What an amazing year to work in aluminum. With the leadership and support of our membership, the Aluminum Association tackled a number of big challenges, chalked up some major wins and set the table for an even better 2018.

Consider just a small sample of what we accomplished together during the past 12 months: Aluminum is now near the very top of the president’s trade agenda — and the industry participated in an event in the Oval Office broadcast live across the country. We released our semi-annual survey of automakers by Ducker Worldwide showing that aluminum is entering an unprecedented phase of growth in the automotive market as OEMs move to a multi-material future.

We saw domestic aluminum demand grow for the eighth straight year as shipments approach record-setting levels from the mid-2000s. Several new U.S. aluminum facilities opened and continued investments were announced. Over the course of a few months this spring and summer, the industry was featured prominently in top tier media including The New York Times, The Washington Post, The Economist, The Wall Street Journal, Marketplace, CNN and elsewhere.

Despite all these positive indicators, challenges loom on the horizon. Aluminum imports into the United States have grown for the past six years and are at record levels today. Chinese overcapacity continues to threaten long-term market stability.

To begin to address these challenges, the Commerce Department released positive preliminary determinations in the antidumping and countervailing duty cases combatting Chinese aluminum foil, and later in the year, self-initiated a case on common alloy aluminum sheet coming from China.

The aluminum supply issue, which has to date impacted primary aluminum producers most severely, is increasingly hurting producers and fabricators further down the value chain.

In these pages, you’ll learn how the aluminum producers, recyclers, fabricators and suppliers came together in 2017 to tackle the shared priorities of the industry.

We stand at a pivotal inflection point for American manufacturing in general and aluminum in particular. We face some headwinds, to be sure, but we also have some incredible opportunities to strengthen the domestic industry for years to come. Now is the time to capitalize on this unique moment and secure aluminum’s bright future.

Sincerely,

Michelle O’Neill
Senior Vice President, Global Government Affairs & Sustainability, Alcoa and Aluminum Association Chair

Heidi Brock
President & CEO, The Aluminum Association
The Aluminum Association promotes the production and use of aluminum as the sustainable material of choice.

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.

Approved by the Board of Directors, April 2013

BY THE NUMBERS

713,000 jobs supported by U.S. aluminum industry
$2.3B invested or committed for U.S. plant expansions since 2013
395 aluminum plants in the United States
40 states with aluminum plant presence
541 alloys registered by the Aluminum Association since 1954
198 industry employees trained on safety in 2016
$41,000+ raised in 2017 by AluminumPAC

115 member companies
$13.2M saved for the industry in 2016 through regulatory engagement
34 ongoing statistical reports
202 association meeting registrations
900,000+ page views on www.aluminum.org
21,000+ followers across social media channels
48 members of the Congressional Aluminum Caucus
The aluminum industry’s profile in Washington — and advocacy engagement with regulators, legislators and top administration officials — has rarely been higher. The industry’s issues are top-of-mind from the White House on down. This year, the Aluminum Association helped put members in front of President Trump, Commerce Secretary Wilbur Ross, the International Trade Commission, key legislators on Capitol Hill, administration political staff and top regulators. Meanwhile, the Aluminum Association’s Political Action Committee, AluminumPAC, continued to grow and have an impact. The aluminum industry has an incredible story to tell — one of growth, opportunity and modern manufacturing innovation. With the help of our membership, we are telling this story to top policymakers like never before.
In April, President Trump invited the aluminum industry — including representatives of the Aluminum Association and the Congressional Aluminum Caucus — to the Oval Office for a signing ceremony launching a Section 232 investigation exploring the national security implications of imported aluminum. The event offered tremendous public exposure for the industry and was broadcast live on several national cable news networks. The Aluminum Association applauded the investigation and the president’s commitment to a vibrant and healthy aluminum industry. We made the case that any final outcome of the 232 investigation should focus on the challenges associated with Chinese aluminum overcapacity.

The path forward is not about creating artificial barriers but about building an industry poised for sustainable success.”

ASSOCIATION HIGHLIGHTS CHINESE OVERCAPACITY AT COMMERCE DEPARTMENT HEARING

Following the president’s initiation of a Section 232 investigation into imported aluminum, the industry came together to testify in front of the Department of Commerce this June. Twelve member company and association representatives testified along with numerous other stakeholders during a full day public hearing. The industry’s position was clear and consistent — the investigation must keep the focus on Chinese overcapacity as the key challenge impacting domestic producers today and should address the full aluminum value chain. Other global trading partners follow the rules and those partners should not be penalized for the actions of others — needlessly disrupting long-established supply chains. The industry welcomes global competition and trade, but insists that this trade be free, fair and rules-based.
ALUMINUM TRANSPORTATION GROUP CALLS FOR REGULATORY CERTAINTY

As the new administration reopened the midterm review of vehicle fuel economy standards, the Aluminum Transportation Group (ATG), the association’s automotive market committee, sprang into action to ensure that its voice is heard as part of the debate. The growing use of automotive aluminum driven by demand for more fuel-efficient vehicles has spurred significant investment in domestic manufacturing in recent years and two straight years of record shipments. Following official comments submitted in the summer — and testimony in front of the Environmental Protection Agency (EPA) — the industry met with key stakeholders at the White House, National Highway Transportation Safety Administration (NHTSA), the California Air Resources Board and on Capitol Hill. Among other priorities, the ATG is calling for regulatory certainty in the process to support continued capital investment.

The association’s Aluminum Transportation Group highlighted the jobs, consumer and environmental impacts of increased aluminum use in cars and trucks with key policymakers.
The aluminum industry directly employs 161,000 workers and indirectly employs an additional 551,000 workers, representing jobs in every state and the District of Columbia.

Aluminum companies need predictability and consistency in the regulatory conditions under which they operate to support continued investment in the United States.”

GANESH PANNEER, CHAIR, THE ALUMINUM TRANSPORTATION GROUP

REGULATORY ENGAGEMENT SAVES MILLIONS FOR INDUSTRY

The Aluminum Association works closely with members to engage with regulators on developing solutions to environmental regulatory challenges. In 2016, the association estimated that it saved the industry more than $13 million in unnecessary compliance costs through regulatory engagement. This past year, the association successfully defended existing rotary furnace air emissions testing protocols, preventing additional unrepresentative testing from being required. The association also provided significant input and support to the EPA on revisions to the aluminum water quality standards and that engagement will continue into 2018 as the standards are finalized. Additional key concerns targeted by the association this year included regulatory implementation of the new Toxic Substances Control Act (TSCA) legislation, greenhouse gas permitting requirements at manufacturing facilities, and the jurisdictional Waters of the United States (WOTUS) rule. Reflective of the new presidential administration, the association provided input from an aluminum industry perspective to both the Department of Commerce and the EPA on opportunities to grow domestic manufacturing and streamline regulatory burdens. Ongoing regulatory engagement seeks to preserve the industry’s overall environmental ‘license to operate’ and provides cost savings and avoidance opportunities in specific regulatory program areas.
USITC CITES CHINA IN SECTION 332 REPORT

In the spring of 2016, the House Ways & Means Committee requested that the U.S. International Trade Commission (USITC) produce a report under Section 332 of the Tariff Act of 1930 to better understand the competitive conditions of the domestic aluminum industry in the global economy. The Aluminum Association advocated for the report with the help of the Congressional Aluminum Caucus as a part of a broader effort to support action on Chinese overcapacity. Following more than a year of study, including input from member companies and a broad spectrum of industry stakeholders, the USITC released its report in July. The final report supported industry arguments noting that oversupply is harming global aluminum producers and that China’s capacity growth has far exceeded all other countries. The 332 report lends added credibility to our call for a negotiated, government-to-government agreement to curb Chinese overcapacity as the best solution to address this dynamic in the global aluminum market.

COMMERCE DEPARTMENT SELF-INITIATES CASE ON COMMON ALLOY ALUMINUM

In late November, the U.S. Department of Commerce announced a self-initiated antidumping and countervailing duty investigation into imports of common alloy sheet from the People’s Republic of China. Common alloy aluminum sheet is used in everything from gutters and downspouts to street signs to electrical boxes. This was the first such action the U.S. government has self-initiated in more than 25 years and reflects an understanding of the acute challenges around Chinese aluminum overcapacity. The Aluminum Association applauded the decision and association President & CEO Heidi Brock participated in a press event with Commerce Secretary Wilbur Ross announcing the move. In December, the industry participated in an all-day hearing in front of the U.S. International Trade Commission highlighting its support for the case.
The volume of aluminum imports and decrease in U.S. aluminum capacity makes it clear that global aluminum overcapacity has an impact on our economy.”

WILBUR ROSS, SECRETARY, DEPARTMENT OF COMMERCE

Nearly a dozen association member companies highlighted the challenge of Chinese metal overcapacity at a Department of Commerce hearing on that agency’s Section 232 investigation in June.
As the world continues to move toward a more sustainable future, aluminum is growing a key solution for innovative manufacturers looking to reduce their carbon footprint. As a key source of data and information — on statistics, standards and environmental impact — the Aluminum Association plays a key role in encouraging the adoption of aluminum in the marketplace. The association promotes aluminum as the sustainable material of choice to key stakeholders through research and reporting while the industry continues to modernize and advance its technology. In 2017, the association commissioned a variety of reports and publications essential to the future of the industry.

2017 DUCKER STUDY SHOWS UNPRECEDENTED ALUMINUM GROWTH

Since 1996, the association’s Aluminum Transportation Group (ATG) has worked with market research firm Ducker Worldwide to conduct a triennial survey on the material usage of automakers. This year’s study, “Aluminum Content in North American Light Vehicles 2016 to 2028,” shows an unprecedented growth trajectory for aluminum — projecting that the total aluminum content in an average car or truck sold in North America will grow from 397 pounds per vehicle (PPV) in 2015 to 565 PPV by 2028, representing 16 percent of total vehicle weight. The data reaffirms continued market share growth for aluminum into high-volume vehicles as well as the aluminum advantage. The report is one of the top downloads on the ATG’s website www.drivealuminum.org.
During Greenbuild 2017 in Boston this November, the Aluminum Association released an updated version of Aluminum in Green Buildings — A Guide to Environmental Declarations. The Guidelines reflect the latest development of environmental declaration requirements in major green building codes and rating systems, including:

- LEED v4
- Green Globes 2013
- IgCC 2012
- CALGreen 2010/2012.

This updated guide provides those in the building and construction industry further information crucial to producing meaningful declarations on aluminum building products.
The association released infographics highlighting the advantages of aluminum use in various sectors of the transportation market.
During its annual meeting in Washington, D.C., the association released a new infographic highlighting how its associate members provide value throughout the production process.
President Donald J. Trump signs an executive order kicking off a Section 232 investigation exploring the national security implications of imported aluminum in April.

Association President & CEO Heidi Brock meets with Environmental Protection Agency (EPA) Administrator Scott Pruitt in March.

In May, the Aluminum Association’s Executive Committee Trade Working Group spent a day in Washington for a series of meetings including with Commerce Secretary Wilbur Ross (center).

Mark Eliopulos (right), Corporate Director of Health & Safety for Kaiser Aluminum, accepts the association’s Marlan T. Boultinghouse Award for service to the North American aluminum industry.
The Aluminum Association’s Technical Committee on Product Standards meets at association headquarters to discuss priorities for 2018.

The Aluminum Transportation Group meets for a strategic planning session in Novi, MI this June.

The Aluminum Association’s Political Action Committee hosted Senator Todd Young (R-IN) during its annual meeting in Washington, D.C.

During an interview with CNN’s Richard Quest, association President & CEO Heidi Brock highlighted how aluminum foil producers are leveling the playing field with China.

The Aluminum Association’s membership celebrates its legislator of the year Suzan DelBene (D-WA) (center) at a Capitol Visitor’s Center reception during its annual meeting in Washington, D.C. this October.

The Aluminum Association’s Political Action Committee hosted Senator Todd Young (R-IN) during its annual meeting in Washington, D.C.

The Aluminum Transportation Group meets for a strategic planning session in Novi, MI this June.
Not all the excitement for the aluminum industry this year was in Washington. The Aluminum Association worked with members to spread the industry’s message far and wide in support of the more than 700,000 total jobs and $186 billion in economic impact aluminum drives nationwide. The industry’s story was featured widely in local and national media; the association’s Trade Enforcement Working Group notched a big win for aluminum foil producers; the Aluminum USA trade show brought more than 1,500 industry stakeholders to Nashville; and much more. 2017 also saw new announcements and openings for aluminum production facilities around the country. The Aluminum Association is proud to work with its membership to tell the story of how “Aluminum Moves America!”

The association attended a groundbreaking and grand opening ceremony for a new $400 million aluminum facility at Logan Aluminum in Russellville, KY, and also attended a grand opening for a new Aleris facility (pictured below) in Lewisport, KY.
With a number of high profile activities that put the aluminum industry in the middle of the national debate on global trade, the Aluminum Association capitalized on the increased attention and ensured major exposure for the aluminum industry and its issues. During a 6-month span throughout this spring and summer, the aluminum industry was featured in an incredible array of media — with front-page stories in *The Washington Post* and *The New York Times*; a feature in *The Economist* magazine; on CNN television and Marketplace on radio — to name just a few. Beyond national media, the industry was also featured in local news stories in cities ranging from Pittsburgh, PA, to Davenport, IA, to Cleveland, OH, to Nashville, TN.
A BIG WIN FOR U.S. FOIL PRODUCERS

A series of decisions from the Commerce Department put the aluminum foil market back on track in the U.S. this year. In March, the Aluminum Association’s Trade Enforcement Working Group filed its first-ever antidumping countervailing duty investigation into subsidized imports of Chinese aluminum foil being dumped on the U.S. market. While final determinations will be made in 2018, the preliminary decisions have applied significant duties on foil imported from China and has put the domestic foil industry back on a level playing field. This fall, one domestic foil producer even announced a $110 million expansion in Huntingdon, TN, creating more than 100 domestic manufacturing jobs.

ALUMINUM WEEK KEEPS INDUSTRY INFORMED

With the increased level of activity in Washington surrounding the incoming Trump administration, the Aluminum Association introduced a new weekly e-newsletter in 2017 — Aluminum Week. Delivered each Friday morning to nearly 3,000 inboxes of members and other industry stakeholders, Aluminum Week is modeled after other popular news and policy emails like POLITICO Playbook Axios AM and The Skimm. The style is breezy and readable with multiple links, references, data and calls to action to encourage active engagement. The newsletter led to increased subscribers, open rates, clicks and forwards compared to our previously bi-monthly email, the Modern Metal Brief. Aluminum Week won a 2017 PRNews Digital Award for “Best Email Newsletter,” beating out stiff competition from The New York Knicks, CBS Radio and others.
Safety remains a fundamental tenet of a sustainable aluminum industry—as indispensable to the industry as the metal itself is to modern life.”

MICHELLE O’NEILL, CHAIR, THE ALUMINUM ASSOCIATION

INDUSTRY RECORDS SAFEST YEAR EVER

A recent government report shows that 2016 was the safest year ever for the U.S. aluminum industry, reflecting that both Total Recordable Incident (TRI) cases and Days Away from Work, Restricted, or Transferred (DART) cases have declined more than 51 percent in the industry since 2003. Of course any safety incident is one too many and the association this year provided industry leadership toward an even safer industry by tracking and reporting on molten metal safety incidents, training nearly 200 industry professionals at two interactive Casthouse Safety Workshops and developing an online molten metal safety training module for use in introducing molten metal safety concepts. In addition, the association sponsored a molten metal fabric testing program in cooperation with member companies and made the testing data available to the broader industry.

ALUMINUM USA TRADE SHOW BRINGS INDUSTRY TO NASHVILLE

The Aluminum Association was a presenting partner of the second edition of the Aluminum USA trade show in Nashville, TN this October with Reed Exhibitions. The show brought together more than 1,500 aluminum industry producers, suppliers and other stakeholders for two days of networking, educational seminars and business development opportunities. Total attendance was up 13 percent for the 2017 show and exhibiting companies were up 21 percent. Nashville proved to be such a successful location that we’ve already booked the Music City Center for the next iteration of Aluminum USA — mark your calendars now for September 12-13, 2019!

The Aluminum Association trained nearly 200 industry employees on the latest safety best practices during two separate Casthouse Safety Workshops this year.

The Aluminum USA trade show beat records bringing more than 1,500 industry stakeholders to the Music City Center in Nashville, TN in October.
2017 A RECORD YEAR FOR ALUMINUM ASSOCIATION MEETING ATTENDANCE

We would like to thank those who generously contributed to the Aluminum PAC in 2017. Their financial support will greatly help us advance the interests of the domestic aluminum industry.

**THE CHAIR’S CLUB**  
(Max $5,000)  
Garney Scott, Scepter  
Heidi Brock, Aluminum Association  
Erin Fauber, AMCOR  
Lisa Scheller, Silberline Manufacturing Company

**PRESIDENTIAL SUITE**  
($2,500 – $4,999)  
Michelle O’Neill, Alcoa  
Tim Reyes, Alcoa  
Alcoa PAC

**CONGRESSIONAL SUITE**  
($1,000 – $2,499)  
Air Products Political Alliance  
Subodh Das, Phinix, LLC  
Charles Johnson, Aluminum Association (former)  
Joe Quinn, Aluminum Association  
Sean Stack, Aleris, Inc.  
Buddy Stemple, Constellium  
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Matt Meenan, Aluminum Association  
Lee Simowitz, Baker & Hostetler  
John Wharton, Gresham Smith & Partners  
John Weritz, Aluminum Association
LEADERSHIP

The Aluminum Association expresses its sincere appreciation to all members who served in leadership roles with Association Committees, Divisions and the Board of Directors in 2017.

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