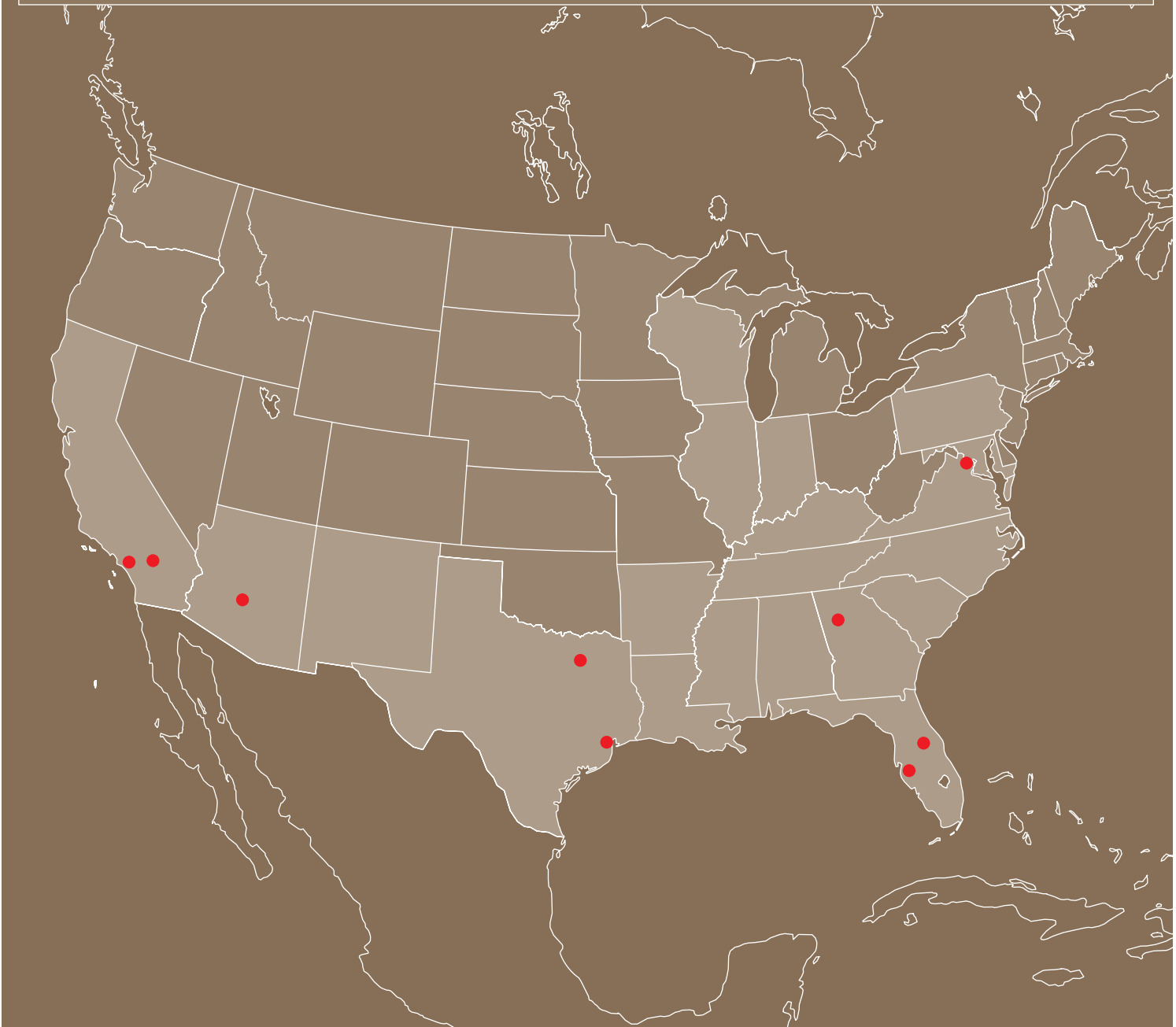


## Strategic Locations in Growth Areas

We have a market presence in 9 of the top 10 metropolitan areas that demographers expect will experience the largest absolute growth in population in this decade:

- Atlanta, GA
- Dallas, TX
- Houston, TX
- Los Angeles, CA
- Orlando, FL
- Phoenix, AZ
- Riverside/San Bernardino, CA
- Tampa, FL
- Washington, DC



You have to be where you need to be: near growth centers, near the action. Even a quarry that seems remote must in fact be strategically located.

In those areas without quarry-able stone, such as below the “fall line” ringing the Gulf Coast, multiple modes of transporting

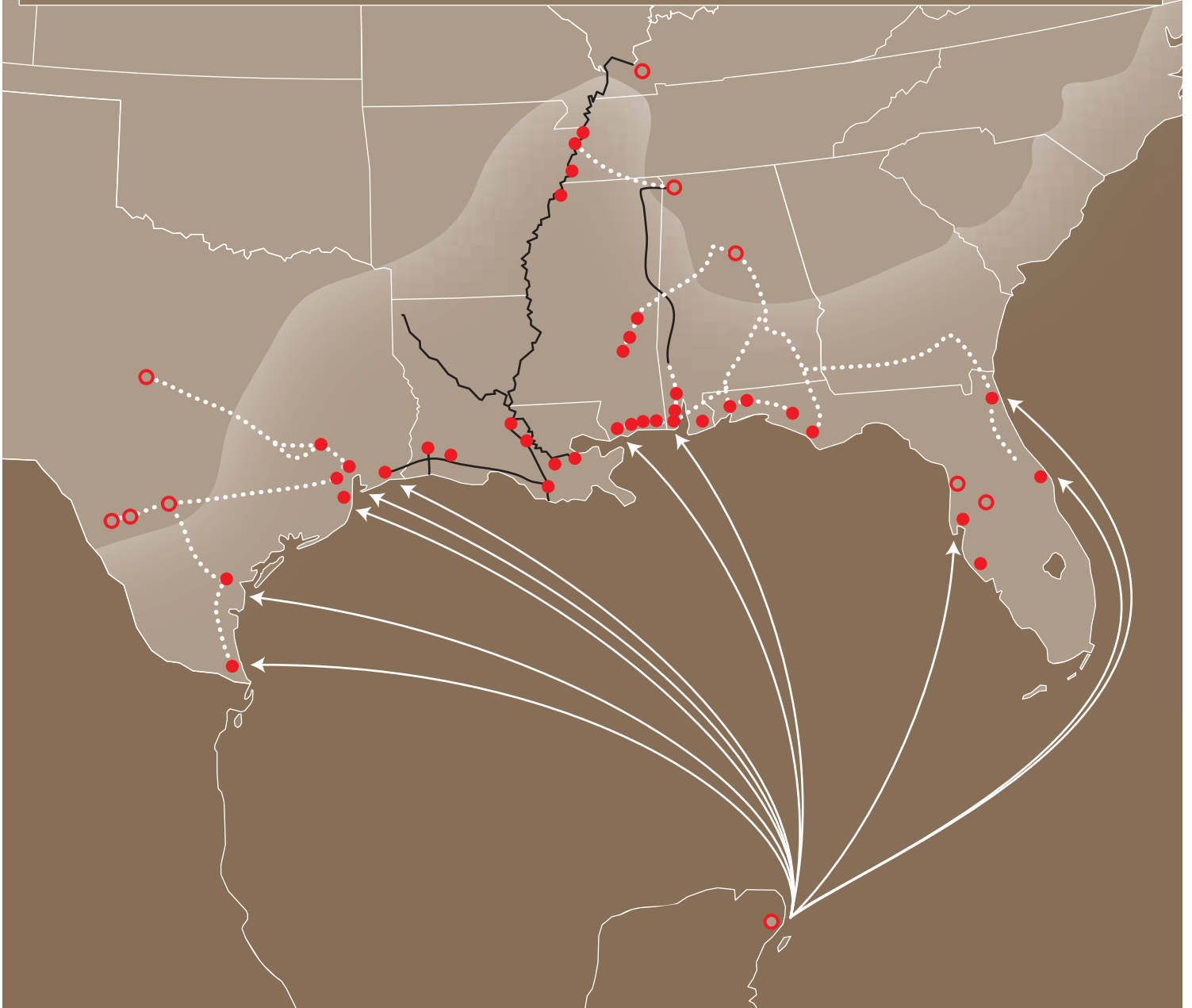
aggregates can come into play. For example, an obliging waterway can let a remote quarry serve distant growth centers down river, or if you’re clever and resourceful, across the Gulf. But then the same rule applies to where the aggregate lands. If you have to truck it more than thirty miles or so, the economics often work against you.

HERE’S WHEN THERE’S VALUE IN THE GROUND.

## Gulf Coast Distribution System

Vulcan's comprehensive distribution network serves growing Gulf Coast communities from facilities throughout the Southeast and one in Mexico. There is little indigenous stone along the Gulf Coast as it is below the geologic fall line (the boundary of bedrock geology).

- Quarry
- Sales Yard
- Fall Line
- ..... Rail
- Barge
- Ship



That's what distinguishes our business in the marketplace. Vulcan has the advantage of location. It's the key to our value as a business, and as an investment over the long term.

Vulcan's reserves and operations undergird this country's growth centers. We are well positioned to run this essential,

irreplaceable, value-generating business that is focused on the long term.

Vulcan is here. And will always be here. This presence secures the long-term health of the business.

VULCAN IS WHERE WE NEED TO BE...AND GROWING.