

PROGRAM GUIDE

January 30–31, 2025

The Wigwam | Phoenix, AZ

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WELCOME TO THE 2025 PIT & QUARRY ROUNDTABLE & CONFERENCE!

hank you for joining us at The Wigwam for our annual event.

We'd like to give a special thank you to our sponsors, whose support allows us to continue this exchange of information and knowledge and share it with the aggregate industry.

Over the course of our event, you will hear from leaders who have a wealth of experience and expertise from a variety of markets throughout the U.S. and Canada. These leaders include aggregate producers, equipment manufacturers and dealers, service providers and association representatives.

We hope you find this year's *Pit & Quarry* Roundtable & Conference to be thought-provoking, enlightening and engaging while providing you with networking opportunities that offer value now and into the future. Thank you again for attending.

Alt C. Julp

Rob Fulop Publisher Pit & Quarry



PUBLISHER

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ICAST

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AGENDA

Thursday, January 30

8:00-9:00 AM	Golf Breakfast
9:00 AM	Golf Outing
	Golf Outing Sponsored by GEOLOGIC
5:00-7:00 PM	Welcome Reception
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Friday, January 31

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VDG Pan der Graaf
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NSSGA
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Ogletree Deakins
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Sachem East

Dress:

Golf: Polo or golf shirt with Bermuda shorts or slacksWelcome reception: Business casualRoundtable: Business casual or formal (jackets), as photos will be published in the magazine



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2025 Roundtable Topics

Thank you for attending this year's *Pit* & *Quarry* Roundtable & Conference. Please note that no transcripts will be sent out for review before publishing. If you would like to say something off the record, please indicate as such before making your comment. Also, please be sure to state your full name before speaking so our stenographer can accurately capture your information.

2024 REFLECTION

For producers:

- Tell us about your aggregate sales in 2024. How did they compare with the previous year? How did production volumes trend, and what impact did weather have? Also, did your company mix in any new products?
- Were you able to capitalize on opportunities provided by the Infrastructure Investment & Jobs Act (IIJA)? What observations did you make regarding IIJA funding in your markets?
- What was your experience related to state-funded infrastructure? What was your experience in nonresidential and residential construction?

For equipment suppliers and others:

- Share your observations of the 2024 construction materials market, and tell us about your equipment sales in the last year. Did your sales to the aggregate industry meet or exceed your expectations?
- How would you characterize the impact IIJA has had on your sales to date?
- What sentiments did you hear in 2024 from producers about their ability (or inability) to purchase equipment, technology and services?

For everyone:

• What impact did inflation have on your business in 2024? How did you manage through another year of it? What impacts were made on salaries and wages? What other areas were affected?

2025 OUTLOOK

For everyone:

- How would you characterize your feelings for the year ahead as it pertains to the aggregate industry?
- How does the election of Donald Trump as president and a Congress fully controlled by Republicans influence your outlook for 2025 and beyond?
- Did your company bring a backlog into the new year? If so, describe the form that backlog has taken.
- What investments are you making to better your business in the year ahead?
- What concerns do you have for the business this year?
- What are your expectations related to interest rates for 2025, and what effects do you anticipate interest rates to have on capex in the year ahead?

For producers:

- What are your sales expectations for 2025 regarding aggregates? Tell us about the dynamics at play in your state or region that should drive or hinder demand in 2025.
- What are your expectations for IIJA funds in your market this year? Are there any projects in planning or underway tied to IIJA?

- Aggregate producers have experienced good pricing momentum over the last several years.
- Do you foresee this trend continuing in 2025. Do you believe aggregate products have inherently been undervalued?

For equipment suppliers:

- What are your sales expectations for 2025 regarding the aggregate industry?
- What adjustments have you made to your manufacturing processes or distribution capabilities to meet customer needs this year and beyond? Have you noticed other manufacturers and dealers taking any interesting measures?

SECURING THE FUTURE

For everyone:

- Highway funding
- President Trump has been vocal about imposing tariffs on goods from foreign nations. How might this impact the aggregate industry? Do you have a sense of the potential impacts related to equipment, parts and raw materials?
- IIJA was signed into law under the Biden administration in 2021 as a \$1.2 trillion measure providing about \$350 billion for federal highway programs. With IIJA expiring in 2026, do you expect another meaningful bill to be pursued by the Trump administration and passed by the new Congress?
- NSSGA
- Many of this year's Roundtable attendees are members of the National Stone, Sand & Gravel Association (NSSGA), which is currently searching for its next president and CEO following the departure of Michael Johnson late last year. To those of you who are members, how would you characterize the value NSSGA provided during Johnson's 11 years at the helm? How would you describe the association's standing in Washington today, as well as the influence it has in the nation's capital?
- What direction would you like to see NSSGA take under its next chief executive?

For producers:

- Establishing New Operations & Expanding Existing Sites
- With the U.S. population continuing to grow and the American Society of Civil Engineers grading the nation's infrastructure with a C-minus, demand for aggregates should remain high in the coming years. Still, securing aggregate reserves is no easy task in some markets. What has your experience been like of late to establish a new operation or expand an existing one?
- Merger and acquisition activity was healthy in 2024, with deals big and small going down. Do you anticipate M&A to remain the top pathway to achieve growth in the coming years? If so, how might additional industry consolidation affect the dynamic within some markets? What impacts can be expected?
- Are your aggregate reserves (or your competitors') getting farther away from the core demand areas? Are you (or your competitors) exploring alternative means of transportation (i.e. barge, rail) to reach these markets?



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Aerial Surveys & Stockpile Analysis

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2025 Roundtable Topics

continues from page 6

EQUIPMENT & TECHNOLOGY

For producers:

• How are you preparing for your company's future? Are you exploring AI or further digitalizing equipment? Going electric for fleets or processing equipment? Is there interest or a potential future in one or more of these areas for your company?

For equipment suppliers:

- Suppliers in the industry have historically focused on manufacturing and distributing equipment, but more companies are seemingly finding ways to incorporate technology components into their businesses – perhaps by making unique hires, establishing partnerships or acquiring companies that specialize in technology. All this said, how are you integrating technology into your traditional business model to stay competitive and drive innovation?
- Over the past few years, suppliers have been promoting technologies such as sensors and controls to help producers better manage their equipment. However, many producers have been hesitant to adopt these technologies, with some citing concerns about the compatibility of tech components with the inherently dusty and dirty environment of aggregate operations. Given these challenges, do you believe suppliers will be able to overcome these obstacles, demonstrate the real-world value of their technologies, and successfully continue with implementation in the aggregates industry?
- What other trends are you seeing in equipment? Are you seeing a drive toward bigger equipment? Smaller equipment?

For everyone:

• On sustainability: Do you anticipate any pause or a pullback in sustainability initiatives to take place with President Trump taking office this month?

SAFETY & HEALTH

For producers:

- Mining fatalities continue to trend near all-time lows, with the Mine Safety & Health Administration (MSHA) reporting 28 miner fatalities in 2024. How would you characterize the industry's record on safety today? What improvements could be made to genuinely make operations safer?
- MSHA's rule titled "Lowering Miners' Exposure to Respirable Crystalline Silica & Improving Respiratory Protection" goes into effect for metal/nonmetal mine operators in April 2026. What's your reaction to the rule's standards? Do you feel you have a good handle on the rule's requirements, and what steps, if any, has your company taken to date to come into compliance with the new rule by spring 2026?
- How would you characterize your experience with MSHA (i.e., inspectors, district managers and others) under assistant Chris Williamson and the Biden administration? What expectations do you have of MSHA under the second Trump administration?
- Are you actively seeking out technology that can make your operation safer? Are there cost barriers to entry with some safety controls that could ultimately make operations safer?
- How does your operation approach "staffing" for safety? Do you have a staff member dedicated to safety? If not, what approaches have been effective to ensure safety at operations?

For equipment suppliers and others:

- How are you supporting producers in their effort to operate more safely?
- What role are you finding technology playing in making operations safer?

TRADE SHOWS & MEETINGS

For everyone:

- What are your expectations for AGG1 2025 (March 25-27) in St. Louis?
- What other trade shows (i.e., Bauma) and meetings do you plan to explore in 2025?
- Are you making plans at this early stage to be involved in some capacity with next year's ConExpo-Con/Agg? For producers, what is your plan of attack for ConExpo-Con/Agg 2026? For suppliers, what can you share at this early stage about your show plan?



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Meet Our Speakers



Friday, January 31

Legislative & Government Affairs Outlook



Evan Bender Director of Government Affairs. NSSGA

Evan is director of government affairs at the National Stone, Sand & Gravel Association (NSSGA), responsible for handling transportation and infrastructure, appropriations and labor issues. Prior to joining NSSGA, he worked on Capitol Hill for seven years as legislative director for congressman Troy Nehls (TX-22) and legislative assistant to congressman John Carter (TX-31). A native of Austin, Texas, Evan has a bachelor's degree in political science from the University of Oklahoma.

Mine Safety & Health Administration Outlook



Margaret Lopez Shareholder, Ogletree Deakins

Margo is a longtime workplace safety lawyer representing mining companies. She is a successful litigator, regularly presenting company and industry cases before administrative law judges, federal review commissions and the United States Courts of Appeals. Margo represents mine operators in federal investigations and cases arising out of mine incidents and agency enforcement actions under the Federal Mine Safety & Health Act. Additionally, Margo is a regular contributor to *Pit & Quarry*, co-authoring the monthly MSHA & The Law column alongside Ogletree Deakins' Bill Doran.

Construction Materials Market Outlook



George Reddin

Managing Director, FMI Capital Advisors

George is a managing director at FMI Capital Advisors, FMI Corporation's registered investment banking subsidiary. He specializes in mergers and acquisitions and financial advisory services. George works regularly with companies in the construction materials industry (aggregates, hot-mix asphalt, ready-mixed concrete and concrete product producers), as well as contractors involved in roadbuilding construction. He is a quarterly contributor to *Pit & Quarry*, co-authoring the Market Insights column with FMI's Rob Mineo and Evan Coughlin.

Panel Discussion: Adapting to New Demands in a Dynamic Industry

The aggregate industry is undergoing a transformative shift, with innovation and tradition converging to redefine production. This panel will explore emerging trends that are reshaping the landscape, from AI and autonomous operations to the strategic approach of "doing more with less." Hear how leading producers are leveraging technology to enhance efficiency, sustainability and productivity, examining the cutting-edge developments that will define the future of aggregate operations.

Ross Duff *VP / President* Duff Quarry **Jonathan Hart** President Washington Rock Quarries **Raymond Slaughter** Director of Engineering & Construction Luck Stone Kristin Sweeney Director of Operations US Aggregates



• • • •

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Roundtable Partners

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Astec Industries

Astec Industries, founded in 1972 and headquartered in Chattanooga, Tennessee, is a leading manufacturer of specialized equipment for the aggregate, asphalt and concrete sectors. The company designs, builds and supports a variety of products including crushing, screening, washing, material handling, ports and terminals and mobile equipment, as well as fully customized systems. Astec's mission is to create state-of-the-art equipment that allows customers to achieve life-changing results. With a commitment to innovation and customer service, Astec has become a global leader from Rock to Road.



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Roundtable Partners



GOLD PARTNERS (continued):

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LJ Inc.

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Philippi Hagenbuch

PHIL specializes in helping aggregates quarries be their best; get the most out of their off-highway haul trucks and to maximize the material hauled, as safely and efficiently as possible, optimizing quarry operations for maximum revenue. We can help you haul 10%+ additional material with the same number of trucks and labor, annually with an ROI of less than three months.

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SMH is committed to understanding end-user needs and creating solutions that improve performance and drive cost savings. The company has over 300 associates dedicated to serving their global customers with innovative engineering solutions and high-performance equipment.

All SMH products meet or exceed regulatory standards such as OSHA, MSHA, CSA, UL, and others. Both manufacturing facilities are certified to ISO Standard 9001:2015. SMH is a charter member of CEMA and an active member of NSSGA, NMA, SME, and PMMI.

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TerraSource Global delivers tailored, turn-key solutions for aggregate & mineral operations. Our trusted brands— Gundlach Crushers, Jeffrey Rader, Pennsylvania Crusher, and Elgin—drive efficiency, reliability, and productivity while minimizing maintenance. We offer crushers, hammer mills, screens, separators, rotary breakers, feeders, and handling systems, customized for diverse materials, throughput, and conditions. Key products include Tabor's high-capacity vibrating screens for dependable performance and Jeffrey Rader's electromagnetic feeders for precise, high-volume material control. From start to finish, our equipment maximizes output and enhances product quality at every stage of production. Stop by our booth at SME Minexchange (Booth #1507) & AGG1 (Booth #2309).

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NSSGA

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Ryan Morales Damian Murphy Nick Oster Nick Pearman Bryan Scepaniak John Scepaniak Raymond Slaughter Luck Stone Kristin Sweeney **Chris Taylor Keaton Turner Jason Waddell Chris Williams Travis Wise**

Gulf Coast Sand Peckham Industries Fischer Mining Rogers Group Inc Wm. D. Scepaniak Wm. D. Scepaniak Us Aggregates North American Mining Turner Mining Group Jones Bros. Contractors Capital Aggregates Wingra Stone Company

SPEAKERS

Evan Bender Margaret Lopez

PARTNERS

Elliot Archibald Riley Arndt Jeremy Bell **Benjamin Black** Dan Carney Leigh Cole **Evan Coughlin** Padraic Dillon Greg Donecker **Erik Elkington Ross Ellis Brvan Fanis** Matthew Freissle **Maryanne Graves** Jeff Gray **Chad Greenfield** Geoff Hawker Thomas Jordan **Alex Kanaris** Michael Kelly Randy Kunz Byron Laferriere Mike Larkin Matt Lepp **Rick Madara** Kent Masden Harold Maurer

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ASSOCIATION

Patrick Jacomet

Ohio Aggregates & Industrial Association

Ace McCarthy Two Eight Drilling **Brent McManis** WEG Electric Corporation Drew Miller John Deere Antoine Moscatelli Haladjian Mineral Kelan Moylan TCI Manufacturing Mike Murphy Aggregate Crusher **Buffalo Wire Works Dominic Nasso** Ryan Newman Astec **Oliver Nobels** Schurco Slurry FMI Capital Advisors George Reddin Vincent Rocco Amcast Eric Rosenow Dyno Nobel Nick Roseto Dodge Industrial **Don Ruppert** TerraSource Nick Schur Schurco Slurry Sheldon Shepherd Tecweigh **Tracy Slieff** LJ Inc. Josh Swank Philippi-Hagenbuch Crush Mode Micah Tysver **Kevin Vonesh** Loadrite **Brian Vrablic** Rulmeca Corporation **Brent Walker** TerraSource L&H Industrial **Gage Wandler** Patrick Weaver L&H Industrial **Randy Webb** Syntron Material Handling Adam Wint Quick Supply

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Video Opportunity (Optional)

Attendees will have the opportunity Friday, Jan. 31 between 6:15 and 7:45 a.m. to speak on camera with a Pit & Quarry editor. We will be asking interested attendees the questions listed below. Roundtable attendees can answer questions of their choosing.

STATE OF THE INDUSTRY

For everyone: How would you characterize the aggregate industry's performance in 2024? What stood out — the good and the bad?

For everyone: How do you expect the aggregate industry to fare in 2025? What factors or developments will dictate the industry's outcome this year?

EQUIPMENT & TECHNOLOGY

For producers: What transformational equipment and technology have you invested in or explored of late? *For suppliers:* How is your company incorporating emerging technology into its equipment offerings?

TRADE SHOWS & MEETINGS

For everyone: What industry events are on your 2025 schedule and why?

ESTABLISHING NEW OPERATIONS

For producers: What has your experience been of late in terms of establishing new operations or expanding existing ones? What strategies have been successful for your company?

SAFETY & HEALTH

For everyone: What are you doing differently in 2025 versus five years ago to elevate your company's safety culture?

ROUNDTABLE EXPERIENCE

For those videoed before the Roundtable: For those of you who've been to a past *Pit & Quarry* Roundtable & Conference, please tell us about your experience and the value provided.

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Meet the P&Q Staff

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