

# 2018 ANNUAL REPORT

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## BUILT TO LAST



**Michelle O'Neill**

Senior Vice President,  
Global Government Affairs & Sustainability,  
Alcoa and Aluminum Association Chair

This is an  
industry  
built to last.

The cover of this year's annual report features an iconic image -- the cast aluminum capstone set atop the Washington Monument in December 1884. Just a few years later, the modern aluminum industry was born. And more than a century later, it remains an enduring part of the American landscape. The capstone has taken a few hits over the years, and so has our industry. And yet aluminum marches on -- growing markets, investing in the future and ever adapting to changes.

This is an industry built to last.

An important part of aluminum's collective legacy is the Aluminum Association. For more than 85 years, the Aluminum Association has served as the voice of the aluminum industry in the United States. That voice is more important today than perhaps ever before.

As we tackle fundamental issues that will impact the industry for years if not decades to come -- from global trade to fuel economy standards to sustainability and recycling -- the need for a united industry, speaking clearly and loudly, becomes all the more apparent.

In these pages, you will learn how the Aluminum Association is helping the industry do just that. In 2018, the association saw successful outcomes in two trade enforcement actions against unfairly subsidized Chinese aluminum foil and common alloy sheet. We successfully framed the debate about the safety of vehicle mass reduction as part of the ongoing fuel economy midterm review. We trained more than 120 aluminum industry workers on the latest in casthouse safety. We increased our footprint and presence in Washington, working with the Aluminum PAC and Congressional Aluminum Caucus. And we raised the profile of the industry and our issues with regular coverage in top-tier media, including *The Wall Street Journal*, CNBC, POLITICO and *Bloomberg Businessweek*.

This is just a sampling of what we were able to accomplish together in 2018. And we hope you'll take a moment to learn about more of our efforts in the pages ahead.

We look forward to additional great things for aluminum in 2019.

Sincerely,

*Michelle O'Neill Heidi Brock*



**Heidi Brock**

President & CEO,  
The Aluminum Association

The voice  
for the  
aluminum  
industry.

## THE ALUMINUM ASSOCIATION WILL:

- Drive communications that aggressively promote aluminum, while developing stakeholder champions for its sustainability advantages.
- Provide timely, relevant industry statistics and information on emerging issues for enhanced industry transparency.
- Create, maintain, monitor and advocate for standards and technical documents that encourage the use of aluminum.
- Successfully advance regulatory and legislative policy in state, federal and international arenas.
- Convene forums on emerging and relevant issues in order to strengthen the industry.
- Facilitate the sharing of best practices in enhancing global health, environment and safety performance.

“The Aluminum Association promotes the production and use of aluminum as the sustainable material of choice.”



### 2018 BY THE NUMBERS

**692,000** workers supported by U.S. aluminum industry

**\$3B+** invested since 2013

**399** aluminum plants in USA

**39** states with aluminum presence

**550** Registered Alloys (and counting)

**50** Aluminum Caucus members

**\$42,000+** raised for AluminumPAC

**RECORD YEAR** **244** Meeting registrations

**117** Member companies

**↑ 12%** **23.5k** followers across all social

**34** ongoing statistical reports

**200+** policymaker engagements



# IN THE ROOM WHERE IT HAPPENS

## TOP LINE

More than ever, the Aluminum Association is bringing members to the table where decisions impacting the industry are made. And we're working hard, using credible research, data and information, to influence outcomes.



## TWO BIG WINS FOR TRADE ENFORCEMENT

The Aluminum Association led the charge in two significant – and successful – trade enforcement cases in 2018. Early in the year, the U.S. International Trade Commission unanimously concluded that the domestic aluminum foil industry was being harmed by unfairly subsidized Chinese metal, leading to significant antidumping and countervailing duty margins in those markets. And we closed

out the year with a similar finding in the Commerce Department's self-initiated case targeting Chinese common alloy aluminum sheet. By leveling the playing field, companies operating in these markets announced investments of more than \$200 million dollars to improve operations and add U.S. manufacturing jobs. The decisions were a win for the industry – and for rules-based global trade.



Willis Bretz Photography

Aluminum Association members testify at the U.S. International Trade Commission. Above: President & CEO Heidi Brock.

## PROMOTING THE SAFETY OF VEHICLE MASS REDUCTION

The Aluminum Association's automotive market committee, the Aluminum Transportation Group (ATG), engaged in one of the most comprehensive advocacy efforts in the association's history preparing for the release of the administration's revised fuel economy standards. All told, the ATG held 30+ meetings with nearly 75 individuals at more than two dozen government agencies, elective offices, nonprofits and media outlets. We advocated for regulatory certainty in the rulemaking

as essential to continued aluminum industry investment. While the final rule will not be released until next year, the industry made significant headway, particularly in framing the debate around the safety of mass reduction. ATG research, data and messaging on the issue was echoed by groups, including the Consumers Union, the Insurance Institute for Highway Safety and many others.



Rodney Choice Photography



Light-weight aluminum, which many automakers have turned to as a replacement for steel, protects motorists because it crumples and absorbs the impact of crashes better than heavier materials.”

*The New York Times* lead editorial, August 2, 2018

More than 60 Aluminum Association members visited more than 25 offices on Capitol Hill during our annual meeting fly-in.



The Aluminum Association pursued a number of efforts, including an online grassroots campaign, advocating the removal of Section 232 tariffs on vital trading partners.

“While unilateral trade measures can help target narrow problems of unfair trade, collective action is needed to induce systemic change.”

Joint letter by global aluminum associations, April 10, 2018

## A UNITED FRONT ON INTERNATIONAL TRADE

With trade issues near the top of the global political agenda in 2018, the Aluminum Association leaned heavily on relationships with partner trade associations to speak with a united voice on policy issues of shared concern. We joined fellow aluminum associations in Canada, Europe, Japan, Mexico and Brazil with joint letters calling for a renewed focus on China’s growing overcapacity challenges at the G20, and the removal of Section 232 tariffs and quotas on North American aluminum. In June, we joined industry leaders for the Montreal Aluminium Summit in advance of the G7 world leaders meeting to unveil a “roadmap” for a sustainable global aluminum market. The roadmap called for a global dialogue and appealed for immediate government-to-government action to address persistent aluminum overcapacity in China. The final G7 communique committed to addressing the issue.



Global aluminum association leaders from Europe, Canada, the United States and Japan at the Montreal Aluminium Summit.

## JOINING THE FIGHT TO TACKLE NATION'S RECYCLING CHALLENGES

The Aluminum Association joined EPA Acting Administrator Andrew Wheeler and a number of major brands, foundations, nonprofits and trade associations active in recycling for an event on America Recycles Day. Participants signed a pledge to work proactively in the coming months and years to improve the nation's recycling system. A number of macro-trends, including changes to global export policies and low commodities prices, have strained recycling infrastructure in the United States in recent years. While aluminum remains one of the most recycled materials, each year nearly \$800 million worth of aluminum cans end up in landfills. The Aluminum Association is committed to working with members and other stakeholder groups to improve recycling rates across the board.



“We will work together to build on our existing efforts to address the challenges facing our nation’s recycling system and identify solutions that create a more resilient materials economy and protect the environment.”

America Recycles Day Pledge signed by the Aluminum Association

# UNITED STATES OF ALUMINUM

## TOP LINE

Aluminum is a key element of the nation's manufacturing base. The Aluminum Association works with its members to highlight the impact of this critical industry in Washington DC and around the country.



## ALUMINUM DRIVES AMERICAN JOBS

The Aluminum Association released new economic impact numbers in 2018 showing that overall direct jobs rose by 3.5 percent between 2013 and today, and now total 162,000. Despite continued declines in the primary aluminum sector, record demand for aluminum products buoyed growth in mid-and-downstream

aluminum production and processing. When indirect and induced impacts are included, the aluminum industry supports nearly 700,000 U.S. jobs and \$174 billion in total economic impact – nearly 1 percent of the nation's GDP.

MORE THAN  
**692,000**

WORKERS ARE SUPPORTED BY THE U.S.  
ALUMINUM INDUSTRY WHEN YOU INCLUDE  
DIRECT, INDIRECT AND INDUCED JOBS



“Integrated supply chains in North America have strengthened the U.S. aluminum industry, creating jobs and economic growth for our constituents.”

Congressional Aluminum Caucus co-chairs Rep. Larry Bucshon (R-IN); Rep. Suzan DelBene (D-WA); Rep. Bill Johnson (R-OH); Rep. Dave Loebsack (D-IA); September 26, 2018

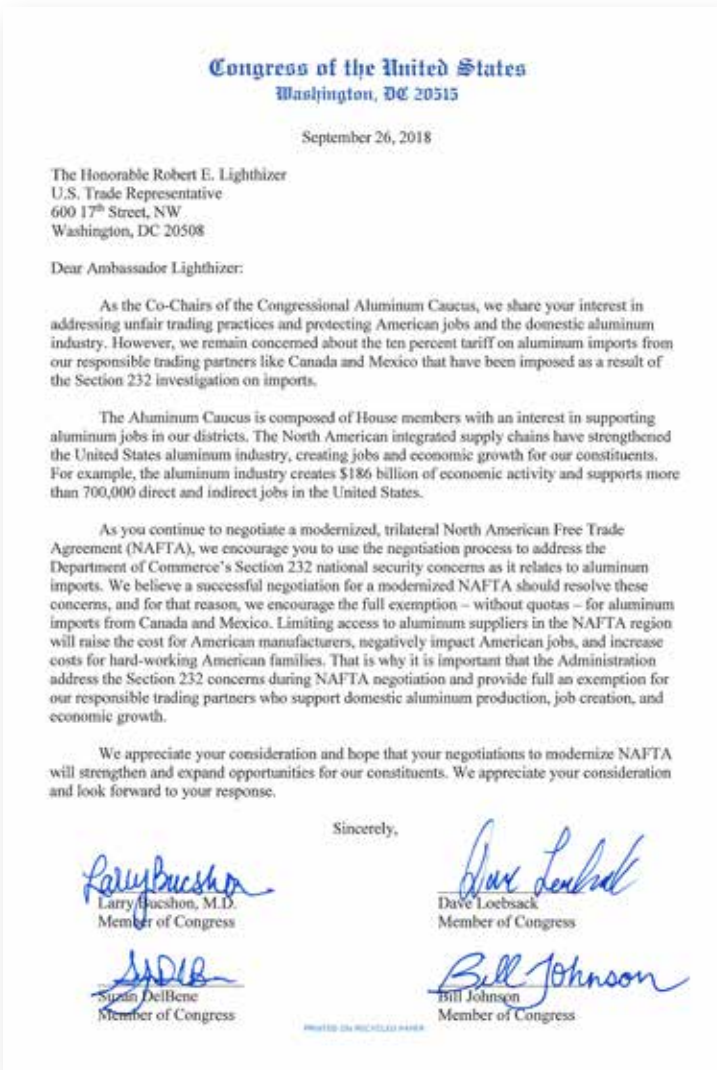


## CONGRESSIONAL ALUMINUM CAUCUS MAKES AN IMPACT

The bipartisan Congressional Aluminum Caucus is the premier forum on Capitol Hill educating policymakers about the U.S. aluminum industry and every aspect of the metal's production and use - from mining to manufacturing to recycling. In 2018, the caucus continued to play a major role in advancing the aluminum industry. In the spring, members of the caucus hosted Secretary of Commerce Wilbur Ross for a closed-door briefing on the administration's tariff policy on aluminum. And in the fall, the four caucus co-chairs sent a letter to U.S. Trade Representative Robert Lighthizer calling for a quota-free tariff exemption on aluminum in North America.



U.S. Senator Shelley Moore Capito (R-WV) visits member company Constellium's plant in Ravenswood, WV.





Weber Metals

Unveiling of a new 60,000 ton forging press at Weber Metals in Long Beach, CA

## INDUSTRY CONTINUES TO INVEST AMIDST RECORD DEMAND

The domestic aluminum industry is enjoying all-time record demand – and nearly a decade of year-over-year demand growth – in the U.S. Companies are increasingly turning to the lightweight, strong, sustainable metal to make great products even better. Despite challenges in certain segments, the overall industry remains healthy and continues to invest in modern manufacturing – creating jobs and opportunities for workers around the country. In 2018 alone, the industry announced or opened more than \$1.2 billion in investments across the United States. This is in addition to billions invested by the industry dating back to 2013 to capture demand growth in the transportation sector.



Novelis

Groundbreaking of a Novelis greenfield aluminum automotive plant in Guthrie, KY



“Today’s ribbon-cutting is the start of something big – something big for aluminum, something big for this community and something big for our country.”

Heidi Brock, Aluminum Association President & CEO;  
Novelis groundbreaking event, Guthrie, KY; May 14, 2018



The aluminum industry has committed & invested more than

**\$3 BILLION**

in domestic manufacturing over the past 5 years, driven by growth in automotive and other sectors.

## DESIGN SEMINAR EDUCATES ON USE OF ALUMINUM IN DETROIT

The Aluminum Association’s automotive market committee, the Aluminum Transportation Group (ATG), hosted its inaugural Aluminum Design Seminar in Novi, MI this year. The sold-out event welcomed engineers from Ford, General Motors, Toyota and Fiat Chrysler Automobiles. The two-day course focused on a wide range of topics, including an introduction to aluminum in automotive; corrosion and repair; aluminum sheet and metallurgy; stamping, forming and joining; extrusion and structural castings. At the end of the seminar, attendees left equipped with the knowledge to produce new, technologically advanced vehicles that are lighter, more efficient, better performing and safer with the help of aluminum. The ATG plans to host a series of similar seminars in 2019.



The Aluminum Transportation Group hosted its inaugural Aluminum Design Seminar in Novi, MI.

# ALUMINUM IN ACTION



Rodney Choice Photography

The association recognized Ken Willings, Senior Vice President of Health, Safety & Environment for Aleris, as the 19th winner of the Marlan T. Boultinghouse Award for service to the North American aluminum industry.



Rodney Choice Photography

Members enjoyed a remarkable view of the U.S. Capitol and the National Mall from The Embassy of Canada's roof at a reception during the annual meeting.



Dave Bohrer/National Association of Manufacturers

The National Association of Manufacturers' (NAM) Council of Manufacturing Associations recognized the Aluminum Association as a top 10 manufacturing association to work for at its Summer Leadership Conference in Chicago.



Rodney Choice Photography

Leading up to the signing of the United States-Mexico-Canada Agreement (USMCA), the association hosted a briefing for congressional staffers with industry voices, including member Constellium, the Chamber of Commerce, Brewers Association, the Alliance for Automobile Manufacturers, Motor & Equipment Manufacturers Association and International Dairy Foods Association on the wide-ranging impacts of the Sections 232 tariffs on U.S. industry and the USMCA.

The Aluminum Association hosted a sold-out Casthouse Safety Workshop meeting in Indianapolis, IN this September.



Suddhodhan Ghosh



Rodney Choice Photography

Members met with congressional offices to discuss the top issues facing the industry during a Capitol Hill fly-in in October.



Rodney Choice Photography

The association brought experts to the stage to discuss the future of industry workforce and share best practices for recruiting and retaining the next generation of workers.

The Aluminum Association



The association held its spring meeting in Scottsdale, Arizona. Members and association staff took the opportunity to climb nearby Camelback Mountain.

# THE VOICE OF THE ALUMINUM INDUSTRY

## TOP LINE

The aluminum industry was at the center of the conversation in Washington DC and around the country this year as many of our top issues made national headlines. Working with the membership, the Aluminum Association told the industry's story through top-tier media and other communications channels.

## ALUMINUM IN THE NEWS

2018 was another remarkably active year for the aluminum industry with high-profile media coverage to match. The Aluminum Association worked with members to tell the industry's story through seemingly every form of media – from podcasts and television, to print and digital. Over the last year, the association raised the profile of our industry and issues with regular coverage in top-tier media including *The Wall Street Journal*, *Marketplace*, *CNBC*, *The Economist*, *POLITICO*, *Bloomberg Businessweek* and many other outlets.



# TIME FOR ACTION ON CHINESE ALUMINUM OVERCAPACITY

The Aluminum Association worked throughout the year to get the message out -- it's time for action on Chinese aluminum overcapacity. Despite across-the-board Section 232 tariffs on virtually all imported aluminum, unfairly subsidized production growth in China continues unabated. While the industry shares the administration's desire for a strong and thriving aluminum sector in the United States, we differ on some tactics and continue to encourage targeted trade action focused on China rather than vital trading partners like Canada, the EU and others who play by global trade rules. Now is the time for the administration to move toward a negotiated agreement with China to tackle the overcapacity challenge once and for all.



## JOIN ALUMINUM NATION

In the midst of a big year for aluminum advocacy, the Aluminum Association relaunched its grassroots program Aluminum Nation. It is now easier than ever to take action on behalf of the nearly 700,000 workers supported by the U.S. industry. Text Aluminum to 52886 to join Aluminum Nation and visit the Aluminum Association's action center online to see active advocacy campaigns.



The Aluminum Association told the industry's story through multiple media channels in 2018 including print, broadcast, online and social.

TAKE ACTION: TELL YOUR LEGISLATORS

**NO ALUMINUM TARIFFS.  
NO ALUMINUM QUOTAS.  
FOCUS ON CHINA.**



### China's Aluminum Capacity Growth Continues Unabated

Across-the-board tariffs are not addressing China's unfairly subsidized aluminum overcapacity.

Year	Rest of World (mt)	China (mt)
2000	23.2 million	-
2018	32.5 million	45.2 million

Throughout the year, the Aluminum Association used research and data to tell the industry's story with visually compelling infographics.

**Aluminum Association**  
@AlumInumNews

We need permanent, quota-free tariff exemptions for market economies to help meet record demand for #aluminum products. Learn more: [aluminum.org/timeforaction](http://aluminum.org/timeforaction)

### No Tariffs. No Quotas. Focus on China.

Category	Value
U.S. Production	~1.5
U.S. Capacity	~2.5
U.S. Demand	~7.5

- The U.S. has long been unfairly targeted and relies on imported primary aluminum from responsible trading partners.
- Without these imports, the U.S. cannot meet growing demand for aluminum.
- Across-the-board tariffs and quotas put at risk the 87% of U.S. aluminum industry jobs on non-end-use domestic processing.
- To help meet record demand for aluminum products, we need permanent, quota-free tariff exemptions for market economy countries.

[www.aluminum.org/timeforaction](http://www.aluminum.org/timeforaction)

12:00 PM - 30 May 2018

100 Retweets 144 Likes

# YOUR INDUSTRY, YOUR ASSOCIATION.

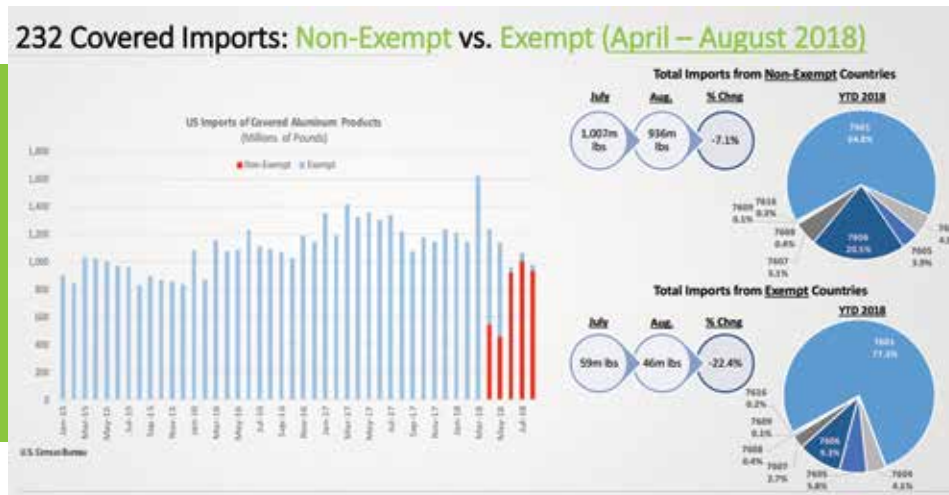
## TOP LINE

For decades, the Aluminum Association has supported the aluminum industry with accurate and reliable statistics, technical data and cutting-edge safety best practices. Even amidst unique market uncertainty, we remain committed to these essential programs.

## NEW STATISTICS REPORT SHOWS NUMBERS BEHIND TARIFF IMPACT

Following the Trump administration's decision to apply a 10 percent tariff on most aluminum and aluminum products entering the United States in the spring of 2018, the Aluminum Association ramped up efforts to provide information and statistics on the decision's impact. The monthly U.S. Aluminum Import Monitor tracks U.S. import data specific to aluminum products covered

under the Section 232 tariffs. This report joins a suite of more than two dozen statistical reports covering nearly every aspect of the domestic aluminum industry – from primary production to end markets. A key benefit of membership, the association's business information and statistics program helps with business decision-making and analysis.

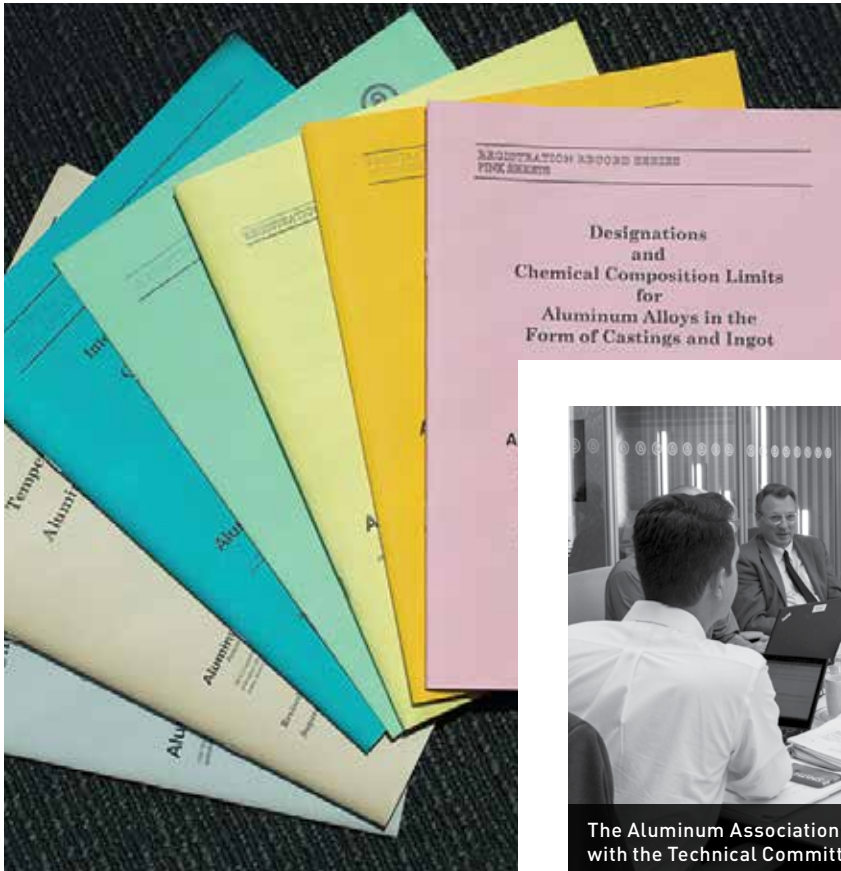




## FULL REFRESH OF INDUSTRY RAINBOW SHEETS

This year, the Aluminum Association updated all seven of its “rainbow sheets,” providing the latest designations, chemical compositions and mechanical properties for all registered aluminum alloys. These documents provide foundational information essential for producers and users of aluminum and aluminum

products. The rainbow sheets are a primary work product of the association’s Technical Committee on Product Standards, which is the leading primary standard setting-body for aluminum produced and fabricated in the United States. They are available for purchase in the association’s bookstore at [www.aluminum.org](http://www.aluminum.org).



“The association’s Standards & Technology Department creates the backbone of a vital communication system that facilitates the production, sale and use of aluminum.”



## REGULATORY ENGAGEMENT RAMPS UP

In 2018, the association increased efforts on several of the industry's regulatory priorities through direct engagement with the Environmental Protection Agency (EPA). In addition to significant outreach to the agency on automobile and light truck emissions revisions, the association submitted formal comments on a number of critical issues including air and water initiatives that impact the aluminum industry in the United States. For example, the association supported significant revisions to the aluminum water quality criteria to best align with an accurate assessment of aluminum's behavior in water. In addition, the association

advocated for changes to how sulfur dioxide (SO<sub>2</sub>) ambient air concentrations are calculated that would ensure continued public health protection while avoiding installation of unnecessary emissions control equipment for smelters. In all, the association urged the agency to use the latest and most credible science in determining rulemakings. While not always front and center, the association's collaborative work with the membership on these critical issues is a core priority of the Aluminum Association and essential to the industry's continued competitiveness in the United States.



EPA



The Aluminum Association



The Aluminum Association



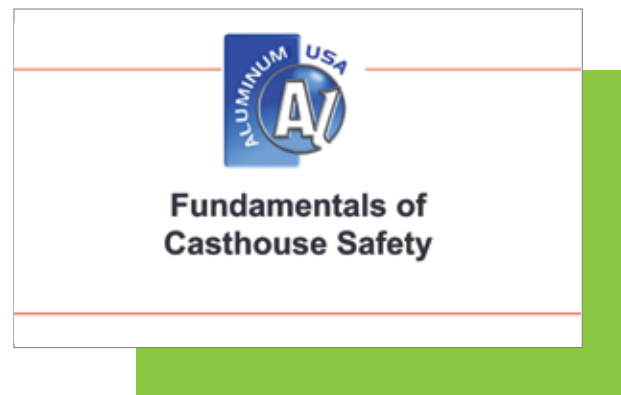
**Aluminum Association members and staff met with policymakers and regulators throughout the year to highlight key issues facing the industry**



Rodney Choice Photography

## WORKSHOPS EXPLORE LATEST ADVANCES IN CASTHOUSE SAFETY

Worker safety continues to be a top priority for the Aluminum Association and the industry. At the association's September 2018 Casthouse Safety Workshop in Indianapolis, industry experts led 120 attendees through interactive sessions on proper casthouse safety techniques, including a Molten Metal Simulator created by Novelis. The simulator uses air pressure and water to mimic a molten metal explosion and gave attendees a safe way to see the magnitude of an explosion as well as understand the importance of following all safety procedures and wearing the correct personal protective equipment. In further support of industry safety, the association released a 40-minute online training module, Fundamentals of Casthouse Safety, which is designed to provide an introduction to the principles of aluminum casting safety for personnel not involved directly in the casting process.

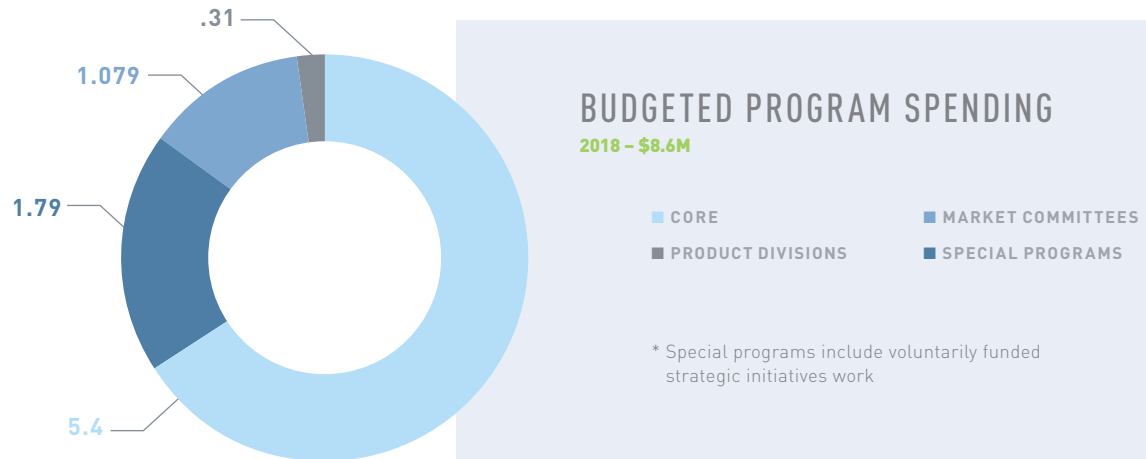
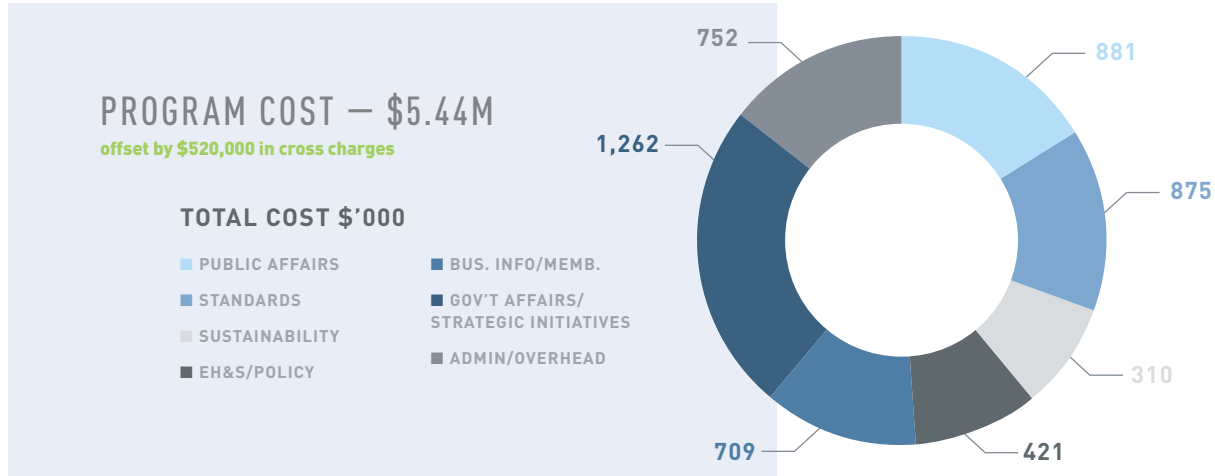


## DR. OZ: ALUMINUM FOIL MAKES THE GRADE ON SAFETY



The popular daytime TV show Dr. Oz took a deep dive at Internet rumors about links between the use of aluminum foil and Alzheimer's Disease. Dr. Oz hosted neurologist Dr. Ayesha Sherzai and Julia Collin Davison from America's Test Kitchen to talk through the science of the issue. Dr. Sherzai pointed out that the amount of aluminum consumed through normal use in cooking with foil and other aluminum products is minimal and easily excreted by the body. She cited World Health Organization studies on the issue, and Oz included a statement the association developed in consultation with the International Aluminium Institute (IAI). Visit the show's website for links to resources with more information, including the IAI's new website on aluminum and human health. Dr. Oz concluded the segment saying, "If you love your foil, use it. But don't get wrapped up in all that alarmist clickbait."

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We would like to thank those who generously contributed to the Aluminum PAC in 2018. Their financial support will greatly help us advance the interests of the domestic aluminum industry.

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\*Denotes Executive  
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