

# Government Affairs Committee Fall Meeting

**Jeremiah Lemons, CRH Americas Materials**  
Chair, Government Affairs Committee

**Michael LeMonds, Holcim**  
Executive Committee Liaison, Government Affairs Committee

**Andrew Tyrrell, NRMCA**  
Executive Vice President, Government Affairs

**Heather Houck, NRMCA**  
Manager of CONCRETEPAC



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# Antitrust Statement

**This meeting is conducted in accordance with the NRMCA Antitrust Policy Statement**

The National Ready Mixed Concrete Association assigns the highest priority to full compliance with both the letter and the spirit of the antitrust laws. Agreements among competitors that unreasonably limit competition are unlawful under federal and state antitrust laws, and violators are subject to criminal fines and incarceration, civil fines and private treble-damage actions. Even the successful defense of antitrust litigation or an investigation can be very costly and disruptive. It is thus vital that all meetings and activities of the Association be conducted in a manner consistent with the Association’s antitrust policy.

Examples of illegal competitor agreements are those that attempt to fix or stabilize prices, to allocate territories or customers, to limit production or sales, or to limit product quality and service competition. Accordingly, it is inherently risky and potentially illegal for competitors to discuss under Association auspices, or elsewhere, the subjects of prices, pricing policies, other terms and conditions of sale, individual company costs (including planned employee compensation), the commercial suitability of individual suppliers or customers, or other factors that might adversely affect competition.

It is important to bear in mind that those in attendance at Association meetings and activities may include competitors, as well as potential competitors. Any discussion of sensitive antitrust subjects with one’s competitors should be avoided at all times before, during, and after any Association meeting or other activity. This is particularly important because a future adversary may assert that such discussions were circumstantial evidence of an illegal agreement, when viewed in light of subsequent marketplace developments, even though there was, in fact, no agreement at all.

If at any time during the course of a meeting or other activity, Association staff believes that a sensitive topic under the antitrust laws is being discussed, or is about to be discussed, they will so advise and halt further discussion for the protection of all participants. Member attendees at any meeting or activity should likewise not hesitate to voice any concerns or questions that they may have in this regard.

Adopted by the NRMCA Membership, on April 3, 2006, and reaffirmed by legal counsel on January 19, 2024



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# Chairman’s Remarks



**Jeremiah Lemons**  
CRH Americas Materials  
Chair, Government Affairs Committee

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# Approval of the Minutes

**Motion:** Approve the minutes of the Spring Meeting of the Government Affairs Committee as distributed.

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# Agenda

Open and Welcome

-

Antitrust Statement

-

Chairman’s Remarks

Agenda Overview

Legislative Outlook


Update on Government Affairs Work

Strategic Planning Discussion


Political and Grassroots Update

Election Forecast

Adjourn




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# LEGISLATIVE OUTLOOK



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## Legislative Outlook


**The 118<sup>th</sup> Congress ...**

- Divided government
- Partisan acrimony
- Politics-forward environment
- Little meaningful legislation





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## Legislative Outlook


**Lame Duck ...**

- Appropriations thru the end of the fiscal year
- National Defense Authorization Act
- Senate: confirm judicial nominees
- Unlikely but possible additional items:
  - Farm Bill 2024
  - Bipartisan tax bill





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# UPDATE ON COMMITTEE WORK



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## Mass Timber and Material Preferences


**BLUF:** For the first time in five years, the National Defense Authorization Act has no proposed policies related to mass timber.

**Over the years, we’ve:**

- Defeated a proposed mass timber building program at DoD
- Established a sustainable building materials program to preempt the mass timber program
- Defeated another proposed mass timber building program at DoD
- Defeated efforts to modify the sustainable building materials program
- Defeated efforts to mandate education on how to build with mass timber DoD
- Educated Congressional offices on importance of material neutrality



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## Mass Timber and Material Preferences

**How did this happen?**

- We started early and got aggressive
  - Requested legislative language to be included in base text – House and Senate
  - Scheduled meetings with more than 70 Congressional offices on House and Senate Armed Services Committee
- Continued to leverage Republic Consulting’s defense practice
- Congressional offices to Committee:
  - Avoid material wars, insist on material neutrality
- Letters, texts and calls from NRMCA members, state associations
- Deployed the Congressional Dashboard to demonstrate industry footprint in Congressional districts
- Forced the conversation and made the issue a headache



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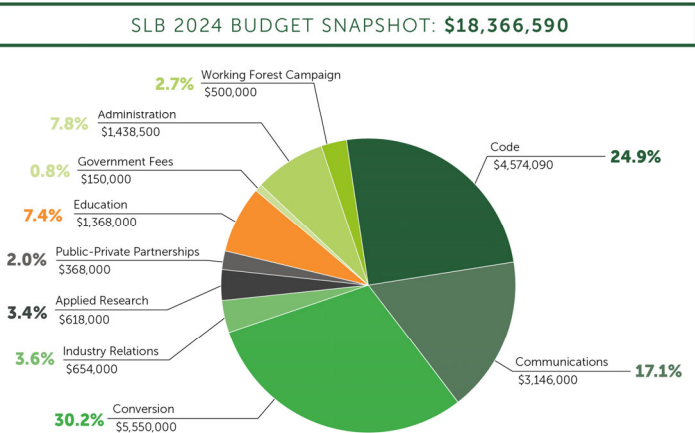
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## Mass Timber and Material Preferences


Advocates for mass timber and innovative wood products are not going away

Wood has a well-funded checkoff program that funds promotion and marketing while the associations can spend their money on lobbying


SLB 2024 BUDGET SNAPSHOT: \$18,366,590



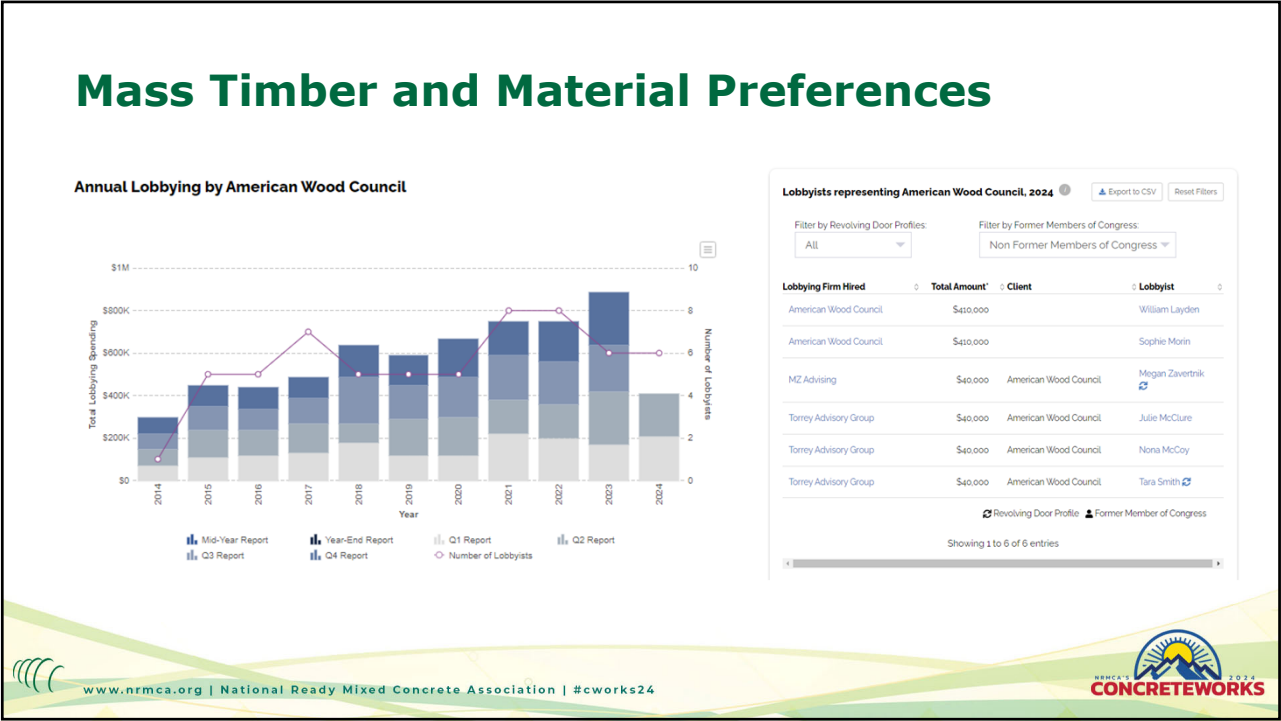
Category	Percentage	Amount
Code	24.9%	\$4,574,090
Conversion	30.2%	\$5,550,000
Communications	17.1%	\$3,146,000
Industry Relations	3.6%	\$654,000
Applied Research	3.4%	\$618,000
Public-Private Partnerships	2.0%	\$368,000
Education	7.4%	\$1,368,000
Government Fees	0.8%	\$150,000
Administration	7.8%	\$1,438,500
Working Forest Campaign	2.7%	\$500,000



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## Mass Timber and Material Preferences

### S. 4149 - Mass Timber Federal Building Act

- Sens. Jeff Merkley (D-OR), Jim Risch (R-ID), Ron Wyden (D-OR), Mike Crapo (R-ID)
- Creates a federal preference for mass timber buildings when GSA is building, leasing or buying a structure
- Positioned by Sen. Risch and Sen Crapo team as a forest management policy


### H.R. 8790 - Fix Our Forests Act

- Includes R&D program to evaluate opportunities for wildfire resistant structures through “different affordable building materials, including mass timber.”
- Opportunities for concrete – material neutral program


## Mass Timber and Material Preferences

**S. 2991 - America’s Revegetation and Carbon Sequestration Act of 2023**

- Introduced by Sen. Joe Machin (I-WV)
- Provides for practical research for architects, developers and forest products industry
- Develop and facilitate the adoption of curriculum for building structures with mass timber
- Technical assistance to states in designing wood bridges
- Database accounting for carbon stored in federal buildings
  - *Opportunity for concrete and full lifecycle thinking*
- Construction of not fewer than 100 single occupancy restrooms using mass timber
- Publish an estimate of carbon stored in building materials and forest products
  - *Opportunity for full lifecycle thinking*



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## Mass Timber and Material Preferences

**Fighting back ...**


- Met with OR and ID offices to share concerns and opposition
- Coordinated opposition from NRMCA members and steel associations
- Worked with Energy and Natural Resources Committee staff to secure modifications to S. 2991

**And going on the offensive**

- Comprehensive review of existing provisions in law that may allow for a preference for mass timber or innovative wood products
- Identify relevant authorizing bills and assess approaches to modify
- Provisions to codify policy of material neutrality
- Force discussion of full lifecycle thinking



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## Mass Timber and Material Preferences

ned for such land.


*Material neutrality.*—The Committee supports the FHWA’s work to promote research, development, and deployment of building solutions that advance the performance, sustainability, reliability, and resiliency of building materials. The Committee encourages the Department to support material neutral decisions that do not promote or provide preference for specific building materials. The Committee believes that Federal resources are best utilized when all materials are considered on their own merits, allowing for the best solutions to address our infrastructure challenges.

*National motor vehicle per-mile user fee pilot program.* The

*Directives from the 2025 Departments of Transportation, Housing and Urban Development Appropriations Committee Report*



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## Concrete and Asphalt Innovation Act

**Research Programs**

- Grants to federal and some private entities for six focus areas

**State DOT Grant Program**


- Voluntary grant programs for states to adopt performance specifications

**Advance Market Commitments**


- Three year advance purchase commitments to incentivize investment in and development of low emissions concrete and asphalt products

**CAIA in the 118<sup>th</sup> and 119<sup>th</sup> Congress**

- Garnered additional cosponsors
- Will not be considered in the 118<sup>th</sup> Congress
- Significant revisions in 119<sup>th</sup> Congress



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## IMPACT Act and IMPACT 2.0 Act

### IMPACT Act


- Modified R&D provisions of CAIA
- Passed out of Committee and passed the House on suspension
- NRMCA, PCA and other organizations provided letters of support

### IMPACT 2.0

- Transportation provisions of CAIA
  - Voluntary grant programs
  - Advance market commitments
- Introduced and referred to Transportation and Infrastructure Committee
- Will not be considered in 118<sup>th</sup> Congress



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## Additional Work in the 118<sup>th</sup> Congress

### Buy America in WRDA/FAA

- Joint outreach to Committees on implementation consistent with IIJA

### Building codes hearing at T&I


- Lead comments on behalf of NRMCA, PCA, NSSGA and NAMIC

### Disaster Savings and Resilient Construction Act


- Outreach to potential new sponsors; primary sponsor Rep Pascrell passed away

### Opposition to GHG Rule

- Partnered with coalition to promote repeal of GHG emissions measures for states



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## Big Ticket Items for the 119<sup>th</sup> Congress

**Highway Bill/Surface Reauthorization**

- Existing authorization expires September 2026

**Tax Extensions/Reforms**

- Dependent on outcome of elections
- Host of important tax provisions of the TCJA expiring
- Bipartisan interest in getting this done

**Farm Bill Reauthorization**

- Expired September 2023, extended



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## Ready Mix Specific Items for 119<sup>th</sup> Congress

**Fly Ash Reclamation Study**


- EPA Smart Sectors released preliminary results of study on fly-ash

**Performance Specifications**


- Provision from Concrete and Asphalt Innovation Act providing grants to states to adopt performance specifications

**Truck Weights**

- Building on policy of the FRESH Act to allow



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# POLITICAL AND GRASSROOTS UPDATE



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# CONCRETEPAC Update

**PAC fundraising on track for record setting cycle:**


- Receipts/pledges for cycle: \$523,900
- Disbursed for cycle: \$465,000

**Disbursement strategy:**

- Senate candidates and incumbents for pro-business majority
- Ensuring friends of the industry are supported and returning
- Identifying and supporting pro-business, pro-ready mix candidates



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CONCRETEPAC Update



David Taylor (OH-2)  
Sardinia Ready Mix  
Republican nominee for Congress



Gabe Evans (CO-8)  
CO State Assembly  
Republican nominee for Congress

For informational purposes only

got concrete?



Mik Market

CONCRETEPAC

October 12, 2024  
7:30 pm - 11:00 pm  
Historic Dairy Block - Denver  
Transportation Provided

16-concept food hall  
cocktail making class  
spring roll making class  
live entertainment  
games  
door prize drawings

## Legislative and Policy Forum



**HILL DAY 2024**  
**NAPA+NRMCA+NSSGA**

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## District Profiles


Industry footprint by Congressional district based on regional data

For use during Hill visits, meeting with Members and staff

Available to NRMCA members, state associations

Request at [advocacy@nrmca.org](mailto:advocacy@nrmca.org)

GIGO: make sure your facility list is updated with NRMCA!



**Rep. Glenn "G.T." Thompson (R-PA-15)**

**About NRMCA**

NRMCA is a full-service trade association representing the ready mixed concrete industry.

**National Promotion:** NRMCA's work with national builders and developers is creating concrete opportunities across the U.S.

**National Benchmarking:** NRMCA's renowned surveys help companies strengthen performance.

**Safety First:** NRMCA's professional safety program helps ready mixed concrete producers navigate OSHA regulations and run safer operations.

**Other Industry Facts**


**Geographic Footprint:** Operations are based in or run in every Congressional District in the country.

**Sustainability:** NRMCA's member companies lead from the front on reducing their carbon emissions, providing tools and resources for members to measure and reduce the embodied carbon of their products.

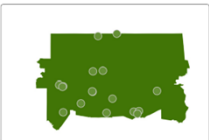
**Codes & Standards:** Ensuring resilience and strong building codes is an integral part of NRMCA's mission.

**Economic Impact:** The value of the ready mixed concrete industry is estimated at \$55 billion in sales alone, with hundreds of billions in economic impact.

Visit NRMCA's website at [www.nrmca.org](http://www.nrmca.org) for additional information or scan this QR code



**NRMCA Plant Locations in District**



**Impact of Infrastructure Investment**

Every \$1 billion in federal investment:


- Leads to 18,500 construction jobs
- Directly or indirectly supports up to 35,000 jobs
- Leads to 3,000,000 cubic yards placed


**Ready Mix Concrete in the District**


Number of Facilities: 18  
Number of Employees: 277  
Yards produced in district: 803K  
Sales in District: \$134M

Number of Facilities in State: 138  
Employees in State: 2,13K  
Yards in State: 9.44M  
Sales in State: \$1.57B

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# STRATEGIC PLANNING

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## Strategic Planning Discussion



**Deb Malone**  
NRMCA  
Chief Operating Officer



**Michael LeMonds**  
Holcim  
Executive Committee Liaison,  
Government Affairs Committee



**Jeremiah Lemons**  
CRH Americas Materials  
Chair, Government Affairs  
Committee

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## Strategic Planning Discussion

**Timeline for NRMCA Strategic Planning 2024-2025**

- Validation of Mission, Vision and Values – August/September
- **Gathering Stakeholder Insights – October/January**
- Identify key data elements – October/January
- Engage strategic plan development team – November/May
- Validate our direction – February/May
- Plan finalized and Board Review - 2025

**Goals for Today’s Discussion**

- Your input on future opportunities, challenges, priorities
- Discussion of WHAT we’ll address rather than HOW we’ll address





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## Strategic Planning Discussion


**Additional opportunities to engage**

- Today, October 11 @ 2PM in Homestead 1
- Tomorrow, October 12 @ noon in Homestead 1


**Complete the Mission, Vision and Values survey**

- Help us validate NRMCA’s mission, vision and values
- Link via QR code





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# ELECTION FORECAST

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## House of Representatives

**Republicans defending slim majority**

- 220 Republicans
- 212 Democrats
- 3 vacancies (2 D, 1 R)

Approx 20-30 tossup districts

- Sabato: 18
- Cook: 26
- RCP: 31

DEMOCRATS  
191  
Safe or Likely

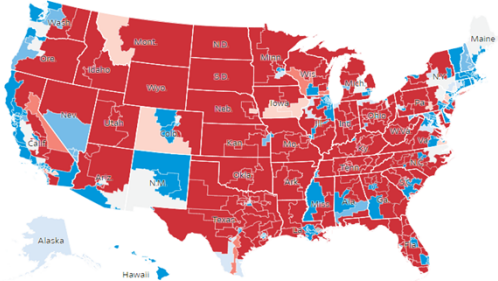
Most competitive  
43


REPUBLICANS  
201  
Safe or Likely


Lean 13 Tossup 19 Lean 11

Majority

By geography By seat



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House of Representatives

Republicans		
TOSS-UP (8)	LEANS REPUBLICAN (10)	LIKELY REPUBLICAN (10)
Juan Ciscomani (AZ-6)	Ken Calvert (CA-41)	Kevin Kiley (CA-3)
David Schweikert (AZ-1)	M. Miller-Meeks (IA-1)	Young Kim (CA-40)
John Duarte (CA-13)	Zach Nunn (IA-3)	CO-3 Open (Boebert)
Mike Garcia (CA-27)	John James (MI-10)	Anna Paulina Luna (FL-13)
Michelle Steel (CA-45)	Ryan Zinke (MT-1)	Maria Elvira Salazar (FL-27)
David Valadao (CA-22)	Tom Kean Jr. (NJ-7)	Nick LaLota (NY-1)
Marc Molinaro (NY-19)	Mike Lawler (NY-17)	Brian Fitzpatrick (PA-1)
L. Chavez-DeRemer (OR-5)	Scott Perry (PA-10)	Andy Ogles (TN-5)
	Jen Kiggans (VA-2)	Monica De La Cruz (TX-15)
	Derrick Van Orden (WI-3)	Bryan Steil (WI-1)

SAFE REPUBLICAN FLIPS (3)
NC-14 Open (Jackson)
NC-6 Open (Manning)
NC-13 Open (Nickel)

Total seats rated Safe Republican: 191  
Total seats rated Safe, Likely, or Leans R: 211

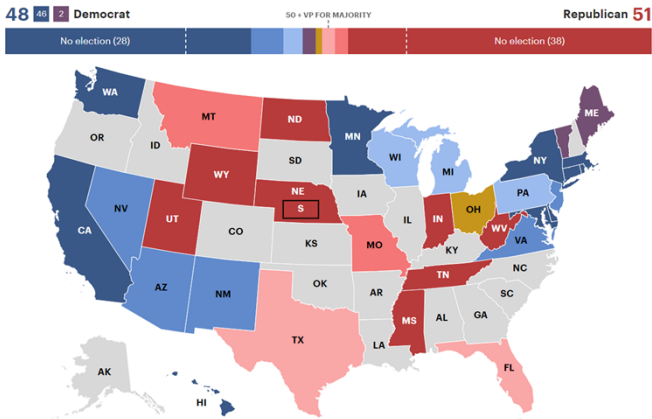


Democrats		
TOSS-UP (10)	LEANS DEMOCRATIC (15)	LIKELY DEMOCRATIC (16)
Mary Peltola (AK-AL)	CA-47 Open (Porter)	AL-2 Open (Moore)
Yadira Caraveo (CO-8)	Jahana Hayes (CT-5)	Josh Harder (CA-9)
Jared Golden (MI-2)	Frank Mrvan (IN-1)	Mike Levin (CA-49)
MI-7 Open (Slotkin)	Eric Sorensen (IL-17)	Sharice Davids (KS-3)
MI-8 Open (Kildee)	Angie Craig (MN-2)	MD-6 Open (Trone)
Don Davis (NC-1)	Don Bacon (NE-2)	Hillary Scholten (MI-3)
Emilia Sykes (OH-13)	Gabe Vasquez (NM-2)	NH-2 Open (Kuster)
Matt Cartwright (PA-8)	Anthony D'Esposito (NY-4)	Chris Pappas (NH-1)
Susan Wild (PA-7)	Pat Ryan (NY-18)	Susie Lee (NV-3)
M. Gluesenkamp Perez (WA-3)	Brandon Williams (NY-22)	Steven Horsford (NV-4)
	Marcy Kaptur (OH-9)	Dina Titus (NV-1)
	Chris Deluzio (PA-17)	Tom Suozzi (NY-3)
	Henry Cuellar (TX-28)	Greg Landsman (OH-1)
	Vicente Gonzalez (TX-34)	Val Hoyle (OR-4)
	VA-7 Open (Spanberger)	Andrea Salinas (OR-6)
		Kim Schrier (WA-8)

SAFE DEMOCRATIC FLIP (1)
Garret Graves (LA-6)

Total seats rated Safe Democratic: 175  
Total seats rated Safe, Likely, or Leans D: 206

Senate




### Dems Running in Trump competitive states

State	Incumbent	2020 presidential vote	2018 Senate margin
Arizona	Kyrsten Sinema (I)	Biden 0.3%	2.3%
California	Dianne Feinstein	Biden 29.2%	8.3%*
Connecticut	Chris Murphy	Biden 20.0%	20.2%
Delaware	Tom Carper	Biden 19.0%	22.1%
Hawaii	Mazie Hirono	Biden 29.5%	42.3%
Maine	Angus King (I)	Biden 9.1%	19.1%
Maryland	Ben Cardin	Biden 33.2%	34.6%
Massachusetts	Elizabeth Warren	Biden 33.5%	24.2%
Michigan	Debbie Stabenow	Biden 2.8%	6.5%
Minnesota	Amy Klobuchar	Biden 7.1%	24.1%
Montana	Jon Tester	Trump 16.4%	3.6%
Nevada	Jacky Rosen	Biden 2.4%	5.0%
New Jersey	Bob Menendez	Biden 15.9%	11.2%
New Mexico	Martin Heinrich	Biden 10.8%	23.6%
New York	Kirsten Gillibrand	Biden 23.1%	34.0%
Ohio	Sherrod Brown	Trump 8.0%	6.9%
Pennsylvania	Bob Casey	Biden 1.2%	13.1%
Rhode Island	Sheldon Whitehouse	Biden 20.8%	23.1%
Vermont	Bernie Sanders (I)	Biden 35.4%	39.9%
Virginia	Tim Kaine	Biden 10.1%	16.0%
Washington	Maria Cantwell	Biden 19.2%	16.9%
West Virginia	Joe Manchin	Trump 38.9%	3.3%
Wisconsin	Tammy Baldwin	Biden 0.6%	10.8%

State	Incumbent	2020 presidential margin	2018 Senate margin
Florida	Rick Scott	Trump 3.4%	0.1%
Indiana	Mike Braun	Trump 16.1%	5.9%
Mississippi	Cindy Hyde-Smith	Trump 16.5%	19.0%
Missouri	Josh Hawley	Trump 15.4%	5.8%
Nebraska	Deb Fischer	Trump 19.2%	19.1%
Nebraska special	Pete Ricketts*	Trump 19.2%	n/a
North Dakota	Kevin Cramer	Trump 33.4%	10.8%
Tennessee	Marsha Blackburn	Trump 23.2%	10.8%
Texas	Ted Cruz	Trump 5.6%	2.6%
Utah	Mitt Romney	Trump 20.5%	31.7%
Wyoming	John Barrasso	Trump 43.4%	36.9%



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### Potential Senate Surprises



Deb Fischer (NE)



Ted Cruz (TX)



Rick Scott (FL)



Larry Hogan (MD)



Tammy Baldwin (WI)



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2024 Presidential Election Odds, Predictions: Trump Surpasses Harris Despite Latest Polls

Newsweek

News

2024 Election

Donald Trump

Kamala Harris

Betting Odds

Andrew Lynch

Updated: Oct 08, 2024, 07:31 PM EDT

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Betting Average Has Trump Ahead of Harris for First Time Since September

Published Oct 07, 2024 at 11:24 AM EDT

Updated Oct 07, 2024 at 12:12 PM EDT

What are Trump's odds of winning the election? Here's why they just got better

Jim Sargent

USA TODAY

Published 1:52 p.m. ET Oct. 8, 2024 | Updated 1:59 p.m. ET Oct. 8, 2024

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CONCRETEWORKS

2024

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President

6 electoral votes

10 electoral votes

15 electoral votes

19 electoral votes

11 electoral votes

16 electoral votes

16 electoral votes

AK 91%

VT 96%

ME 89%

MA 98%

RI 98%

CT 98%

DE 98%

MD 98%

VA 86%

NC 98%

SC 98%

DC 99%

FL 86%

TX 89%

HI 98%

AZ 67%

NM 92%

KS 98%

AR 98%

TN 98%

AL 98%

GA 64%

OK 99%

LA 98%

MS 98%

IL 98%

IN 98%

OH 92%

PA 55%

NJ 97%

NY 97%

SD 98%

IA 97%

MO 98%

WV 98%

WY 98%

MT 98%

ND 98%

NE 92%

WI 98%

MI 98%

OH 92%

PA 55%

NJ 97%

NY 97%

SD 98%

IA 97%

MO 98%

WV 98%

WY 98%

MT 98%

ND 98%

NE 92%

WI 98%

MI 98%

NOTE: Polymarket bets suggest an 88% chance of Harris winning one of Nebraska's electoral votes and Trump winning the other four. Bets suggest Trump has an 82% of winning one of Maine's electoral votes and Harris winning the other three.

SOURCE: Polymarket as of Wednesday, October 9 at 7 a.m. EDT

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CONCRETEWORKS

2024

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# President

## Betting Odds - 2024 U.S. President

2020 U.S. President Betting Odds

RCP Betting Average: U.S. President | GOP Nomination | Dem Nomination

BETTING ODDS	TRUMP	HARRIS
RCP Average	53.9	44.7
Betfair	52	43
Betsson	56	46
Bovada	54	47
Bwin	55	46
Points Bet	55	44
Polymarket	53	42
Smarmets	52	45



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# Wild Cards

## Hurricane response and aftermath


- Traditionally helps the incumbent, appears to be helping Trump

## October surprise or blunders by either candidate


- Trump is a known quantity; more likely with Harris

## Under-modeled voter registration

- Millions of Republican voters registered in FL, PA, NC, AZ and GA



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## Andrew’s Hot Takes


Georgia and North Carolina are not truly in play


Harris hit her ceiling shortly after DNC

Harris needs to win popular vote by min 2 points

Trump will carry Bernie Moreno over the finish line in OH Sen

Watch VA-7 and MD-6 on election night

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## Pre-Election Update

Join NRMCA’s Government Affairs team for a pre-election update on October 30, 2024


Make plans to attend Jonathan Martin’s keynote on Sunday morning!



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Questions

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