MESSAGE FROM THE **CHAIRMAN AND PRESIDENT**

Amid generally improving conditions in the aluminum industry during 2010, the Aluminum Association worked to build momentum on an array of initiatives critical to our members—including sustainability, membership recruitment, and advancing the competitive position of the industry via the efforts of our product, technical, and marketing committees.

A more detailed account of these activities appears in the following pages. But even a glance at the Association “headlines” during the past year shows the solid progress we’ve made in advancing the industry’s interests.

*The Sustainability Initiative is in full gear.* Four technical studies are well under way and a fifth, the aluminum can life-cycle analysis, was completed. The latter confirmed significant reductions in the aluminum can’s carbon footprint, and its data have been accepted by both Walmart and the Environmental Protection Agency.

*The Association has worked to achieve prudent environmental and energy regulations as they pertain to the industry.* The Association effectively represented the aluminum industry in the Energy Intensive Industry Coalition and Recycling Roundtable to address House and Senate legislative initiatives on climate change and energy. Staff engaged the EPA on both primary and secondary MACT with regard to the agency’s review and proposed revisions to emission regulations.

*Membership is growing in both size and scope.* A Membership Development Committee was created and tasked with recruiting new companies to the Association. The Board approved changes to the Association’s bylaws to permit the admission of aluminum distributors as members; our dues structure has been altered to encourage foundries to join.

*New opportunities are being created for members to interact with the broader aluminum industry.* The Association partnered with the Aluminum Extruders Council (AEC) to produce “Aluminum Week”—co-locating the Annual Meeting with AEC and hosting joint sessions and events. This partnership will continue next year.

*Media and web outreach increased dramatically.* Separate “media tours” covering automotive aluminum, packaging, and building/construction made an estimated
80 million TV and radio consumer impressions. Association web traffic increased 30 percent over 2009.

Core programs continued to provide essential industry information to member companies.

- The Association’s Standards and Technology programs helped promote and facilitate the use of aluminum and its alloys; a key technical publication updated in 2010 was the *Aluminum Design Manual*, which is referenced by most U.S. building codes.
- The Health & Safety Committee continued providing mission-critical information to member companies—hosting its annual casthouse safety workshop and publishing the *2010 Molten Metal Incident Report*.
- The Statistics Department—publishing weekly, monthly, annual, and customized reports—remained the principal source for information on the North American aluminum industry.

None of the aforementioned achievements would have been possible without the voluntary work and financial support of our committed membership. For their tremendous efforts over the past year, the Aluminum Association Executive Committee and Board of Directors offer their heartfelt thanks and appreciation.

To *all* our members, we wish you a happy and successful new year.

Steven J. Demetriou  
Chairman and Chief Executive Officer  
Aleris International Inc.  
Chairman, The Aluminum Association

J. Stephen Larkin  
President  
The Aluminum Association
ENVIRONMENT

Climate/Energy Legislation

The Association effectively represented the aluminum industry in the Energy Intensive Industry Coalition and Recycling Roundtable to address House and Senate legislative initiatives on climate change and energy. This included numerous meetings on Capitol Hill and responses on legislative issues, as well as letters to Congressional interests promoting key industry positions on climate legislation. The Association also participated in reviewing various economic impact assessments of climate legislation. Efforts led to substantive improvements for the aluminum industry in the various climate bills and played a role in preventing the enactment of adverse legislation.

Primary and Secondary MACT Developments

A series of meetings and exchanges with the Environmental Protection Agency (EPA) took place on both primary MACT (“PMACT”) and secondary MACT (“SMACT”) to conduct the initial review and revision of preliminary EPA draft MACT rulemaking provisions. For SMACT, there were also meetings and responses to EPA to improve information-collection data-request surveys, and to define requirements for emission testing. Extensive effort on MACT development is anticipated in 2011 as EPA prepares to propose revised MACT and residual risk requirements for both the primary and secondary aluminum industries by November 2011.

Primary Aluminum SSM

The Association, with funding support from the Primary Aluminum Division, filed a legal petition with EPA in early 2010 regarding its interpretation of the decision of the United States Court of Appeals for the D.C. Circuit for start shutdown and malfunction (SSM) requirements under MACT regulations. At issue was the EPA’s position that steady-state MACT emission limits must be achieved during startup periods for primary aluminum potlines. Following extensive negotiations, EPA is-
sued favorable guidance in June 2010 eliminating all the emission-limit requirements on potlines during startup events.

Secondary Aluminum Processing Waste Research Program
The cooperative research agreement between EPA and the solid waste industry was finalized to assess secondary processing waste reactivity and develop best-management plans. A secondary waste sampling procedure and contractual arrangement to receive industrial facility samples and preserve confidentiality for members were finalized. Initial EPA results from the reactivity screening analysis were received and modifications to the EPA research program decided upon. At press time, a Phase 1 report was expected for review from EPA at the start of the new year. Phase 2 will follow with expanded research on reactive waste types identified in Phase 1, including landfill soil reactivity efforts. Phase 2 will also lead to the development of best-management practices for landfill disposal of secondary waste products.

Secondary Aluminum Emission Testing
Reports for the secondary aluminum fine particulate matter (PM) emission profile were finalized.

Greenhouse Gas Regulation Under the Clean Air Act
The Association filed comments on several issues during the course of EPA’s efforts to regulate greenhouse gases (GHGs) under the Clean Air Act, including separate filings:
- Opposing EPA’s GHG endangerment finding;
- Opposing the agency’s “tailoring rule” to set GHG emission regulatory thresholds;
- Opposing EPA proposals to limit CBI protections for GHG reporting requirements; and
- Offering technical corrections for GHG reporting requirements that EPA ultimately adopted.

Boiler and Process Heater MACT Proposal
The Association conducted a survey in February and March 2009 of members’ annealing furnaces and process heaters to establish a basis
for subcategorization in the anticipated EPA Boiler and Process Heater MACT proposal. As a result of this effort, EPA proposed in June 2010 a new Boiler and Process Heater MACT standard that includes for major sources a separate subcategory for “metal processing” furnaces, including annealing, preheat, reheat, aging, and heat treat furnaces. This subcategory, unlike others in the proposal, does not include stringent hazardous air pollution (HAP) emission limits—but merely work-practice requirements.

In August the Association filed comments on the major source and the separate area source Boiler and Process Heater MACT proposals, requesting EPA to expand the definition of the “metal processing” subcategory to include “homogenizing furnaces” to avoid regulatory confusion. A delayed timeline and more moderate set of work-practice requirements and energy efficiency assessments for gas-fired furnaces were also requested. A final rule is anticipated in early 2011.

SO2 NAAQS Proposal

The Association filed comments in January 2010 opposing the EPA-proposed primary (health-based) National Ambient Air Quality Standard (NAAQS) for Sulfur Dioxide (SO2). The Association’s comments supported those of the National Association of Manufacturers and cited major concerns with the proposed short-term one-hour standard that could heavily impact many industrial processes—especially those with relatively short emission stacks. In addition, the standard would likely expand the non-attainment areas of the country substantially, potentially impacting several areas with primary aluminum plants.

EPA issued a final SO2 NAAQS in June 2010 setting a stringent 75-pbpb one-hour standard. EPA added in the rule the intention to determine ambient air compliance through site-specific air modeling rather than the traditional usage of air-monitoring networks. The Association has joined an industry coalition to file suit against the EPA focused especially on the air-modeling provisions that would very likely show more extensive over-predictions of nonattainment. The coalition filed legal petitions against EPA in August.
**Toxic Substances Control Act (TSCA) Inventory Update Rule**

EPA issued a proposed rule in August 2010 to increase the requirements for inventory update reporting (IUR) by eliminating the current 300,000-lb. applicability threshold for downstream exposure data reporting—among other revisions including limiting CBI data protection. Under the proposed rule, all reporting would begin at the same 25,000-lb. threshold for process and use data. The Association filed comments in October opposing the EPA provisions and recommending the agency retract the proposal. The proposal is intended to institute the revisions in time for the summer 2011 deadline of IUR reporting for 2010 data.

**Alumina Refining**

EH&S provided technical assistance in helping the Alumina Association respond to the accidental release of the alumina sludge in Eastern Europe. The Association’s successful communication efforts helped to alleviate public concerns with the domestic alumina refining industry.

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**HEALTH & SAFETY**

**WHO Codex**

The Association successfully represented the industry in global negotiations of the World Health Organization (WHO). The goal of participation is the eventual reassessment of the limits on aluminum-containing food additives that have been adopted by the WHO/FAO Codex Alimentarius. Association personnel have positioned the industry so that a dossier of information on new research can be submitted into the Codex process in March 2011.

**Health Research**

The global aluminum industry benefited from the completion of a decade-long review of aluminum and health issues carried out by Health Canada. Industry-sponsored research was central to obtaining a finding of no adverse health effects from the use of aluminum in the treatment of drinking water.
Casthouse Safety
The Association conducted a successful Casthouse Safety Workshop in Indianapolis in November, attracting 76 participants. Industry experts presented the latest information on the safe handling of molten aluminum for sow casting and charging, as well as DC casting and scrap inspection and melting. New information on the proper application and care of pit coatings was added to the agenda, and recent regulatory developments in the area of combustible dusts were reviewed.

Combustible Dust
The Association submitted comments on the Occupational Safety and Health Administration’s (OSHA’s) Advanced Notice of Proposed Rulemaking for Combustible Dusts. The proposed rule will affect most aluminum production facilities. The aluminum industry has been at the forefront of proactive, voluntary self-regulation in the area of combustible dusts, and our early and comprehensive action has been recognized by the Chemical Safety Board, the National Fire Protection Association (NFPA), and OSHA as a model for industry. The aluminum industry supports the adoption of NFPA standards on combustible dusts, and has urged OSHA to address properly the issues that arise from the use of voluntary industry guidance in a regulatory framework.

SUSTAINABILITY
Increasingly, stakeholders—including manufacturers, fabricators, consumers, and non-governmental organizations (NGOs)—are requiring detailed information about the energy inputs and environmental impacts associated with the materials incorporated into today’s retail products. To that end, the Aluminum Association, under the leadership of its Sustainability Working Group, has begun developing the metrics and methodologies to respond to these informational needs of its customers and product market segments.

The Association’s sustainability initiative involves the assessment and communication of aluminum’s performance throughout its life-cycle, with the goal of developing a complete understanding of:
- The positive contributions that aluminum makes to society’s environmental and economic well-being;
- Any negative economic or environmental impacts associated with its production and fabrication; and
- The balance between these positives and negatives during the life-cycle of the material.

Several studies have been launched as part of this effort, including the aluminum can life-cycle analysis (LCA), a material flow analysis, and an LCA of semi-fabricated aluminum and auto products.
Walmart Scorecard/Aluminum Can Life-Cycle Analysis

Throughout the year, the Association represented the aluminum industry in the Walmart Scorecard Packaging Steering Committee activities and in promoting industry positions in the development of its “Packaging Scorecard” for suppliers. Partly in response to Walmart’s Packaging Scorecard, the Association commissioned and, in May, announced the completion of its aluminum can life-cycle analysis.

One of the most comprehensive LCAs ever conducted by an industry group, the “Life Cycle Impact Assessment of Aluminum Beverage Cans” confirmed significant reductions in the aluminum can’s weight as well as the energy used in its manufacture and its carbon footprint. Upon publication, the Association submitted the study’s associated data sets to both Walmart and the Environmental Protection Agency for their respective database revisions.

Material Flow Analysis

The first phase of the Association’s Material Flow Analysis project was completed, and a draft report produced. The report is currently under review and will be distributed to relevant member companies for further review and feedback. Once the two phases of the project are finished, it will enable the industry to identify the quantity and sources of secondary aluminum, generate reliable overall recycling rates of aluminum, and help the industry understand historical productions and losses of the material—providing a powerful tool for the industry’s resource and sustainability management.

LCA of Semi-Fabricated Aluminum and Auto Products

With the exception of foundry castings, the data collection of which has been contracted to a survey company, most of the required semi-fabrication data has now been compiled. The project, which will be implemented in two separate phases—“cradle-to-gate” and “gate-to-cradle”—will examine the life-cycle of semi-fabricated aluminum and its applications in the automotive and light truck markets, including the production, use, and end-of-life phases.

Beyond these technical studies, the Group also com-
missioned a qualitative research study to shed further light on how executives at selected non-governmental organizations (NGOs) perceive aluminum and the aluminum industry, particularly with respect to environmental and sustainability issues and initiatives. The study was launched at the Annual Meeting in September.

By year’s end, an employee sustainability kit had been completed and was ready for launch early in the new year. The kit will be distributed to member companies to augment their knowledge of aluminum’s environmental, economic, and social sustainability.

**Media Opportunities**

Throughout 2010, the Group identified opportunities to promote aluminum’s sustainable characteristics before lawmakers, non-governmental organizations, and consumers. Highlights of these activities included:

- Four media tours—covering automotive aluminum, Cans for Causes, storm protection, and winterizing the home—made over 80 million network TV and radio impressions in 60 cities nationwide.
- An inside-the-Beltway media buy (both online and print advertisements) aimed at non-governmental organizations netted 1.6 million impressions and drove additional traffic to the Association website.
- Online banner ads touting aluminum’s sustainability were placed on leading packaging-media websites.
- A feature-length article detailing the objectives, methodologies, and conclusions of the aluminum can LCA was published in *Light Metal Age*.

**COMMUNICATIONS/MEDIA**

**e-Communications**

The Aluminum Association’s Internet presence expanded greatly during 2010. The Communications Department commenced “social networking” via the establishment of Twitter and Facebook accounts—posting Association-and industry-specific content approximately five times daily to each. The Association’s RSS feed, launched in February, by year’s end had attracted roughly 90,000 page views. Cumulatively, these efforts helped to drive traffic to the Association website almost 30 percent higher compared with 2009 levels.

The Association’s online buyer’s guide, in its second
year, continued to grow in scope and popularity, attracting 30,000 visitors and helping drive web traffic to member companies’ websites. Direct communications with the membership also increased via the expansion of the distribution list for, and in the frequency of the publication of, the Association’s e-newsletter, The Briefing.

**Media**

The Association bolstered its media outreach on all fronts in 2010: increasing press release distribution, earned media placements, media tours, and speaker engagements. Highlights of these efforts included:

- Successfully pitching a story idea to several media outlets—including Texas’ largest-circulation newspaper—on craft brewers’ increasing preference for packaging their beer in aluminum cans.
- Aluminum Association Chairman Steve Demetriou’s presentation on aluminum and sustainability to the Metals Service Center Institute’s Aluminum Products Division Conference.
- Developing four “media tours”—covering aluminum’s sustainable advantages across its major product markets—that collectively resulted in 55 TV placements and an estimated 80 million TV and radio consumer impressions.

The Association continued to develop further its relationship with the trade media that cover the aluminum industry—attracting reporters, and coverage, from the major metals media at both the Spring and Annual Meetings, held in Washington, D.C. and Chicago, respectively. Staff followed up with visits to the New York-based metals media near year’s end to brief them on issues of importance to the Association.
MEMBERSHIP / MEETINGS

Membership
The Association’s Board of Directors re-upped its commitment to growing the membership by appointing Kevin Kramer—President, Alcoa Growth Initiatives, and a member of the Board’s Executive Committee—as chairman of a new Membership Development Committee tasked with recruiting companies to the Association. In a related action, the Board expanded eligibility for Associate Membership to aluminum service centers and jobbers and revised the dues schedule to better allow for the recruitment of aluminum foundries as Producer Members.

With the assistance of the Associate Member Committee, which helped prospect for new members throughout 2010, at press time total Aluminum Association membership stood at 91 companies.

Meetings
The Association’s biannual meetings provide venues in which members can stay abreast of industry issues that may impact their business, as well as address industry-wide opportunities for increasing aluminum’s usage.

The Spring Meeting, held at the Westin Hotel in Alexandria, Va., centered on the theme of “Succeeding in a Transformed Market.” Speakers from two important product segments—Dave McCurdy, of the Alliance of Automobile Manufacturers, and Maury Zimring, of Coca-Cola Enterprises—gave their views of the changing dynamics within their respective markets.

The Association co-located its Annual Meeting, held in September, with the Aluminum Extruders Council (AEC) at the Hyatt Regency O’Hare in Rosemont, Ill. An effort to expand the networking opportunities available to our members, “Aluminum Week” featured a comprehensive program to apprise professionals in the aluminum and its supplier industries of the latest business and technical issues—as well as highlight aluminum’s role as a leading sustainable material. The Association will again co-locate with AEC for its 2011 Spring Meeting.
The Association’s Standards and Technology programs encompass a wide range of activities that help promote and facilitate the use of aluminum and its alloys—including developing and maintaining industry product standards and nomenclature; developing and publishing documents that help facilitate aluminum’s use in product markets; promoting the development of sound technical practices for the use of aluminum through workshops, seminars, and short courses; and facilitating technical interactions with the government, academic community, and professional societies.

A key technical publication updated in 2010 was the Aluminum Design Manual. The ADM, which is referenced by most U.S. building codes, was updated and reorganized by the Engineering and Design Task Force to facilitate its use by a wider audience.

The majority of the Association’s standards activities are carried out by the Technical Committee on Product Standards. In 2010, the Committee worked on projects covering a broad range of standards activities, including registration of alloys and product standards; modifications to the registration system; ongoing revisions to the Aluminum Standards and Data and Aluminum Standards and Data—Metric publications as well as to both the “Rainbow” and ANSI H35 publications series; maintenance of online international registration records and their addenda; and harmonization of various national and international standards and specifications.

In keeping with its mandate to promote and facilitate the use of aluminum, the Technology Department answered several hundred technical questions from aluminum producers, users, and the general public throughout the year regarding aluminum products and processes. In September, it also co-sponsored, with the American Welding Society, an international seminar/workshop on aluminum welding.
The Sheet & Plate Division supports activities to educate and inform the aluminum producer/distributor/user communities and expand the use of aluminum rolled products. In 2010, these activities included participation in the Metals Service Center Institute’s End Use and Application Seminar and co-sponsorship of the Aluminum Association’s booth at the Metal Construction Association’s (MCA’s) annual Metalcon Exhibition.

The Division sponsored the distribution of over 800 CDs of Aluminum Standards and Data and the Aluminum Design Manual to university professors and students in materials and structural design courses. A number of the Division’s member companies also continued their voluntary support for MCA’s “The Metal Initiative” program to promote the use of metal in the building and construction industry.

The Aluminum Association continues to be the principal source for statistics on the North American aluminum industry, providing timely industry information on key topics, including primary aluminum, mill products, new orders and shipments, shipment of ingot for castings, end-use market estimates, inventories, recycling and secondary recovery, and foreign trade.

Association statistics are derived from external sources as well as our own surveys. With the oversight of the Statistical & Market Research Committee, chaired by Matt Aboud, Managing Director, Hydro Metal Markets North America, as well as product divisions and marketing committees, the department published 31 sepa-
rate reports and publications—weekly, monthly, quarterly, and annually—most based on industry surveys. These reports typically include statistics based on aggregate survey data plus estimated expanded industry totals. Information from industry surveys also forms the basis for statistics published in the Association’s industry fact book, the *Aluminum Statistical Review*.

Through the Statistics Committee and product divisions, our members determine the types of information to be collected, ensuring that the data meet the current needs of the industry—both members and non-members.

**Economic Impact Study**

In early 2009, the Association contracted with Moore Economics to develop a special report on the economic impact of the aluminum industry in the U.S. An initial report covering 2008 was released in April 2009 with a follow-up report on 2009 released to members in late September 2010. In addition to the general report, a more detailed report on a state-by-state basis was also released. This data has been extremely helpful in providing an overview of the industry to members of Congress dealing with industry-related issues such as climate change legislation.

**Mexico**

In June over 120 international attendees to Instituto del Aluminio’s (IMEDAL’s) “2nd International Aluminum Congress and Exhibition,” held in Querétaro, Mexico, heard presentations from Steve Larkin, President of the Aluminum Association; Nick Adams, Aluminum Association Vice President for Business Information and Member Services; and Martin Hartlieb, Manager, Market Development, for Rio Tinto Alcan. Throughout the year, the Aluminum Association continued its cooperative efforts on statistics, health and safety, and other shared interests with our Mexican colleagues. Thanks to the cooperation of IMEDAL, their annual fact book is available in the Association’s online Bookstore, providing members with access to key statistics on Mexico’s aluminum industry.

**China**

The Association continued to exchange information with the China Nonferrous Metals Industry Association and maintain a dialogue with the intent of developing a shared statistical methodology and cooperation on sustainability and environmental issues. The Aluminum Association is also providing monthly Chinese customs data (import and export statistics) on its trade database.
In 2010 the Aluminum Transportation Group (ATG) focused on its expanded mission of advancing aluminum applications across the transport sector, with emphasis on automotive and commercial vehicles. As part of this expanded mission, the Group launched a new website—www.aluminumintransportation.org—integrating passenger and commercial vehicle resources into one easy-to-navigate aluminum resource for the transportation sector.

ATG also continued its work with the other aluminum associations—including the European Aluminium Association (EAA) and the International Aluminium Institute—sharing and distributing each other’s content to multiple audiences. In June, ATG and EAA collaborated to produce a joint news release promoting the University of Aachen study on auto aluminum’s lightweighting advantages, which received coverage in The New York Times Green Blog. The Group also supplied the Alliance of Automobile Manufacturers with aluminum-specific content for its Auto Innovations web portal.

ATG held two popular webinars in 2010—the first a collaborative effort with EAA focusing on two recent studies that position aluminum favorably against competing metals, including steel and magnesium. A second webinar focused on the Ricardo study, detailing aluminum’s lightweighting value in commercial-vehicle applications.

ATG’s media outreach promoting the Ricardo study’s findings helped garner coverage in major commercial-vehicle trade publications, including Fleet Owner and Heavy-Duty Trucking. As a follow-up, the Group has commissioned the American Transportation Research Institute to conduct an analysis of aluminum’s market penetration in the commercial-vehicle sector.
Fuel Economy, Emissions Standards

On the regulatory front, ATG continued to educate policymakers and other third-party influencers, holding briefings with key state and federal staff in Washington, D.C. in advance of the EPA’s proposed revisions to GHG emissions and fuel economy standards for light- and heavy-duty vehicles. ATG also met with key stakeholders at the National Highway Traffic Safety Administration (NHTSA) to educate them on the benefits of lightweighting with aluminum in anticipation of the development of further fuel economy mandates.

ATG reviewed and submitted comments on behalf of the industry for the proposed rulemaking on light-duty vehicles in late October. At press time, the Group was preparing to submit comments on the NHTSA/EPA Notice of Intent regarding reducing GHG emissions and fuel use from heavy-duty trucks and buses for model years 2014-2017.

Other meetings with the EPA and environmental groups were coordinated to discuss aluminum’s energy and environmental benefits in the larger context of vehicle lightweighting, including:

- A technical presentation to EPA in Ann Arbor;
- A meeting with the Sierra Club, Union of Concerned Scientists, and the Safe Climate Campaign, followed by a phone conference with the California Air Resources Board; and
- A briefing with representatives from the White House Council on Environmental Quality and the White House Office of Energy and Climate Change, wherein they acknowledged that vehicle lightweighting is an important factor they will consider as the Administration develops new regulations.
The Can Committee’s activities during the year centered on recycling initiatives, marketing, and the monitoring of state legislative activity.

Cans for Causes
Active promotion of the Association’s Cans for Causes program—which supports organizations in their recycling/fundraising efforts by providing free bins and bin liners—boosted the number of participating “partner” organizations to well over 300 by year’s end. To help publicize the program, the Association launched a media tour touting the program during Earth Week, which resulted in an estimated 22 million TV and radio consumer impressions.

Aluminum Can LCA
In May, the Committee unveiled and launched the aluminum can life-cycle analysis report, which included stakeholder and media outreach. The report, “Life Cycle Impact Assessment of Aluminum Beverage Cans,” received significant exposure in packaging and recycling publications, sustainability blogs, and social networking sites in both North America and Europe. The report itself was downloaded from the Association website approximately 1,000 times in the first six months after its release.

Tracking of Recycling Legislation
Throughout the year, the Committee tracked and monitored state legislation pertaining to recycling, engaging lawmakers where proposed policies would directly affect aluminum. Committee members met with representatives of the Florida Department of Environmental Protection—which has been charged with developing a program to achieve the state’s recycling goal of 75 percent
(across all materials) by 2020—and shared with them the Committee’s views on opportunities for attaining that objective.

**Curbside Value Partnership**

By year’s end, the Can Committee opted to discontinue its funding of the Curbside Value Partnership through Keep American Beautiful. Instead the Committee has established a new tax-exempt 501(c)(3) organization through which it will fund curbside recycling programs that will launch in January 2011.

**Aluminum Can Recycling Rate**

A highlight of the year was the Committee’s announcement in September, in conjunction with the Can Manufacturers Institute and the Institute of Scrap Recycling Industries, that the U.S. aluminum can recycling rate for 2009 had climbed to 57.4 percent—the highest rate in nine years.

**FOIL DIVISION**

The Foil Division in 2010 continued its efforts to educate aluminum packaging students and professionals via both its ongoing foil lecture series and a complete updating of the *Aluminum Foil Manual* CD.

During the fall semester, former Clemson University Professor Dr. Robert Testin gave a series of eight lectures on aluminum foil and its applications at some of the nation’s top packaging schools—including Clemson University, the University of Florida, Michigan State, and the University of Wisconsin-Stout.

The Division also wholly revised the *Aluminum Foil Manual* CD—the bible of the aluminum foil industry. Version 3.0 of the CD—designed for use in aluminum and packaging companies, at packaging schools and technical colleges, and for packaging professionals and anyone who works with aluminum foil—contains an all-new section on sustainability, updated photos, and new illustrations.
The Building & Construction Committee successfully met all major goals set out for its 2010 activities. During the year, the Committee exhibited at both the Metalcon and Greenbuild trade shows. A vehicle to disseminate information on Association research pertaining to aluminum and sustainability, the exhibit highlighted the use-phase benefits of aluminum in sustainable building design. Participation in the trade shows also allowed for the collection of leads from interested construction personnel, from which a database will be pulled together for use after the industry has completed a sustainable building guidance.

Association staff worked closely with U.S. Green Building Council personnel to incorporate updated industry metrics in pertinent life-cycle databases used to calculate environmental impact in the Leadership in Energy and Environmental Design (LEED) process. This same data was forwarded to EPA for its Waste Reduction Model, used to track GHG emission reductions. Staff will continue communicating with stakeholders to ensure the most up-to-date information is used to calculate the impact of aluminum in building and construction applications.

ELECTRICAL DIVISION

The primary purpose of the Electrical Division is to support the proper specification and use of aluminum conductors and metallic sheaths. This is accomplished by codes and standards activities, as well as the development and distribution of technical information. To that end, the Division took steps over the past year to broaden the range of technical and educational materials available to the public.
In the past year, the Division held two meetings. In January, Association representatives on National Electrical Code panels met to discuss voting procedures and review the representatives’ reports on the recommended Association voting positions. In addition, several Division members were nominated as NEC code-making panel representatives for the following term.

In August, Division representatives and the Association representatives on NEC panels initiated the development and expansion of a Division page on the Association website. Now under construction, the page will feature technical and educational materials posted for viewing and free download.

**PIGMENTS & POWDER**

The primary mission of the Pigments & Powder Division is to promote safety and health in plant operations, maintain meaningful product standards, and protect and expand markets for aluminum powder and paste. Working through the Safety and Property Protection Committee, the Division has conducted producer safety workshops in cooperation with the European Aluminium Particulate Association, as well as safety and product research. It maintains a safety publication and video (TR-2) on the proper handling of powder and paste.

Over the last year, the Division continued to provide dust hazard communications to the aluminum industry through its liaison with the National Fire Protection Association and its guidelines on fines and dust (F-1). The Division also continued its monitoring of the activities of governmental organizations, including the Occupational Safety and Health Administration, the Chemical Safety and Hazard Investigation Board, and the Departments of Commerce, Defense, Transportation, State, and Homeland Security.
FINANCES

The 2010 core spending budget was $2.95 million and the overall budgeted spending, including voluntary programs, was set at $6.04 million. Income was slightly higher than budget as a result of an increase in membership and dues. All departments successfully kept their direct spending below budget, but general and administrative costs increased as the salary freeze was lifted and merit increases were awarded. Legal fees exceeded budget, but these costs were offset by savings in health insurance expenditures.

Pre-audited estimated results show an anticipated surplus for 2010 of $250,000, in line with budgeted net income of $253,000. Actual results will vary and may include an adjustment for pension plan reserves once those figures are disclosed in early 2011.

Next year’s budget has been approved at $6.5 million and forecasts an estimated surplus of $156,000.

Budget & Programs
The Aluminum Association expresses its sincere appreciation to the following members, and others, who donated their time and effort to serve on our Committees, Divisions, and Board of Directors (lists current as of year-end 2010).

Aluminum Transportation Group
Randall Scheps (Chairman)
Charles Belbin
Michael E. Belwood
Mark A. Boehman
Michael Bull
Michael P. Donnelly
John F. Fitzpatrick
Mark Fonte
Roark L. Keeler
Jean-Francois Laplante
Kevin G. Lowery
Les Lynch
Kenneth J. Martchek
Pat McNulty
James E. Offer

Romeo Pascasio
Douglas A. Richman
Harry Siegel
Diane Steed
Todd Summe

Associate Member Committee
Marie D. Kistler (Chairman)
Brad Allen
Tom Ballou
Paul Barlow
George A. Bogan
Scott Bournique
Robert A. Brewer
Christer Carlsson
Richard C. Chandler
Jim Checkeye
Dale Chittum

Christopher J. Crosby
Bill Emberson
Michael O. Falk, PE
Andrew R. Fellon
Jon R. Gillespie
Courtney Hagerty
Shaun Hamer
David Hamling
Michael J. Hanley
David N. Hazelett
Rick Hole
Chris Kenney
Niles Kenyon
David Kirby
Jeffrey J. Lawrence
Jack Mahoney
Michael E. McGee
Kevin N. Person

Denis W. Ray
James Robertson
Christopher Romanowski
James D. Rossi
Mike Shay
Patrick Taylor
David Youngblood
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Randy Kissell
George Olive
Gerald Orrison
Frank Shoup
Robert Walton
Ronald D. Ziemian

Extruded Products Division
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Gary M. Stimpson
Richard Thomas
Judith A. Van Houten
Jeffrey S. Van Matre
John W. Vinzant

Executive Committee
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Kevin J. Anton
John Barneson
Thomas A. Brackmann
Eugenio Clariond Rangel
Steven J. Demetriou
Patrick M. Franc
Kevin B. Kramer
Lisa Jane Scheller
Jean Simon
Layle Kip Smith

Finance Committee
William G. Toler (Chairman)
Dietrich M. Gross
John S. Lapides
Kurt Friedrich Leopold
Robert J. Longenecker

Foil Division
J. Coke Williams (Chairman)
Michael F. Finucane
Denis Heroux
Chris Kenney
David Korus
Brian McCallie
Jeff Nodes
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