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 2.90			

Caulks & sealants			
Response	Count	Percent	Chart
1	1	9.09%	
2	2	18.18%	
3	3	27.27%	
4	2	18.18%	
5	2	18.18%	
No answer	2	18.18%	

Total	12	100.00%
Average Response: 3.20		

Glass & ceramics			
Response	Count	Percent	Chart
1	1	9.09%	
2	3	27.27%	
3	2	18.18%	
4	1	9.09%	
5	3	27.27%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.20			

Industrial applications (water treatment, stack gas scrubbing)			
Response	Count	Percent	Chart
1	2	18.18%	
2	0	0.00%	
3	3	27.27%	
4	1	9.09%	
5	4	36.36%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.50			

Animal feed			
Response	Count	Percent	Chart
1	1	9.09%	
2	1	9.09%	
3	2	18.18%	
4	2	18.18%	
5	4	36.36%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.70			

Agricultural applications			
Response	Count	Percent	Chart
1	1	9.09%	
2	2	18.18%	
3	2	18.18%	
4	1	9.09%	
5	4	36.36%	
No answer	2	18.18%	
Total	12	100.00%	

Average Response: 3.50

Petroleum industry applications (drilling mud)			
Response	Count	Percent	Chart
1	4	36.36%	
2	4	36.36%	
3	0	0.00%	
4	0	0.00%	
5	1	9.09%	
No answer	3	27.27%	
Total	12	100.00%	
Average Response: 1.89			

Consumer products (decorative chips, line markers, plasters and other cementateous types of products)			
Response	Count	Percent	Chart
1	1	9.09%	
2	2	18.18%	
3	5	45.45%	
4	0	0.00%	
5	2	18.18%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.00			

Question 2
Please identify any significant uses/markets for your products not included on the list in Question 1 above.

Number	Response ID	Response
1	3627	PVC pipe manufacture
2	3629	Roofing Products
3	3630	asphalt roofing shingles, cultured marble, stucco

Question 3

Which of the following transportation modes does your company use to transport your product?

Response	Count	Percent	Chart
Rail	7	63.64%	
Road/truck transport	10	90.91%	
Water (ship, barge, etc.)	3	27.27%	

Question 4

What do you believe is the single greatest challenge to your company's continued success? (Please choose one.)

Response	Count	Percent	Chart
High health insurance costs	1	9.09%	
High liability insurance costs/threat of product liability lawsuits	1	9.09%	
Unstable market for pulverized calcium carbonate	0	0.00%	
High federal taxes	0	0.00%	
High transportation costs/limited transportation capacity	3	27.27%	
Excessive government regulation	3	27.27%	
Shrinking pool of qualified technically-trained employees	1	9.09%	
Foreign competition and imports	1	9.09%	
Other (please specify below)	0	0.00%	
No answer	2	18.18%	
Total	12	100.00%	

Question 5

If you answered "Other" to Question 4, please specify what you believe is the single greatest challenge to your company's continued success.

Number	Response ID	Response
1	3630	MSHA and EPA potential excessive over-regulating.

Question 6

What do you believe is the single greatest challenge facing America at this moment in history? (Please choose one.)

Response	Count	Percent	Chart
National debt	2	18.18%	
Terrorism and geopolitical instability	3	27.27%	
Social Security's future insolvency	0	0.00%	
Deteriorating infrastructure	1	9.09%	
Economic stagnation	1	9.09%	
Economic competition from China, India, and other developing economies	3	27.27%	
Threat of global warming	0	0.00%	
Healthcare crisis	0	0.00%	
Government corruption	0	0.00%	
Global health epidemics (e.g., bird flu, SARS, AIDS, etc.)	0	0.00%	
Other (please specify below)	1	9.09%	
No answer	1	9.09%	
Total	12	100.00%	

Question 7

If you answered "Other" to Question 6, please specify what you believe is the single greatest threat to America at this point in history.

Number	Response ID	Response
1	3626	Government coersion and intervention. Since the mid-twentieth century, all levels of government have been, and continue to be, greatly expanded. On a daily basis, government bodies (at all levels - federal, state, local) expand their sphere of coersion and develop new rules and regulations with which American industry (and citizens too) must comply. This intervention into the free market system on which America was founded severely restricts the actions of industry and forces (coerces) economic endeavors into models conceived by government elitists, despite more-than-not negative consequences resulting from "good intentioned" intervention. In summary, the infringement of government on ALL aspects of industry (workers comp., safety, environmental, insurance, taxes, wages, etc.) continues, at an ever quickening pace, and is the true fabianistic threat to America.

Question 8

On a scale of one to five, to what extent is your company's profitability affected by fluctuations in the following? ("1" means "not at all," "5" means "very".)

Electricity prices			
Response	Count	Percent	Chart
1	0	0.00%	
2	1	9.09%	
3	3	27.27%	
4	2	18.18%	
5	4	36.36%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.90			

Natural gas prices			
Response	Count	Percent	Chart
1	3	27.27%	
2	0	0.00%	
3	0	0.00%	
4	3	27.27%	
5	4	36.36%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.50			

Gasoline prices			
Response	Count	Percent	Chart
1	0	0.00%	
2	2	18.18%	
3	5	45.45%	
4	1	9.09%	
5	2	18.18%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.30			

Coal prices			
Response	Count	Percent	Chart
1	4	36.36%	
2	2	18.18%	
3	1	9.09%	
4	2	18.18%	
5	1	9.09%	
No answer	2	18.18%	

Total	12	100.00%
Average Response: 2.40		

Oil prices			
Response	Count	Percent	Chart
1	2	18.18%	
2	1	9.09%	
3	1	9.09%	
4	3	27.27%	
5	3	27.27%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.40			

Interest rates			
Response	Count	Percent	Chart
1	1	9.09%	
2	3	27.27%	
3	3	27.27%	
4	3	27.27%	
5	0	0.00%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 2.80			

Question 9

Of the following federal regulatory agencies, which has the GREATEST impact on your company's day-to-day operations and efficiency? (Please choose one.)

Response	Count	Percent	Chart
Mine Safety & Health Administration	6	54.55%	
Environmental Protection Agency	5	45.45%	
Army Corps of Engineers	0	0.00%	
Internal Revenue Service	0	0.00%	
Department of Transportation/Federal Motor Carrier Safety Administration	0	0.00%	
Other (please specify below)	0	0.00%	
No answer	1	9.09%	
Total	12	100.00%	

Question 10

If you answered "Other" to Question 9, please specify which federal regulatory agency has the GREATEST impact on your company's day-to-day operations and efficiency.

Number	Response ID	Response
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Question 11

Of the following federal regulatory agencies, which has the **SECOND GREATEST** impact on your company's day-to-day operations and efficiency?

Response	Count	Percent	Chart
Mine Safety & Health Administration	5	45.45%	
Environmental Protection Agency	6	54.55%	
Army Corps of Engineers	0	0.00%	
Internal Revenue Service	0	0.00%	
Department of Transportation/Federal Motor Carrier Safety Administration	0	0.00%	
Other (please specify below)	0	0.00%	
No answer	1	9.09%	
Total	12	100.00%	

Question 12

If you answered "Other" to Question 11, please specify which federal regulatory agency has the **SECOND GREATEST** impact on your company's day-to-day operations and efficiency.

Number	Response ID	Response
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Question 13

What single change in federal environmental policy would most enhance your company's operating efficiency or profitability?

Number	Response ID	Response
1	3625	moving from computer model based to reality based emmissions control.
2	3626	A change away from command-and-control regulations to a free market-based, cap-and-trade system for air quality / emissions compliance would enhance operating efficiency AND profitability.
3	3629	Increase compliance for Clean Air Standards.
4	3630	over control of emissions of CaCO3 into the air, not harmful and not a pollutant(admittantly a nuiance dust in populated area... and emissions of mobile equipment.
5	3631	Do not allow states to set higher standards that Federal EPA standards without scientific proof - i.e. they should not be allowed to have lower limits on any air or water discharge just because some environmental group does not think the Federal level is good enough
6	3632	simplification of modeling
7	3633	Implementation and enforcement of rules requiring coal fired power plants to install pollution control measures.

Question 14

What single change in federal tax policy would most improve your company's operating efficiency or profitability?

Number	Response ID	Response
1	3627	Tax relief/credits related to energy consumption.
2	3629	Unknown.
3	3630	lower tax base with credits for capital dollars spent on expansion projects.
4	3631	Increase the depletion allowance
5	3632	federal income tax rates
6	3633	Extension of inheritance tax relief.

Question 15

What single change in federal mine safety and health policy would most enhance your company's operating efficiency or profitability?

Number	Response ID	Response
1	3625	consistant enforcement and a "working together" attitude.
2	3629	Re-evaluate penalty structure.
3	3630	repeal the recent new regulations of increased fines.
4	3631	stop double jurisdiction where for some of our operations both MSHA and OSHA inspect the same facility and in some cases if you do what one agency wants, the next agency comes in for an inspection and says what you did to comply with MSHA (or OSHA) violates the OSHA (or MSHA) regs so you get cited.
5	3632	significant differentiation between underground and above ground mining regualtion
6	3633	More practical standards regarding accident reporting.

Question 16

What single federal program has the most direct impact on the market for your company's calcium carbonate products?

Number	Response ID	Response
1	3625	epa
2	3627	laisse faire approach to foreign trade - particularly with the far east
3	3629	Unknown
4	3630	warning label of crystalline silica content
5	3631	Not sure
6	3632	Tort law reform
7	3633	EPA - requirements for coal combustion emissions control.

Question 17

Did the temporary depreciation bonus created by Congress in 2003 prompt your company to make new capital investments?

Response	Count	Percent	Chart
Yes	6	54.55%	
No	1	9.09%	
I don't know	3	27.27%	
No answer	2	18.18%	
Total	12	100.00%	

Question 18

Has your company ever claimed the federal research and development tax credit?

Response	Count	Percent	Chart
Yes	2	18.18%	
No	4	36.36%	
I don't know	4	36.36%	
No answer	2	18.18%	
Total	12	100.00%	

Question 19
Is one or more of your facilities unionized?

Response	Count	Percent	Chart
Yes	8	72.73%	
No	3	27.27%	
I don't know	0	0.00%	
No answer	1	9.09%	
Total	12	100.00%	

Question 20
Have any of your company's calcium carbonate facilities had a fatal accident in the last twelve months?

Response	Count	Percent	Chart
Yes	0	0.00%	
No	10	90.91%	
I don't know	0	0.00%	
No answer	2	18.18%	
Total	12	100.00%	

Question 21
Have increased health insurance costs in recent years caused your company to reduce employee insurance benefits or require employees to pay a greater portion of their health insurance costs?

Response	Count	Percent	Chart
Yes	10	90.91%	
No	0	0.00%	
Our company does not provide health insurance for employees.	0	0.00%	
No answer	2	18.18%	
Total	12	100.00%	

Question 22

On a scale of one to five, how important do you consider the following parts of the PMD value proposition? ("1" means "not at all", "5" means "very".)

Networking with industry colleagues			
Response	Count	Percent	Chart
1	0	0.00%	
2	1	9.09%	
3	0	0.00%	
4	2	18.18%	
5	7	63.64%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 4.50			

Public policy advocacy			
Response	Count	Percent	Chart
1	1	9.09%	
2	0	0.00%	
3	1	9.09%	
4	3	27.27%	
5	5	45.45%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 4.10			

Standards and testing methods development			
Response	Count	Percent	Chart
1	0	0.00%	
2	1	9.09%	
3	4	36.36%	
4	5	45.45%	
5	0	0.00%	
No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.40			

Industry-specific educational programs and best practices sharing			
Response	Count	Percent	Chart
1	0	0.00%	
2	1	9.09%	
3	4	36.36%	
4	2	18.18%	
5	3	27.27%	

No answer	2	18.18%	
Total	12	100.00%	
Average Response: 3.70			

Question 23

Please select each of the following areas in which you believe PMD should consider enhancing its activities.

Response	Count	Percent	Chart
Industry-specific training programs	6	54.55%	
Industry-specific regulatory compliance materials	8	72.73%	
Industry-specific legal guidance materials	6	54.55%	
Industry-specific public relations materials	5	45.45%	
Outreach to customer industry groups	2	18.18%	
Outreach to other industry groups at the international level	2	18.18%	
Other (please specify)	0	0.00%	

Question 24

If you selected "other" for Question 24 above, please specify the program area(s) in which you would like to see PMD more active. You may also use this space to elaborate on your response to Question 24.

Number	Response ID	Response

Question 25

To what trade associations other than NSSGA does your company belong?

Response	Count	Percent	Chart
Industrial Minerals Association – North America	3	27.27%	
National Association of Manufacturers	1	9.09%	
U.S. Chamber of Commerce	1	9.09%	
Local Chamber of Commerce	8	72.73%	
American Plastics Council	0	0.00%	
National Paint and Coatings Association	3	27.27%	
National Mining Association	3	27.27%	
Other (please specify)	3	27.27%	

Question 26

If you selected other at Question 25 above, please specify the other association(s) or trade group(s) to which your company belongs.

Number	Response ID	Response
1	3628	Not sure what other associations they belong to.
2	3629	Colorado Rock Products Association, Colorado Contractors Association
3	3631	TAPPI
4	3632	State Manufacturers and Commerce

Question 27

Has your company ever hosted a visit by a federal elected official (congressman, senator, or president)?

Response	Count	Percent	Chart
Yes	8	72.73%	
No	2	18.18%	
No answer	2	16.67%	
Total	12	100.00%	

Question 28

Did you vote for the Democratic, Republican, or Independent candidate(s) in the 2006 congressional elections?

Response	Count	Percent	Chart
Republican	5	45.45%	
Democrat	2	18.18%	
Independent/other	0	0.00%	
I split my ticket (voted for a House candidate from one party and Senate candidate from another party)	3	27.27%	
I did not vote in the 2006 congressional elections	1	9.09%	
No answer	1	9.09%	
Total	12	100.00%	

Question 29

Do you generally consider yourself a Democrat, a Republican, or an Independent?

Response	Count	Percent	Chart
Republican	7	63.64%	
Democrat	2	18.18%	
Independent/other	2	18.18%	
No answer	1	9.09%	
Total	12	100.00%	

Question 30

Please choose the statement that most closely reflects your thinking about the 110th Congress.

Response	Count	Percent	Chart
Democratic control of Congress puts national security and the U.S. economy at risk.	0	0.00%	
While the consequences of Democratic control of Congress may not be totally negative for the nation as a whole, there is definitely an increased risk of new anti-business environmental, labor, and tax laws.	7	63.64%	
I am ambivalent about the new Congress and its meaning for the nation.	0	0.00%	
Because the president and Congress should act as a check and balance on one another, a Democratic Congress (and divided government in general) is a good thing for the nation.	4	36.36%	
On the whole, Democratic control of Congress will be good for national security, the U.S. economy, and the business community.	0	0.00%	
No answer	1	9.09%	
Total	12	100.00%	

Question 31

Whom would you most like to see elected president of the United States in 2008?

Number	Response ID	Response
1	3624	Rudy Guillian
2	3625	anybody but hillary.
3	3627	a Democrat - if they can find a decent candidate
4	3628	Romney
5	3629	McCain
6	3630	undecided but definitely a republican.
7	3631	Joe Biden
8	3632	No Clue
9	3633	John McCain

Question 32

Please use this space to identify other things that PMD can or should do to enhance the profitability and operating efficiency of our member companies.

Number	Response ID	Response
1	3627	Continued activity/lobbying on the Hill for PMD issues.
2	3630	invite members to participate on meeting with senators, congress, and committees in conjunction with NSSGA

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