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CONTINENTAL CEMENT
“BACK to the FUTURE...”

No, I am not referring to the Michael J. Fox movie or the character Doc’s memorable time traveling DeLorean. “Back to the Future” is a fitting phrase describing our renewed emphasis on promoting concrete pavement and cement-based paving solutions, and our outlook for a stronger market moving forward.

With the leadership of 2019 Chairman Jim Mack, CEMEX, we championed a plan to improve pavement promotion tools and put more boots on the ground with financial support from the Portland Cement Association (PCA). We are thankful and appreciative that our partners entrusted us on this expanded promotion effort. With a new cooperative agreement in place, we started implementing the first phase of our plan. New promoters are telling the concrete pavement and cement-based solutions story in Arkansas, California, Illinois, Indiana, Missouri and New York, and they have support of our new Vice President of Marketing.

Our focused efforts will continue as we implement changes in our manner and style of communicating our product benefits to the changing demographics of decision-makers. Each of our twenty-one affiliated chapters and state associations will benefit. More than ever, we will deliver messages about the benefits of concrete pavements and address design, construction, specification and competition issues with state DOTs, Federal Highway Administration (FHWA), Federal Aviation Administration (FAA) and the military tri-services.

As we look forward to future opportunities, our stance is bolstered by more contractors standing with us shoulder to shoulder. Among the 2019 accomplishments that I am most proud of is ACPA reaching a new record in the number of contractor members – 214! This makes us a stronger contractor-led and industry-based organization! We have broken through a contractor membership ceiling that has existed since the economy tumbled with the Great Recession in my second year as President of the Association. It is an awesome feeling of perseverance and accomplishment for our staff, and one that will help us deliver even more value for your membership investment.

I encourage you to read the pages of this report with pride knowing that your involvement in ACPA is returning value to your business and the entire industry. If you are not yet a member, why not join with the many members of ACPA in supporting our efforts to create demand for your products/services, provide technical support for your projects/issues and make a positive difference by telling the story of the benefits of concrete pavement?

Thanks go to all members for their on-going support and here’s looking to go Back to the Future!

Gerald F. Voigt, P.E.
President & CEO
2019 BY THE NUMBERS

**Membership:**
- Contractor-Led / Industry Based membership
- 392 total members
- 214 contractors

**Contractors:**
- Repair Only: 5%
- Only Use Ready Mix: 58%
- Operate Own Plant: 37%

**Cement Manufacturers:**
- Percent of US Clinker Production Capacity by Non-Members: 15%
- Percent of US Clinker Production Capacity by Members: 85%

**New Members:**

<table>
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<th>Year</th>
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<th>All Other Categories</th>
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<td>2015</td>
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*22 New Contractors!***

**214 Contractors Total!**
*(Highest All Time)*

**Year-End Revenue Projection ($3.41M Projection*):**

- Contractor (Assem. + Affl.): 38%
- Cement Dues: 8%
- Non-Dues Revenue: 29%
- Other Dues: 27%

*At time of printing*
STRATEGIC PLAN

VISION | OUR FUTURE
ACPA embraces the future leading the promotion of concrete and cement-based paving solutions

MISSION | OUR BUSINESS
ACPA develops and protects markets for concrete pavement through education, advocacy and technical leadership

OBJECTIVES
ACPA represents its members on matters affecting the industry’s relations with the public and public agencies and assists its affiliates with creating a larger market for the services of our members.

FEDERAL ADVOCACY
Voice industry positions and represent the industry on key legislative issues that affect highways and airports

NETWORKING VALUE
Conduct energetic, contractor-focused networking events and recognition programs that build industry prestige

MARKETS
Markets: Airports, Highways, Streets/Roads, Commercial/Industrial

FAIR COMPEITION
Work directly with federal agencies and nationl organizations to promote fair industry competition and objective pavement selection policies

CUSTOMER TRAINING
Deliver high-quality, strategically-focused education and training programs on timely concrete and cement-based paving topics

STRATEGIC PROMOTION
Influence norms, specifications and projects at the state and local level, impacting business opportunities and market value for all members downstream

DELIVERY SUPPORT
Deliver timely support and information to chapters and members, leveraging staff expertise and relationships to influence project outcomes
ACPA is the only trade association representing the concrete paving industry on matters affecting the public and public agencies. As a contractor-led industry organization, we have unique relationships with agencies and consultants, which positions us to help members and agencies work through critical issues. ACPA’s national and local chapter/state association staff are among the most knowledgeable experts in the world about concrete pavement technology, policy, and promotion...

Promotion and Liaison with Government
ACPA represented members at high-level meetings and on different committees and expert groups, advancing members’ views in ways they cannot provide individually or through the support of hired consultants. In 2019, ACPA National was called upon for advice in pavement matters by all of the agencies we engage with on behalf of the industry.

Your Association’s efforts to build credibility as a resource to Congress and the Administration also was emphasized and leveraged in 2019. With our strong presence we achieved another major legislative success for ACPA members.

Advancing “Airfield Pavement Technology Program” Provision
With support from PCA and NAPA, we were successful in getting a pavement technology research provision into the “FAA Reauthorization Act of 2018,” which was signed into law in October 2018. Our goal for the provision is parallel to our goal for the Accelerated Implementation and Deployment of Pavement Technology provision we successfully delivered in MAP-21 and the FAST Act (highway legislation), authorizing research and technology deployment for concrete and asphalt pavements. Our successful new Airfield Pavement Technology Program (Section 744) establishes a program for research and development of airfield pavement technologies for safer, more cost effective and durable airfield pavements.

In 2019, ACPA focused on ensuring the provision was funded through an appropriations bill. With support from our legislative partners, we were again successful in lobbying for the program to be funded in the just passed 2020 Appropriations Bill (“Further Consolidated Appropriations Act”). This bill designates $6 million per year for pavement research ($3 million for concrete and $3 million for asphalt) and brings our legislative goal to a successful outcome. FAA now has an additional $6M for the Airport Pavement Technology Program, and our next steps will involve working with FAA for a clear understanding of ACPA priorities (a parallel effort that began this year, and one that includes our partners at CP Tech Center).
Periodically throughout 2019, ACPA board leaders and staff met with numerous legislators from the Senate and House, and key Administration and agency officials to discuss stewardship issues, such as the Airfield Pavement Technology Program, life-cycle costing, as well as mechanisms for funding infrastructure. The Cement and Concrete Fly-in as well as the Transportation Construction Coalition Fly-in were key avenues for advocating our agenda in 2019.

Drivers Hours of Service Exemption Granted for Concrete Paving Contractors

The Federal Motor Carrier Safety Administration (FMCSA) granted ACPA’s petition for two exemptions to the agency’s hours of service (HOS) regulations on February 5, 2019. The two exemptions are related to the 30-minute break requirement and the 12 hour daily on-duty limit on the short-haul exception.

The exemptions enable drivers transporting central mixed concrete and related materials and equipment in vehicles other than those outfitted with rotating mixer drums, to use 30 minutes or more of on-duty “waiting time” to satisfy the requirement for the 30-minute rest break, provided they do not perform any other work during the break. The exemption also allows drivers to use the short-haul exception but return to their work reporting location within 14 hours instead of the prescribed 12 hours.

ACPA contractors estimate a per company savings of tens of thousands of dollars per construction season depending upon work volume and type. These savings alone offset all or a significant portion of any member contractor’s annual dues and assessments.

Addressing Agency Executives

ACPA met with each of the federal agencies and the military in 2019. Discussions with FHWA executives encouraged them to examine their stewardship responsibilities, and to establish competition between material industries on projects or programs involving federal-aid funds. We also engaged FHWA and expressed appreciation for their effective industry collaboration on their programs funded by the ACPA-crafted Accelerated Implementation and Deployment of Pavement Technologies provision.

With FAA, we continued our active engagement with the agency and thanked them for their willingness to consider our suggestion for P-501 specification revisions. We estimate about eighty percent (80%) of our recommendations were accepted by the agency in the most recent revision, which is applied to projects bid this year.

Discussions with the U.S. Army Corps of Engineers (UASCE) in Omaha centered on construction quality concerns. USACE officials provided examples of workmanship issues they would like addressed through education and training efforts for paving contractor field personnel and construction management firms.
Leveraging Our Voice with Strategic Alliances
ACPA maintained a strong push for the concrete pavement industry’s unique perspectives. In Washington, strategic coalitions are central to our efforts, as are our strong ties with PCA. Although we did not see decisive forward movement on a highway funding fix in 2019, we did on airport legislation, and we continued to deliver strong messaging on the dire need for action and our support for a wide array of solutions, particularly raising user fees for highway funding. In addition to participating in fly-ins and meetings on The Hill with Congressional members and staff, numerous official communiques were made with our partners on your behalf. Our voice and opinions regarding infrastructure funding are leveraged through leading industry coalitions.

In 2019, ACPA signed on to support of a new coalition effort to urge U.S. House and Senate Leaders to develop and pass a long-term, robustly funded surface transportation reauthorization bill. With the strength of more than 150 trade and labor organizations, the Infrastructure Working Group (IWG) is urging Congress to develop and pass a bipartisan infrastructure bill ahead of the September 30, 2020, deadline.

Provisioning Stakeholder Input
In 2019, ACPA took advantage of important opportunities to provide input to FHWA through peer exchanges and stakeholder workshops.

We discussed our strategic priorities for research and development at a meeting at Turner-Fairbank Highway Research Center. ACPA has prioritized performance engineered mixtures and elements of our Vision 2040.

At a pavement design policy national workshop, we discussed the findings from five regional peer exchanges and discussed potential next steps with all industry, state and FHWA representatives present. FHWA will use perspectives to inform priorities for future program efforts.

Top Five Industry Issues (General)
1. Stewardship of competition between industries to improve buying power.
2. Broader use and acceptance of concrete overlays.
3. Inclusion of the scientific, engineered-based items in pavement sustainability – high albedo, stiff system, resilient to inundation/flooding damage, etc.
4. Long-term system or network health (need for increased investment in interstate reconstruction).
5. Leadership on specifications and optimization for recycling/repurposing existing base courses (a growing as need for complete reconstruction of the primary system increases).
Top Five Industry Issues (Materials/Construction)
1. Implementation of performance engineered mixtures* and moving the quality assurance/quality control focus to those variables that affect durability and are controllable in the material selection process.
2. Broader education and acceptance of portland limestone cements for paving applications.
3. Education on use of locally sourced materials (from pozzolans to low-risk durable aggregates).
4. Improved curing and jointing methods.
5. Optimize steel embedment lengths for tie bars and dowel bars coupled with quality control technology to verify steel placement.

FHWA agreed on the importance of education and training on all aspects of design, construction, and materials, including help with SCM’s (fly ash and slag) to address ASR and joint durability.

*ACPA contributes $50,000 per year to the National Concrete Pavement Technology Center for performance engineered mixture technology development and implementation.

FHWA Concrete Pavement Strategic Planning Held at ACPA HQ
With encouragement to “be bold”, FHWA Pavement Design and Performance Team Leader LaToya Johnson set a positive and productive tone for a 1-1/2 day “Concrete Pavement Strategic Planning Meeting” held in August at ACPA headquarters in Rosemont, IL. The discussions were about equally divided between current concerns and limitations of concrete pavement design methods and new ways to evaluate long-life pavement strategies in the face of current budget constraints and limitations. The important deliverable of this effort will be a white paper that captures the key points for future planning.

Meeting participants, including officials from the FHWA, state DOT’s, academia, and industry, share thoughts on the future of concrete pavement design and long-life considerations at ACPA’s office in Rosemont.
WITH the goal of visiting each chapter territory each year, 2019 was a very successful year for achieving this goal and helping our local affiliates and members meet their goals. Our small staff assisted with pavement issues in 46 states and three Canadian provinces, travelling to 41 of them specifically to serve members and their agency partners. This map shows the states visited (dark blue) and where assistance was provided (lighter blue) in 2019. The range and purpose of our efforts include industry leadership, concrete pavement promotion, training programs, agency meetings, technical service and membership development.

**Supporting Members and Chapters**

ACPA links members and a federation of chapter/state promotion organizations, all with the objective to make concrete the paving material of choice. ACPA brings a national perspective to support local promotion. ACPA staff engineers also lend expertise to solve member problems...

**Road Warriors 2019**

With the goal of visiting each chapter territory each year, 2019 was a very successful year for achieving this goal and helping our local affiliates and members meet their goals. Our small staff assisted with pavement issues in 46 states and three Canadian provinces, travelling to 41 of them specifically to serve members and their agency partners. This map shows the states visited (dark blue) and where assistance was provided (lighter blue) in 2019. The range and purpose of our efforts include industry leadership, concrete pavement promotion, training programs, agency meetings, technical service and membership development.

**Support for:**

- **Meetings**
- **Training**
- **Recruiting**
- **Troubleshooting**

**215** Trips Out & Field Visits

**41** States/Provinces Visited

**46** States/Provinces w/Significant Efforts
An important role for the Association has always been assessing projects for industry standard construction methods and outcomes. For more complex issues, this may involve mediation and writing opinion letters to contractors or other members. In 2019, we helped solve problems that spared owners and contractors more than $10 million in unwarranted removals and lawsuits.

ACPA’s four professional engineers responded to hundreds of inquiries and special requests on pavement design and construction matters from within the United States and across the globe. This service involves specification interpretation and field analysis of construction, as well as preparing and checking design calculations and jointing layouts.

Direct support was provided to states and roadway agencies (and their consultants) from both inside and outside the chapter network.

Direct support for airport sponsors, agencies, contractors, consultants, and ACPA chapter Executives were performed for:

**Military** – Pittsburg Air National Guard (ANF), PA; Niagara Falls ANG, NY; Vermont ANG, VT; Buckley Air Force Base (AFB), CO; Tinker AFB, OK; Dyess AFB, TX; Pope AFB, NC; Offutt AFB, OK; Little Rock AFB, AR; Tonopah AFB, NV; and MacDill AFB, FL.

**U.S. Commercial International/Regional** – Mobile, AL; San Juan, PR; Myrtle Beach, SC; Fort Lauderdale, FL; Orlando, FL; Charlotte, NC; Asheville, NC; Raleigh, NC; Buffalo, NY; Houston, TX; New Orleans, LA; Tampa, FL; Northern KY/Cincinnati, KY; John F Kennedy, NY; Atlanta, GA; LaGuardia, NY; Huntsville, AL; Detroit, MI; Jacksonville, FL; Des Moines, IA; Memphis, TN; Athens, GA; Kansas City, MO; Greensboro, NC; Huntington, WV; Indianapolis, IN; Dallas Love Field, TX; Dallas Fort Worth, TX; Nashville, TN; Denver, CO; West Palm Beach, FL.

**General Aviation** – Dodge City, KS; North Myrtle Beach, SC; Fort Wayne, IN; Salisbury, MD; Hamilton, AL; Coastal Carolina, SC; Gary, IN; Darlington, NC; Watertown, SC; Lafayette, LA; Williston, ND; Johnson County, KS; Elkhart, IN; Warrensburg, KS; Millington, TN; Frederick, MD; Ellsworth, KS.

**Canada** – Toronto, ON; Calgary, AB; Vancouver, BC; Victoria, BC.

**International** – Ukraine; Sweden, Sweden; Changi Airport, Singapore; Western Sydney, Australia.
“Concrete Competes” Supports Members/Chapters

ACPA continued its ConcreteCOMPETES program in 2019. National staff provides focused assistance to chapter/states and members to emphasize competition, longevity, quality, and engineering solutions to state and local agencies. Working diligently with our chapters and state affiliates to ensure state agencies adopt the best stewardship practices is central to our ConcreteCOMPETES program. Many states were touched by national help in 2019. Four states highlight the emphasis:

**Pennsylvania** – In September, Chuck Niederriter, Golden Triangle Construction (and past-Chairman of both the ACPA Board and the Pennsylvania Chapter Board) presented formal remarks before the Pennsylvania House Transportation Committee. The focus of the testimony was the usage of concrete and asphalt pavement by PennDOT and the PA Turnpike. The emphasis was on the importance of competition, noting that inter-industry competition saves money for taxpayers and highway users in the Commonwealth. The full hearing can be viewed at the following link (Markers 40 to 85): http://www.pahousegop.com/Video/Transportation.

**Ohio** – ACPA and the Ohio Chapter-ACPA held a meeting in November with Ohio DOT Director, Dr. Jack Marchbanks, and his key leadership staff. The discussion focused on the advantages to Ohio DOT and taxpayers from competition between paving industries in Ohio. Remarks by industry also underscored how both quality and innovation improve with increased competition between paving industries. ACPA offered training and resources on behalf of the association, and our technology partners, CP Tech Center and MIT Concrete Sustainability Hub.

**Missouri** – In the “Show Me State,” ACPA and the MO/KS Chapter brought in MIT’s Jeremy Gregory, to testify on behalf of the industry on its findings regarding the impact of competition on the unit bid prices for both concrete and asphalt pavements. MIT’s findings clearly show statistical significance of the impact when comparing states with two healthy competing industries versus a more one-sided asphalt system. The “data turned into knowledge” approach is intriguing certain legislators on the possibility of a “Fair Competition Clause” for Missouri.

**West Virginia** – An August stakeholder meeting with the West Virginia DOT emphasized the agency’s continued interest in competition in the highway paving market. The meeting with newly appointed Transportation Secretary Byrd White and other key DOT officials focused on ways to extend the purchasing power of the paving dollar in the state. ACPA supported the Mid-Atlantic Chapter on this effort.

**Welcome Back Southwest Concrete Pavement Association (SWCPA)!**

ACPA officially welcomed the SWCPA to the federation of affiliated paving associations in 2019. This expands our association’s network to 21 regional and local paving associations. SWCPA was founded in 1990 as the Western States Chapter of ACPA and was reorganized in 2009 as an independent local state association. SWCPA and its local partner, California-Nevada Cement Association focus their efforts on DOT customer-facing matters related to technology transfer, technical service, advocacy and marketing of concrete and other cement-based pavement products in California and Nevada. We are excited about the opportunities this affords to both SWCPA and ACPA.
**Updating Long-Life Dowel Standards**

The ACPA Jointing Task Force drafted revisions to AASHTO dowel standards so they are applicable to all possible pavement dowels (including alternate materials and shapes) available from industry today. The goal is to provide a single specification and test regime appropriate for any paving dowel (conventional or “long-life”; solid, tubular or plate; metallic or composite). The project includes recommended revisions (or alternatives) to current AASHTO M254 and T253 Standards. Specifically, testing of individual dowels cannot provide an accurate indication of the abilities of newer dowels to provide acceptable (or improved) performance. Recognizing this need, the Jointing Task Force developed a load-deflection test protocol for dowel groups. Validation testing of the protocol is underway and once completed the new specification will be released in 2020.

**Overlay Summit Identifies New Plan**

For most of the past 10 years, ACPA staff and local promoters, along with staff and consultants representing the CP Tech Center, have gathered for an annual concrete overlay summit. The summit in 2019 was a great opportunity for peer-to-peer discussions about design and construction issues, including pavement performance, durability and quality that contributes to the overall health of the concrete overlay market.

The meeting was hosted by ACPA in Rosemont and participants shared perspectives on key issues and opportunities in their respective states/regions. A new game plan was developed to shape the future direction of overlay technology development and implementation efforts. Simplifying concrete overlay design and option selection was identified as the highest priority goal.

**Performance Engineered Mixtures**

Nineteen states and industry are now working with FHWA to implement available new technology and to continue the learning process for performance engineered mixtures (PEM). Your Association is engaged in this effort from a technical and engineering perspective, as well as through a monetary contribution of $250k over 5 years.

The PEM vision is to develop a better way of accepting concrete for paving. This includes choosing parameters that matter more to durability, finding tools to measure them (including some new tests), choosing appropriate test limits and developing protocols for applying the tests for purpose, consistency and repeatability. PEM is trying to improve the delivery of concrete pavements at a lower risk of premature material failures, while allowing for contractor innovation, adaptability for local conditions and an appropriate level of inspection/testing.

At nearly halfway into the 5-year program, some important guidelines have been prepared, and a provisional standard—AASHTO PP84—has also been developed.
NATIONAL TRAINING

ACPA routinely provides training for members, private owners and specifying agency personnel. We employ all approaches to reach people, including, traditional face-to-face training courses, webinars and online, on-demand training. On average 1000 people are trained by ACPA National online programs annually and more than 3000 others are trained at chapter and national hosted events. ACPA National assists with presentations at most local concrete paving forums...

2019 Airfield Pavement Workshop
The Airfield Design and Construction Workshop was held in October in Ft. Lauderdale, FL. Led by Gary Mitchell and key members, the workshop program included technical presentations by subject matter experts with practical experience in airport design and construction. Experts from the USACE Transportation System Center, the headquarters office of the FAA, and companies with direct involvement contributed their viewpoints. The annual training encourages a free exchange of information about current best practices, interpreting specifications, and applying practical information for FAA and military pavement projects. The workshop this year included 65 participants, including owners’ representatives/engineers, and contractor personnel.

On the Road with PavementDesigner.org

Continuing our efforts to provide training on concrete pavement design and build awareness of design resources, Eric Ferrebee delivered technical presentations, workshops and webinars to a variety of audiences, including a special session at the 2019 American Concrete Institute Convention and Exposition in Cincinnati. The training sessions are tailored for the audience needs but typically focus on design of concrete streets and local road pavements and overlays, roller-compacted concrete and other cement-based pavement solutions.

A new video that shows the features and benefits of the software can be viewed here: PavementDesigner.org.

Central Plant Manager Training Pilot
With support from members Duit Construction and RexCon, we presented a pilot plant manager training course for Duit personnel at Tinker Air Force Base in September. Personnel from the Air Force Civil Engineer Center (AFCEC) and USACE audited and provided feedback on the course. The pilot training was approved to meet specification requirements for the project and served as another step in our development of fully approved military training. ACPA has been working for several years toward the goal of an accredited training program and plant manager training for central mix plants used on military paving projects. We also have prepared a central plant certification checklist.
COMMUNICATION & MARKETING

ACPA pursues a variety of strategies to support and actively encourage the use of concrete pavement and cement-based paving solutions. In 2019 we continued delivering our long-standing programs and introduced new ones as part of our new promotion plan funded by a grant from PCA...

Concrete Pavement Progress Readership Grows!
In 2019, we published four issues of Concrete Pavement Progress (CPP) to spotlight projects, members and technology. The magazine is sent to over two thousand members and specifiers and is also seen in digital format by thousands more. CPP was ACPA’s first publication (1964) and remains our flagship means of communicating project successes and promoting our member’s quality work. (Members and affiliated chapters are encouraged to share story ideas for future issues!)

“It’s What We Do” Video Pays Tribute to Crews
Our members’ stories are about concrete pavement construction, rehabilitation and preservation... but they are also about so much more.

[Click here to view on YouTube.]
[Click here to request a copy of this video (MP4)].

Coordinated Pavement Promotion Plan
We began implementation of our long-term plan to advance demand for concrete and cement-based pavement solutions through new strategic promotion initiatives this year. The plan includes more boots on the ground promotion and better marketing tools to improve and grow the US paving market. We are grateful to PCA for the opportunity to pursue this plan and are working toward improved market measures and key performance indicators for the objectives. Strategic efforts and accountability measures will drive our results.

Phase 1 – Phase 1 is underway, and per the plan we hired a Vice President of Marketing, Scott Mueller, to lead the program and support the chapters. We also added local “Boots on Ground” in six targeted states.
Phase 1 Goals –

6 States
6 Million square yards increase annually on average
500 Thousand additional tons of cement annually

Phase 2 – Phase 2 has not yet been funded, but it includes additional boots on the ground as well as plans to develop pavement promotion campaigns and new collateral materials consistent with the feedback at the Paving Promotion summit in 2018. The campaigns are intended to build upon existing efforts of ACPA and our partners and are not intended to supplant or replace current efforts. Based on the promotion summit we identified five key areas of focus.

The first is coordinated promotion branding and messaging. In 2019 we started developing new ideas for messaging that will help us in this area and creating a culture of two-pavement systems at the agency/policy level. Our goal is that concrete is considered for every project.

National technical support to chapters is aimed to provide national staff expertise for all cement-based paving solutions, train local promoters on promoting all applications, develop improved promotion tools for each product and strategically apply third-party information (either CP Tech Center or MIT) for credible customer-focused materials. Our new committee structure includes staff expertise on loan from our partners at PCA to help support the commercial/industrial segment.

Education, training and workforce development are areas that we will grow going forward under this plan. Training will be multi-faceted and aimed at concrete pavement promoters, practicing engineers and practitioners, professors, students and industry workers/laborers. Plans for more training are incorporated in the six target promotion states implemented in Phase 1.

So that we can continue to innovate, we have established a team to explore future research/innovation with an eye toward continuous improvement and product development as part of our new committee structure. The team will build off our recently developed Vision 2040 effort and maintain a strong connection to the CP Tech Center, MIT and other technology development and implementation partners.

Lastly, we will maintain our commitment to supporting PCA on effective federal advocacy related to the paving market. ACPA will lead efforts to engage and influence relevant agencies in the pavement space (e.g., FHWA, FAA, TRB, AASHTO) to impact regulations, rules, policies and legal requirements to create a level playing field.
MARKET METRICS

ACPA collects state market data estimates from chapters and state associations and couples this with bid letting data to develop a square yard market measure for concrete paving. The data are used to show relative change in market size of concrete paving...

**Square Yards Steady**
While each state may experience ups and downs in market size from year to year, the total market is relatively steady around 50 million square yards of concrete paving nationwide. In 2018, the market rebounded to 51.25 million square yards after dipping slightly below 48 million square yards in 2017. Projections for the remainder of 2019 are for a market volume of 51.5 million square yards. The current national projection for 2020 is for a 50.2 million square yards, or a slight decrease of 2.5%. (The change is attributed to several strong state reconstruction or new alignment programs that are completing in 2019.)

**Overlay Volume Growing**
Overlays remain a growing component of the concrete paving market. In the five-year period from 2010 to 2014 overlays were 11.3% of the overall concrete paving market. In the last five years, that figure has grown to 12.4%. Concrete overlay technology development, implementation and education by ACPA, ACPA Chapters and the National Concrete Pavement Technology Center have been instrumental in developing this market. This work has also been in partnership with FHWA, which has contributed funds to the technology transfer efforts through the ACPA-crafted Accelerated Implementation and Deployment of Pavement Technology program included in MAP-21 and the FAST Act. Moving forward, we look toward to an even bigger push to implement concrete overlay technology in more states across the country.
PARTNERS & COLLABORATION

The success of concrete pavement promotion relies on the collaborative outcomes of ACPA and its many partners. In 2019, ACPA continued to hold itself to a high standard of excellence in our collaborative work...

National Concrete Pavement Technology Center (CP Tech)

ACPA continued its strong partnership with the CP Tech Center in 2019. In anticipation of successful appropriation for our Airfield Pavement Technology Provision, which was included in the FAA Authorization in October 2018, we facilitated a meeting between CP Tech Center and FAA officials at the FAA Test Center in Atlantic City, New Jersey. Our plan is to couple the CP Tech Center to researchers within FAA to advance improvements to specifications for mixtures used in commercial airfield construction, among other airfield pavement priorities. With the just-passed appropriations bill, FAA has another $6M per year for their Airfield Technology Research Program, and a clear understanding of our industry’s shared priorities for the CP Tech Center.

National Concrete Consortium (NCC)

NCC is the premier gathering of concrete-focused state DOT materials and design engineers and industry groups. It remains an excellent venue for ACPA, chapters and members. NCC has expanded over the years to include toll highway authorities, manufacturing companies, contractors and individuals with an interest in concrete pavements and bridges for highway and roadway applications. Over 30 states are represented (see map). NCC is one of the best networking opportunities and one that offers a unique opportunity to meet with DOT materials engineers and other officials in one place to discuss key issues in common. 2019 meetings were held in Denver, CO and Kalispell, MT.

IGGA/ACPA Concrete Pavement Preservation Partnership (CP3)

2019 was another solid market year for our diamond grinding and concrete pavement preservation industry partners. ACPA and IGGA have collaborated since the 1990’s to share in the role of promoting the benefits of concrete pavement preservation. IGGA/ACPA CP3 continued its focus on leveraging education and research opportunities focused on pavement preservation with the goal of codifying Concrete Pavement Preservation treatments as part of local, state and federal pavement/asset management systems. We will draw upon the information generated over the past ten years while IGGA/ACPA CP3 played a leading role in researching and improving the diamond grinding product, including development of the Next Generation Concrete Surface (NGCS). These data are being used for both constructive and defensive arguments to ensure concrete pavement preservation is handled fairly in DOT pavement/asset management systems.

MIT Concrete Sustainability Hub

ACPA’s collaboration with MIT expanded in 2019. Leif Wathne, Jim Mack, CEMEX, and David Howard, Koss Construction, were appointed to represent concrete paving industry interests on the MIT Industry Advisory Committee. MIT’s pavements research platform consists of two interconnected research topic areas that seek to improve the quality of the data and the methods used to make infrastructure preservation, rehabilitation, and reconstruction decisions. Research topics will be closely connected to implementation activities for streamlined life cycle economic and environmental assessments used by DOTs for pavement selection decisions.
NETWORKING THROUGH ACPA

An organization is only as good as its people. Fortunately for ACPA, our members and staff enjoy a special camaraderie and fellowship that epitomizes the sum being greater than the individual parts...

Emerging Leaders Group

With two additional members to the program, our Emerging Leaders Group (ELG) met in 2019 at The Center/Heritage Group in Indianapolis this Spring. The key focus of the meeting was to advance agendas of the ELG working groups, which were started last year to focus on Technology, Specifications, Work-force Development and Marketing. The ELG also gathered for meetings and social events at the ACPA mid-year and annual meetings. Two members of the inaugural group were elected to the Board of Directors for 2020, proving the value of inviting and empowering the next generation of ACPA members.

Mid-Year Meeting

The event in Charleston, SC was characterized by a change management workshop led by new Marketing Vice President, Scott Mueller, as well as interesting and productive task force meetings and networking fun at historic venues! The event featured a team-building exercise, robust discussions, and breakout sessions where participants had lively discussions about the challenges and opportunities facing the industry. Nearly 120 attendees marked another strong year of participation.

Transportation Research Board Hospitality

A steady stream of guests enjoyed our always popular reception during the annual Transportation Research Board’s (TRB’s) 98th annual meeting. ACPA Chairman Jim Mack, CEMEX, welcomed hundreds of guests. The reception, now considered an important tradition among transportation professionals attending TRB, takes place at the prestigious and historic Willard InterContinental Hotel. It is an ideal opportunity for ACPA members and chapters to express thanks and appreciation to the diverse group of people whose common bond is dedication to the advancement of concrete pavements and transportation through research and technology development and implementation.
New Committee Structure Approved
The Board of Directors approved a reorganization of the ACPA committee structure for introduction in 2020. The new concept aligns with our market segments and will better engage members to drive the Association’s direction. The reorganization clearly signals what ACPA is all about as it reflects our primary markets and key functional areas.
Staff Expands in 2019

We were excited to bring on new staff members to the ACPA national team for the first time in many years. Replacing longtime team members is always challenging, but with new energy and new skills our new team members are quickly becoming great assets to the membership and our team culture.

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“You can achieve only that which you will do.”
"Nobody who ever gave his <or her> best regretted it.”

George S. Halas

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Scott Mueller – Supported by our promotion plan, we were pleased to add Scott Mueller in April to lead our new marketing and promotion plan efforts. Mueller’s previous professional experience includes global, senior marketing and strategy leadership roles in companies where he blended marketing and technology to develop and implement new strategies. He is leading the implementation of the promotion plan in target states supported by the investment from PCA, as well as developing new marketing programs that will be effective for all promotion affiliates.

Amber Davis – Amber Davis was named as ACPA’s new Office Administrator. In this role with the Association, she is assisting staff with project management and other project support, responding to member and other customer emails, fulfilling literature/information requests, and helping maintain ACPA’s membership information. She also assists with seminar and training registration; front office duties and programs; and event and trade show planning and support.

Chrissy Mysko – Chrissy Mysko has been named as ACPA’s Marketing Communications Coordinator. In this new role, she will be working to increase overall marketing effectiveness. Examples of projects she will be supporting include developing content and driving traffic to ACPA’s digital communications tools, including websites and social media, as well as assisting with content development for ACPA’s periodicals. Through her efforts we expect to enhance social media reach and response. Chrissy also will assist with trade shows, training programs and event planning.

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American Concrete Pavement Association is the national trade organization leading the promotion of concrete paving, and aligning its members, chapters/state paving association affiliates and partners for effective and valued concrete pavement promotion, advocacy and technical support.