The past year has been a dynamic one—for both the Aluminum Association and the industry.

The Association welcomed new leadership to its Board of Directors in 2012, with the appointments of Pat Franc, CEO of Tri-Arrows Aluminum, as Chairman and Kip Smith, CEO of Noranda Aluminum, as Vice Chairman. Both industry veterans, they have provided our membership and the industry with sure and steady guidance during the past year—and we look forward to their contributions in the year ahead.

At the federal level, negotiations continued with the Environmental Protection Agency on revisions to both the primary and secondary aluminum MACT standards. In August, the agency finalized fuel efficiency and emissions standards for light-duty vehicles for model years 2017–2025.

Regulatory actions like these can have wide-ranging impacts on how our members conduct their operations and on some of the most important consumer markets for aluminum. For that reason, it is essential that we as an association engage all relevant stakeholders, effectively and vigorously, on issues affecting our business environment.

With this in mind, the Association leadership embarked earlier this year on a strategic review of operations to assess our value proposition to members and determine what, if any, changes will be required to enable the Association to effectively meet the needs of our members going forward. With input from membership surveys and guidance from
the Executive Committee, this review has, and continues to, examine everything from the Association’s vision and mission statements to its strategic goals.

The Association’s strategic objectives going forward are clear. The Association will:

• Strengthen its sustainability position;
• Enhance its value proposition to the membership by deepening and growing the relationship;
• Grow its communications voice; and
• Enhance core programs—Standards, Statistics, Government Affairs, and Environment, Health and Safety.

The strength of this Association, as any other, is dependent on the involvement of its members. As such, enhancing our position in these four areas will require collaborative efforts and the expertise that resides within our member companies. We will look to tap more of our members’ skills and resources to drive the direction of the committees, divisions, and working groups that help shape policy on vital issues facing the industry.

Currently, we are considering proposals from member companies to establish new committees to advance the industry’s position in a number of critical areas. We invite and encourage such proposals.

That said, the Association has already made important strides in the past year to strengthen its performance against the aforementioned core objectives. For example:

• The Sustainability Working Group was elevated to Committee status and named Wise Metals Group EVP/COO Wes Oberholzer as Chairman. The Committee worked in partnership with Resource Canada and automotive producers to formulate a draft product category rule for the use of metals in automobiles and has produced a sustainable green building guidance document for the aluminum industry.
• Aluminum Week, held in conjunction with the Association’s annual meeting, drew its highest attendance ever, with events live-Tweeted to better engage attendees and non-attendees alike.
• The Association’s earned-media activities garnered placements in some of the nation’s most popular news periodicals and programs—including the New York Times, Wall Street Journal, Fox Business, and Investor’s Business Daily. Coverage of the Association’s release of the 2011 UBC recycling rate, as well as its Can Crusade, was expansive.
• The Association reinvigorated its government affairs program and successfully transitioned leadership of its Standards and Technology department.

A detailed account of the Association’s activities and achievements throughout 2012 appears in the pages that follow. We look forward to building on these successes in the year ahead.

To all our members, we wish you a safe, happy, and successful New Year.
Government and International Affairs Subcommittee

In 2012, the Government and International Affairs (GIA) Subcommittee identified the need for increased association government policy leadership in Washington, D.C. To address that need, the Committee began meeting once a month and partnering with other Association committees and divisions through joint meetings with their chairs.

Environmental Support

GIA organized meetings with the Environmental Protection Agency’s (EPA’s) Office of General Counsel on behalf of the Association’s Environmental Committee to deliver industry objections to requirements added to the revision of the secondary MACT rule (hooding requirements for fugitive emissions). Materials developed by the GIA have helped the Committee assess the need and impact of added effort to move the issue.

GIA delivered the Association’s opposition to modeling provisions that EPA attempted to implement for compliance with the National Ambient Air Quality Standards. The Subcommittee conveyed that message through Capitol Hill visits—ultimately meeting with counsel engaged in litigation with EPA on the issue—and will be involved in any activity going forward.

GIA partnered much more actively with the Recycling Roundtable during 2012, assuming a leadership role within the group. As a result, the Association was able to add the industry position to draft recycling legislation and testify in support of it.

The Subcommittee also engaged the services of legislative and regulatory monitoring agencies to develop grassroots organizing capacity deployable on the state and federal levels as needed.

Primary MACT Residual Risk Revision

The Association worked with the Environmental Protection Agency (EPA) closely throughout the year to mitigate the impact of the revised primary aluminum Maximum Achievable Control Technology (MACT) standard. EPA has delayed its primary MACT rule until March 14, 2014 and in the interim will conduct another in-depth analysis. The Association will continue work to finalize the primary aluminum MACT revision, helping to guide testing in a manner that is supportable.
by the industry. An information collection request will be developed and work will be ongoing.

**Secondary MACT Development**

EPA promulgation of the residual risk revision for the secondary aluminum MACT National Emission Standards for Hazardous Air Pollutants (NESHAP) has been delayed for 18 months in order to incorporate further testing for primary facilities. The new finalization deadline for the rule is March 14, 2014. Association staff will continue to work closely with the EPA to ensure that the rule is reasonable and does not inappropriately impact our member aluminum recycling facilities.

**Secondary Aluminum Processing Waste Research Program**

EPA released a draft report from the Cooperative Research and Development Agreement research project for salt cake and other secondary solid wastes to assess soil/landfill disposal reactivity and develop best-management plans for disposal. The draft report was severely compromised by fundamental misunderstandings regarding the nature of salt cake versus dross and other materials.

The Salt Cake Work Group met with the principal researcher in February 2012 to voice stringent objections to many provisions within the draft. EPA staff were broadly receptive to Association comments. Following the meeting, further clarification and documentation was submitted to EPA. The Association is now awaiting a second draft.

Separately, the Association successfully intervened in an Ohio state legislative effort that would have prohibited landfilling of secondary aluminum wastes. The Association and Aleris worked diligently with the bill’s sponsor, State Senator Tim Schaffer, to achieve the final language of SB 294—an omnibus overhaul of Ohio waste management—the original draft of which could have resulted in unnecessary restrictions on waste management for the aluminum industry, with substantial negative economic impact.

**Greenhouse Gas Regulation Under the Clean Air Act**

The Association has filed comments on several issues over the course of EPA’s efforts to regulate greenhouse gases (GHGs) under the Clean Air Act:

- Opposing the EPA’s GHG endangerment finding;
- Opposing the EPA’s “tailoring rule” to set GHG emission regulatory thresholds; and
- Opposing EPA proposals to limit confidential business information protections for GHG reporting requirements.

The Association also filed technical corrections for GHG reporting requirements that were adopted by EPA.
Boiler and Process Heater MACT

The reissued rule contains all of the work practice controls for melter processing units that were successfully included in the previous rule. The rule maintains its 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 pollutant emission limits, only work practice requirements. The Association did, however, submit comments reiterating that EPA should clearly state definitions for both process heaters and boilers.

TSCA Chemical Data Reporting

The Association published an updated guidance document on the new reporting requirements of the Chemical Data Reporting rule (formerly known as the “Inventory Update rule”) of the amended Toxic Substances Control Act (TSCA). All reporting will begin at the same 25,000-lb. threshold for process and use data. The reporting period deadline was August 13, 2012.

SO2 NAAQS

The Association worked in coalition with other industry segments to further litigation against EPA’s modeling approach to SO2 National Ambient Air Quality Standards (NAAQS) compliance. The effort resulted in the agency withdrawing and reconsidering modeling provisions.

Primary Aluminum Division

The Division supported funding efforts to address flame-retardant fabric testing, which was completed in November. Data will be available in 2013.

HEALTH & SAFETY

Casthouse Safety Workshop

The Association conducted a successful Casthouse Safety Workshop in Nashville in November, attracting 135 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 mobile equipment safety and combustible dusts was discussed.

Molten Metal Incident Report

At year’s end, the Association was preparing to issue an updated Molten Metal Incident Report. The report is the product of a voluntary program to share information regarding explosions and near-misses at facilities that melt aluminum. Although not intended to be statistically representative of the entire industry, the report provides useful information for the industry to help guide its safety efforts in molten aluminum environments.

Separately, the Association was due to release an expanded injury and illness report by the close of 2012.
Combustible Dust

Association Health & Safety staff updated industry guidance on combustible dust during the year. The National Fire Protection Association’s Standard for Combustible Metals—NFPA 484—was revised to include information for aluminum recyclers.

PTWI Limit for Aluminum in the Human Diet

Association staff helped successfully achieve reassessment of the World Health Organization’s provisional tolerable weekly intake (PTWI) limit for aluminum in the human diet. Staff also represented the North American aluminum industry at international negotiations to maintain aluminum’s position as a safe and effective packaging material.

SUSTAINABILITY

The former Sustainability Working Group was elevated to committee status in 2012—meaning its activities are funded through core dues rather than via the contributions of its members—with Wise Metals Group EVP/COO Wes Oberholzer appointed as chairman. The Committee guides the production of studies to “develop and manage the array of data and technical information needed to formulate the Association’s sustainability messages and provide technical expertise to the respective committees and divisions in forwarding our sustainability positions.”

This research is designed to develop a complete understanding of the impacts of aluminum production, fabrication, use, and end-of-life treatment.

Aluminum Material Flow Analysis

A material flow analysis designed to measure the industry’s resource preservation performance in North America—with particular focus on documenting historical productions, current in-use stocks, and any overall losses of aluminum—has been substantially completed and is under review. The only remaining outstanding component of the analysis—an in-use stock model using the so-called “bottom-up” approach—will be completed by spring 2013.

Semi-Fabricated Aluminum LCA

Also completed in 2012 was a multi-year project examining the life-cycle environmental footprints of semi-fabricated aluminum products—flat-rolled, extruded,
and shape-casted. The study, which incorporated data survey and life-cycle modeling, has produced a draft report that is under review by technical experts from the aluminum industry. A peer review process will follow before it is published. Data from this report will be available for use in comparative life-cycle assessment (LCA) studies for the transportation, building and construction, and consumer durables markets.

**Aluminum, Energy, and Greenhouse Gas Analysis**

Work has been completed on a draft framework report detailing the relationships among aluminum, energy, and greenhouse gas emissions, based on life-cycle assessment information. The study also compared aluminum with other energy-intensive materials, including steel, copper, plastics, and cement. This is the first such study carried out by the aluminum industry and is designed to help illustrate that use of a material such as aluminum that is energy-intensive to produce in its virgin form can actually help society save considerably more energy by virtue of its use-phase benefits and its recyclability. The report will be released during the second quarter of 2013.

**Environmental Product Declaration**

In August, the Association launched a project to develop Environmental Product Declarations (EPDs) for generic extruded and flat-rolled aluminum products manufactured in North America. EPDs, a “standardized, third-party-verified, and LCA-based label that communicates the environmental performance of a product,” will be used in response to demand from specific market sectors such as building and construction, transportation, and packaging for credible, easy-to-understand, and easy-to-use environmental footprint information. The project is well under way and is scheduled for completion in the first half of 2013. Members who contributed their data to the semifabricated aluminum LCA study can directly use the third-party-verified EPDs to communicate with customers their products’ credentials.

**TRANSPORTATION**

In 2012, the Aluminum Transportation Group (ATG) successfully continued its work to help drive the growth of aluminum usage in the ground transportation market. This was done through the development and sponsorship of research; working with regulatory agencies; and promoting aluminum to the industry, regulators, media, and general public as a strong, lightweight material that can help vehicle manufacturers meet emerging federal fuel and emission standards safely and cost-effectively. Aluminum’s continuing growth in transportation applications gained new currency in 2012 with the launch of a number of high-profile aluminum-intensive vehicles—including the Tesla Model S, which was named car of the year by many leading automotive publications, Range Rover, and the Mercedes SL.

**EPA Fuel Economy/ GHG Standards**

Speaking on behalf of the ATG at a January 17 public forum sponsored by the EPA and NHTSA on the agencies’ proposed greenhouse gas/fuel economy standards
for model year 2017–2025 light-duty vehicles, Doug Richman, Vice President of Engineering at Kaiser Aluminum and ATG Technical Committee Chairman, commented that vehicle downweighting with aluminum offers the “fastest, safest, and most cost-effective way to help meet goals of reduced fuel consumption and reduced greenhouse gas emissions.”

He commended NHTSA for its analysis of the relationships between vehicle design attributes and safety performance, noting that recent NHTSA studies and the agencies’ proposed rule both indicated that downweighting of large and mid-size vehicles will have a “neutral or positive” impact on overall fleet safety while improving fuel efficiency.

In written comments submitted to EPA in February on the proposed standards, ATG endorsed the agency’s size-based approach, saying it “stands as a major milestone for the auto industry, forward-thinking suppliers, and consumers. It is clear, to save energy and reduce emissions, a transition to strong, affordable, and carbon-reducing materials, like aluminum, already is under way. By utilizing these materials, cars and trucks will get lighter—not necessarily smaller—and more fuel efficient.”

That approach was largely reaffirmed in the agencies’ final rule, issued in August, which finally acknowledged that downweighting can be done without detriment to safety—a watershed opinion from NHTSA that ATG has been educating regulatory agencies on for a number of years.

Aluminum Growth in U.S., European Vehicle Markets
Appearing before the 2012 SAE World Congress, ATG Chairman Randall Scheps, Marketing Director – Automotive for Alcoa, reviewed the findings of the most recent Ducker Worldwide North American study—commissioned by the ATG—which projected that aluminum’s market penetration in the construction of new cars, SUVs, pickups and minivans will double over the next decade. “Due to its performance and durability advantages, automotive aluminum already owns the engine and wheel market,” Scheps told the audience. Today, he added, the metal is making aggressive inroads to hoods, trunks, and doors as automakers increasingly pursue holistic downweighting strategies to boost fuel economy and cut emissions.

The following month, at AMM’s 5th Automotive Metals Conference, Scheps noted that a 2012 study published by Ducker Worldwide on the growing use of aluminum in European cars—which almost tripled between 1990 and 2012—is
consistent with trends in the U.S. vehicle market. He said aluminum will continue to displace traditional materials like steel because of its low weight, high strength, and carbon-reducing and recyclable properties.

**AVL Study: Downweighting with Aluminum Necessary to Any Fuel Economy Strategy**

In September, ATG released a study—commissioned from model-based strategic planning consultancy Scenaria Inc., who work with many of the automotive OEMs to develop their fuel-efficiency plans—which concluded that reducing vehicle weight with aluminum is the best overall enabler for significant fuel-efficiency increases.

The study showed no single technology approach will cost-effectively achieve the EPA’s 54.5-miles-per-gallon fuel economy target on its own, but that substituting lower-weight aluminum in automobiles is the one consistent and cost-effective strategy that can be combined with all other efficiency improvement strategies and technologies to maximize their ability to meet the new target. Additionally, substituting lightweight, high-strength materials such as aluminum for steel can avoid less-desirable downsizing of vehicles.

**Earned Media**

Throughout the year, ATG supported its activities with an aggressive media relations and communications program, earning over two dozen placements in print, radio, and online media—including top-tier periodicals *Ward’s Auto*, *Automotive News*, and *Politico*. ATG Chairman Randall Scheps was quoted at length in the *Ward’s Auto* piece, which focused on projected growth in aluminum vehicle applications and how the aluminum industry and automakers are gearing up for that growth. One of several pieces appearing in *Automotive News* during the year outlined specific plans by Alcoa and Novelis to ramp up production in anticipation of a tripling in the usage of aluminum sheet by North American automakers by 2015 for manufacturing closure panels.

During 2012, ATG rebranded its website to DriveAluminum.org, as well as its monthly newsletter and social media (Twitter) communications, which numbered approximately 200 for the year. In the lead-up to Memorial Day Weekend, ATG also assisted in the production of a satellite media tour sponsored by the Aluminum Association that focused on automotive aluminum’s sustainable benefits. The one-day tour, hosted by ESPN racetrack reporter Brienne Pedigo, reached an estimated TV and radio audience of almost 14 million, including the major media markets of Boston, Atlanta, and Chicago.
Green Building Certification Guidance

The Association developed a draft guidance document that can assist in obtaining green building certification for using aluminum products made in North America. The guidance was formulated in response to demand from customers for information that can be used in applying for credits for their products to satisfy criteria and requirements set by green-building rating systems such as Leadership in Energy and Environmental Design (LEED), Green Globes, and the International Green Construction Code. The document contains complete and updated information, with detailed interpretations of what the data mean and how they can and should be used. This is the first such document developed by the aluminum industry. It is now under internal review and is scheduled for release in the spring of 2013, together with the release of the semi-fabricated aluminum LCA report.

Aluminum and Green Building Brochure

In October, the Association developed a brochure for distribution at the 2012 GreenBuild Conference and Exhibition—the North American sustainable building industry’s largest annual trade show. The brochure, titled “Aluminum Builds Sustainable Communities,” documents the life-cycle of aluminum products and their substantial contributions to green building. The pamphlet can be used by member companies in their marketing activities in the building and construction sector.
CAN

2012 was a challenging year for the Can Committee. However, it was able to work with industry partners such as the Can Manufacturers Institute to push for increased recycling of aluminum used beverage cans (UBCs). In August, the 2011 UBC recycling rate was reported at 65.1 percent—its highest level since 1997 and a seven-point rise over the previous year. The higher rate was driven largely by imported UBCs, together with a small increase in consumers recycling materials.

In June, the Association’s EH&S Vice President, Chuck Johnson, testified before the House Subcommittee on Environment and the Economy on the draft bill “The Increasing Manufacturing Competitiveness Through Improved Recycling Act of 2012.” In his testimony, Johnson noted that in 2010 Americans recycled $1.6 billion in aluminum cans. He commended Rep. John Sullivan (R-OK) for offering the bill and for his “continued efforts to increase recycling as a critical piece of U.S. energy and sustainability efforts.”

In 2013 the Can Committee will focus on marketing the aluminum can. “The committee allows us to more efficiently advocate for the can in a way that we can’t as individual members,” said Can Committee Chair Allison Buchanan, Marketing Communications Manager at Alcoa Global Packaging. “2013 is going to be an exciting year as we work to make sure the positive story of the aluminum can is reaching key audiences and the benefits of the can are recognized versus competing packages’ marketing efforts.”
MEDIA/COMMUNICATIONS

The Association waged an assertive communications program in 2012 to educate the media, general public, manufacturers, and other stakeholders of aluminum’s material uses and sustainability benefits across its major product markets. Throughout the year, these efforts successfully engaged audiences in both the traditional and emerging media: television, radio, print, internet, and social media.

Earned Media

The Communications Department’s earned media efforts—including the issuance of press releases, story pitching, and letters to the editor—landed quotes, bylines and reference information sourced to the Association in well over 100 online and print publications. A number of these placements were in some of the nation’s largest-circulation and most esteemed business and general-interest publications, including Investor’s Business Daily (July 20), the Wall Street Journal (September 25), and the New York Times (September 29).

The Association’s August release of the 2011 used beverage can (UBC) recycling rate attracted particularly heavy attention from the trade media—with pick-ups in over three dozen U.S. and overseas publications, blogs, and websites. Packaging World, Packaging Digest, Beverage World, BevNET, Cantech Online, and The Canmaker, among many others, all reported on the jump in the UBC recycling rate to 65.1 percent—its highest level since 1997.

Two media tours formed the core of the Association’s outreach to U.S. television and radio audiences. In April, DIY Network star Jay Baker was enlisted to educate morning television viewers about how sustainable aluminum products can be used to spiff up the home. The “Aluminum in the Home” media tour, which culminated on April 22—Earth Day—reached an estimated audience of 12 million, including the major media markets of Chicago, Dallas, and Miami. ESPN racetrack reporter Brienne Pedigo hosted a second media tour in May timed to dovetail with the run-up to Memorial Day weekend. The one-day satellite tour illuminated an estimated 14 million consumers on aluminum’s usefulness in designing vehicles with better fuel efficiency and lower tailpipe emissions.

The final event of the Can Crusade—a media campaign held during Super
Bowl Week in February—targeted the third major consumer market segment for aluminum: packaging. “Commissioner of Tailgating” Joe Cahn appeared on E! News, Fox television, and sports radio shows in 20 markets—an estimated 3.4 million TV viewers and radio listeners in all—to drive home the message to sports fans that aluminum cans are the “smart” beverage container for tailgating.

Communications staff also worked to promote the industry’s visibility by securing media appearances for the Association’s senior management. Association President Heidi Brock appeared in September on the Fox Business Network to discuss the drivers behind the dramatic growth in aluminum demand through the first half of the year. In October, she was interviewed by MetalMiner on a range of topics—aluminum companies’ response to the potential “fiscal cliff,” aluminum capacity/demand, automotive downweighting—for videos that were posted on the publication’s website as well as on YouTube.

Online/e-Communications
The Association continued to expand its online and social media presence and activities during 2012. In its third year, the Association’s Facebook page now has well over 4,300 followers—easily eclipsing the audiences that follow the pages of competing material trade associations. The page is particularly popular among 18- to 24-year-olds, who comprise one-sixth of its “fans.” It has a weekly reach of ap-
proximately 2,500 people and an effective network approaching 3 million.

The Association’s principal Twitter account—@AluminumNews—gained over a thousand new followers during 2012 and now stands at 3,200. Approximately 50 self-identified journalists follow the account, which—according to Klout—is influential on the topics of sustainability, recycling, beer, policy, metals, and manufacturing. Using Twitter’s hashtag function, the Association “live-Tweeted” both the spring and annual meetings in 2012 to better engage attendees and non-attendees alike. The Association “Tweeted” approximately 1,400 times during the year, with a “Retweet” ranking in the 95th percentile by year’s end.

The Communications Department virtually doubled the frequency with which it distributed its principal member communication—The Briefing e-newsletter—increasing the number of issues in 2012 from 10 to 19 over the previous year. Site traffic to the Association’s website, meanwhile, increased more than 25 percent over 2011.

**MEMBERSHIP/MEETINGS**

Under the leadership of Garney Scott III, President of Scepter Inc., the Association’s Membership Development Committee recruited four new members during the year, bringing the total to 94 member companies—52 Producer Members and 42 Associate Members. Alcan Cable joined as a Producer Member, while Chadwick Engineering, Epcon Industrial Systems, and TRC Environmental Corporation all joined as Associate Members.

**Associate Members**

The Associate Member Committee met twice during the year—at the Association’s spring and annual meetings. Priority items identified for follow-up included the recruitment of additional members, enhancing communications to and among members, and reassessment of the group’s mission and vision statements.

With facilitation of communications between Associate and Producer Members a key issue among Committee members, the group’s get-together at the annual meeting featured a presentation by Denis Wolowiecki, Vice President of Global Procurement for Aleris, who shared best practices in procurement. At the meeting, Kevin Person, CEO of Wagstaff, was acknowledged for his chairmanship of the Committee, and David Youngblood, CEO of Basic Resources, and Drew Fellon, CEO of Fellon-McCord, were elected Chairman and Vice Chairman, respectively.

Throughout 2012, Heidi Brock—in her first full year as Association President—traveled widely to visit member companies, tour their facilities, and meet with executives and staff. Hydro, Alcoa’s In-
talco Works, Scepter Inc., Fellon-McCord, Secat, Eckart, Silberline Manufacturing, Novelis Global Research and Technology Center, Air Products and Chemicals, Smelter Service Corporation, Constellium, Jupiter Aluminum, and Wise Metals Group were among the member companies visited during the year.

Meetings
The 2012 Spring Meeting marked the return of the Association to Napa, Calif. for an exploration of the “New Directions” in which the aluminum industry is heading in the months and years ahead. The meeting’s locale—an hour’s drive north of San Francisco—afforded the opportunity to showcase cutting-edge aluminum packaging in use in the region. Three varietals of FLASQ—a product of nearby St. Helena, Calif.-based JT Wines that is the first domestic wine to be sold in aluminum bottles—were served to guests at the opening reception. Simultaneously, the San Francisco-based Can Van—a mobile canning service for craft breweries—gave demonstrations of its proprietary packaging technique.

At the meeting, keynote speaker Stephen Hadley, national security advisor to President George W. Bush, addressed the need for the U.S. to lead in the international arena as, in his view, it is the only nation with the military and economic power to do so. China—a potential rival for this role—is preoccupied with creating the 25 million jobs per year necessary to accommodate its growing labor force, he said.

For the third year running, the Association joined forces with the Aluminum Extruders Council for its annual meeting, held in Chicago—permitting members greater exposure to educational and networking opportunities. The larger audience also afforded a more expansive audience for members to educate potential customers on their available products—whether through the Aluminum Marketplace, Member Minute presentations, or sponsorship of meeting events.

With the EPA/NHTSA’s newly enhanced fuel-efficiency and emission standards, and a resurgent North American auto industry, as backdrop, the meeting examined “The Road Ahead.” That road is a bright one for aluminum in transportation applications, said keynote

ATG Chairman Randall Scheps, Alliance of Automobile Manufacturers President & CEO Mitch Bainwol, Aluminum Association President Heidi Brock, and NHTSA Administrator David Strickland at Aluminum Week 2012 (left). Kip Smith, the Association’s new Vice Chairman (above).
speaker Jack Hockema, President, CEO, and Chairman of Kaiser Aluminum who, citing a 2011 Ducker Worldwide report, predicted aluminum flat rolled content would grow five-fold by 2025. Picking up on Hockema’s theme, Dick Schultz, Managing Director for Automotive Materials Practice at Ducker, forecast a doubling of aluminum’s share of the materials mix in North American vehicles by 2025.

NHTSA Administrator David Strickland gave audience members a deeper insight into not only the Administration’s program to increase fuel-efficiency and emissions standards in vehicles over the next decade, but of the economic benefits that could accrue to the U.S. economy as a result. Mitch Bainwol, CEO of the Alliance of Automobile Manufacturers, applauded efforts to encourage higher fuel and emissions standards and commended the agencies for their inclusion in the final rule of a midterm evaluation allowing for a comprehensive review of the standards’ effectiveness to make any adjustments deemed to be required at that time.

The meeting, which boasted the highest-ever Aluminum Week attendance, was live-Tweeted throughout for the benefit of those not present.

The meeting featured the re-election of four members of the Board of Directors: Jean Simon, President and CEO, Primary Metals, of Rio Tinto Alcan; Thomas Wapolle, President of Novelis North America; Patrick Taylor, President and CEO, BestTransport; and David Youngblood, President and CEO, Basic Resources. Additionally, Tony Farraj, Commercial Vice President for Global Can Sheet at Alcoa; Wes Oberholzer, EVP/COO of Wise Metals Group; Patrick Lawlor, President of Sapa Extrusions Inc.; and Garney Scott III, CEO of Specter Inc., were appointed to the Association’s Executive Committee.

STANDARDS AND TECHNOLOGY

The Association’s Standards and Technology group took on new leadership during the year when John Weritz, formerly Metallurgy Manager at Wise Alloys, was named to replace the retiring Mike Skillingberg.

Standards and Technology programs comprise a wide range of activities that promote and facilitate the use of aluminum and its alloys—including developing and maintaining industry product stan-
ards and nomenclature; publishing documents that help facilitate aluminum’s use in product markets; promoting sound technical practices in the use of aluminum through workshops, seminars, and short courses; and facilitating technical interactions among the government, professional societies, and the academic community.

In 2012, Standards and Technology oversaw the updating of Standard Test Procedure for Aluminum Alloy Grain Refiners, popularly known as TP-1. The test procedure described in the publication is used to determine the ability of grain refiners to reduce grain size during solidification of aluminum alloys under standardized conditions—and for examining the structure of the grain refiner for uniformity.

The majority of the Association’s standards activities are carried out by the Technical Committee on Product Standards (TCPS). In 2012, 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 series of publications; maintenance of online international registration records and their addenda; and harmonization of various national and international standards and specifications. In addition, Department staff participated at standards meetings of ASTM International, the American Society of Mechanical Engineers, the International Organization for Standardization, and the European Aluminium Association to promote the application of standards developed by TCPS and the global harmonization of aluminum standards.

In keeping with its mandate to promote the use of aluminum and its alloys, Standards and Technology Department staff answered hundreds of technical questions from aluminum producers, users, and the general public throughout the year regarding aluminum products and processes. In September, it also participated in the American Welding Society international seminar/workshop on aluminum welding.

**SHEET AND PLATE**

The Sheet and Plate Division supports activities that help educate aluminum producers, distributors, and end users and broaden the use of aluminum rolled products. In 2012, 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 annual Metalcon
International Conference and Exhibition. Division members also participated in the Association’s marketing committees, including the Can Committee, the Aluminum Transportation Group, and the Building and Construction Committee.

To help promote knowledge of aluminum products and their capabilities, the Division again distributed CDs of Aluminum Standards and Data and the Aluminum Design Manual to universities and their students in materials and structural design courses.

STATISTICS
The 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.

Statistics are drawn from external sources as well as the Association’s own surveys. With oversight from the Statistical and Market Research Committee, as well as product divisions and marketing committees, the Association published 31 separate reports and publications in 2012—including weekly, monthly, quarterly, and annual titles.

Two significant titles updated in 2012 were the North America Aluminum Industry Plant Directory and the North America Aluminum Industry Extrusion Press Directory.

CASTING AND RECYCLING
The Casting and Recycling Division held two meetings during 2012, with discussions focused on the activities of the Salt Cake Work Group and various environmental issues affecting the industry. Presentations to the Division included Bob McHale, Vice President, Metal Purchases, at Alcoa Materials Management, who spoke about the inflationary aspect of commercial metals purchased by aluminum companies for use as alloying elements; Drew Fellon, CEO of Fellon-McCord, who outlined trends in the natural gas market and supply and demand in the global environment; and David Youngblood, CEO of Basic Resources, who presented on the use of flux in the secondary aluminum industry and foundry operations.

PIGMENTS AND POWDER
The Pigments and Powder Division promotes safety and health in plant operations, maintains product standards, and works to protect and expand markets for aluminum powder and paste. Working through the Safety and Property Protection Committee, the Division conducts producer safety workshops in cooperation with the European Aluminium Particulate Association as well as safety and
product research. It also maintains a safety publication and video, *Recommendations for Storage and Handling of Aluminum Powders and Paste (TR-2).*

In 2012, the Division submitted comments on a notice in the *Federal Register* that proposed to move aluminum spherical powder from the U.S. Munitions List to the Commerce Control List, shifting export controls on spherical powder from the Department of State to the Department of Commerce. The Division supported the measure.

The Division also conducted a safety workshop in Chicago in May. The program included incident reports, best practices, environmental and health updates, and presentations by safety consultants. Delegates from the U.S., Austria, Belgium, France, Germany, Japan, Poland, Romania, Sweden, and the U.K. participated.

**ELECTRICAL**

The Electrical Division supports the sale and proper use of aluminum conductors and metallic sheaths. It accomplishes this via the publication of educational materials, participation in the National Joint Apprenticeship and Training Committee’s National Training Institute, and involvement in the development of the National Electrical Code.

During the year, the Division supported the National Electrical Contractors Association in revising the NECA/AA 104-2012 Standard for Installing Aluminum Building Wire and Cable—establishing the minimum baseline of quality and workmanship for installing electrical products and systems. It also exhibited at the National Training Institute’s annual exhibition—one of the premier electrical trade shows in the construction industry.

**LEGAL AUDIT**

The Legal Audit Committee, under the leadership of Chairman John Donnan, Executive Vice President, Legal, at Kaiser Aluminum, oversees the Association’s compliance with all applicable laws and its involvement in legal issues of various types. Issues that came before the Committee in 2012 included the Association’s conformance with its antitrust compliance policy, the staff’s antitrust compliance training program, discovery requests to the Association in litigation involving members, and protection of the Association’s intellectual property.
The Association’s 2012 core spending budget was $4.252 million and the overall budgeted spend, including voluntary programs, was set at $6.83 million with revenue and expenses reported to break even. During the year, changes within the voluntary programs resulted in a significant decrease in cross charges. Cross charges from the divisions and committees are used to support general and administrative expenses, and in 2012 they dropped from a budgeted $700,000 to $530,000.

Additionally, there was an overspend from the spring meeting and a decrease of approximately $50,000 in budgeted publication sales. To address this growing deficit, the Association found it necessary to reduce staff in July. Three full-time employees were released and their duties redistributed to the remaining staff plus one new hire. Further savings were made by cutting costs in direct core programs and moving several planned projects to 2013. Consequently, the revised forecast for 2012 reflects an anticipated surplus of approximately $150,000.

The approved 2013 budget includes $4.35 million in core spending and a total budget, including voluntary divisions and committees, of just under $6 million.
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 2012).

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