



The  
**Aluminum**  
Association



2017 ANNUAL REPORT



## CHAIR & PRESIDENT'S MESSAGE

# THE VOICE OF THE ALUMINUM VALUE CHAIN

**W**hat 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*

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



*Heidi Brock*

**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 **RECORD YEAR**

**900,000+** page views on www.aluminum.org **↑ 8%**

**21,000+** followers across social media channels **↑ 11%**

**48** members of the Congressional Aluminum Caucus

# ALUMINUM IN WASHINGTON



The Aluminum Association's Aluminum Transportation Group engaged with D.C. policymakers on the midterm review of vehicle fuel economy.

**T**he 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.



RODNEY CHOICE PHOTOGRAPHY

## ALUMINUM AT THE WHITE HOUSE

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.



Left to Right: Rep. Jackie Walworski [R-IN] Caucus member; Rep. Jason Smith [R-MO] Caucus member; Commerce Secretary Wilbur Ross; Mr and Mrs Hudock from Alumisource; Michael Bless, Century; Garney Scott, Scetper; Margaret Cosentino, Arconic; Lee McCarter, JW Aluminum; Heidi Brock, Aluminum Association; Rep. Mike Kelly [R-PA] Caucus member; Rep. Larry Buschon [R-IN] Caucus co-chair; Michelle O'Neill, Alcoa; and Roy Harvey, Alcoa.



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

GARNEY SCOTT, IMMEDIATE PAST CHAIR, THE ALUMINUM ASSOCIATION

## 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.

## ALUMINUM DRIVES AMERICA

The U.S. aluminum industry is a major part of the modern manufacturing economy, driving jobs, investment and innovation while supporting energy independence.

JOBS



**713,000**

total jobs in the aluminum industry today



**1,500**

new permanent American manufacturing jobs since 2013

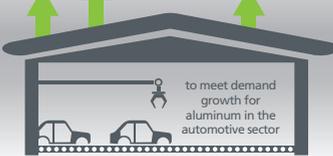


**+3,000**

Net American manufacturing jobs by 2025

INVESTMENT

**\$2B+ INVESTMENT**  
SINCE 2013



to meet demand growth for aluminum in the automotive sector

INDEPENDENCE



From 2015 through 2030, increased use of aluminum will lead to a total energy savings equivalent to 208 million barrels of oil

INNOVATION



**MICROMILL™**  
Fastest aluminum casting and rolling system in the world  
40% more formable  
30% stronger

### 530 REGISTERED ALLOYS

RC5754 alloy contains up to 75 percent recycled content, designed in collaboration with Jaguar Land Rover

7000-series aluminum alloy - two to three times stronger than conventional aluminum alloys; exceeds the weight saving potential of high-strength steels



### CLOSED LOOP RECYCLING

Ford's recycling system recovers enough military-grade aluminum alloy more than 37,000 F-Series truck bodies a month

## AMERICA DRIVES ALUMINUM

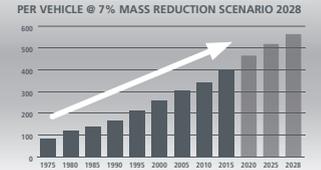
North American vehicles have more aluminum content than ever before. In 2015, 5.7 billion pounds of metal shipped to the passenger car and light truck market—the biggest year in history for aluminum shipments.

SAFETY • PERFORMANCE • EFFICIENCY • DURABILITY



Every aluminum-bodied car or truck ever crash tested by U.S. federal regulators earned a perfect 5-star safety rating

N.A. LIGHT VEHICLE ALUMINUM CONTENT NET POUNDS PER VEHICLE @ 7% MASS REDUCTION SCENARIO 2028



### MASS REDUCTION SCENARIOS



In all mass reduction scenarios, aluminum content in light duty vehicles is projected to rise continuously through 2028, fueling jobs and investments nationwide



### The Aluminum Industry Supports

Regulatory certainty | One National Program | Unchanged 2021 GHG standards | Direction on 2026-2030



The association's Aluminum Transportation Group highlighted the jobs, consumer and environmental impacts of increased aluminum use in cars and trucks with key policymakers.

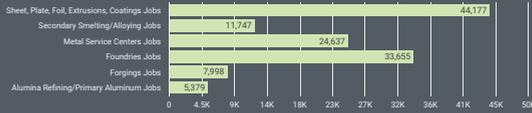
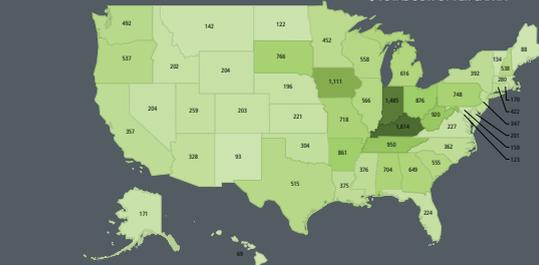
## ALUMINUM DRIVES AMERICAN JOBS

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.

### TOTAL JOBS



### \$ TOTAL OUTPUT PER CAPITA



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

STATE	ALUMINUM JOBS	\$ OUTPUT PER CAPITA	COMPANY FACILITIES	STATE	ALUMINUM JOBS	\$ OUTPUT PER CAPITA	COMPANY FACILITIES
AK	29	171	1	MT	28	142	0
AL	3,121	704	37	NC	2,915	362	22
AR	2,153	861	18	ND	30	122	0
AZ	1,489	328	18	NE	348	196	7
CA	10,750	357	176	NH	954	588	14
CO	691	203	16	NJ	2,492	347	30
CT	1,324	422	20	NM	79	93	1
DC	2	123	0	NV	273	204	3
DE	34	201	1	NY	4,617	392	46
FL	2,406	224	51	OH	9,565	876	144
GA	3,570	649	32	OK	1,302	304	14
HI	49	69	0	OR	1,571	537	20
IA	1,469	1,111	24	PA	8,914	748	95
ID	164	202	3	RI	154	170	4
IL	8,611	566	92	SC	2,490	555	24
IN	5,105	1,485	85	SD	610	766	2
KS	856	221	13	TN	5,411	950	37
KY	5,200	1,614	38	TX	10,303	515	87
LA	1,872	375	7	UT	854	259	7
MA	1,200	280	33	VA	1,484	227	15
MD	879	159	17	VT	27	134	1
ME	34	88	0	WA	2,330	492	27
MI	6,222	616	117	WI	3,303	558	57
MN	3,742	452	37	WV	690	920	8
MO	4,060	718	39	WY	49	204	0
MS	1,768	376	11				

## 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 Tarrif 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.



### What is Common Alloy?

The U.S. Department of Commerce recently announced a self-initiated AD/CVD case investigating imports of common alloy aluminum sheet from China. This is the U.S. government's first such action in more than 25 years and reflects an understanding of the challenges created by Chinese aluminum overcapacity. But, what is common alloy?

Common alloy is a flat-rolled aluminum product used in countless consumer and industrial applications. It is typically made from a 1XXX, 3XXX, or 5XXX series-alloy and ranges in thickness from less than 1 mm to more than 6 mm. Excluded from the scope of the investigation is aluminum can and auto body aluminum stock.

The Aluminum Association logo is in the bottom right corner.



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.

RODNEY CHOICE PHOTOGRAPHY

**Heidi Brock**  
@HeidiBiggsBrock Following

Always great to take @AluminumNews members to the hill & talk how #ALmovesUS w/@SenCapito @Constellium @Novelis@arconic

5:22 PM - 3 Oct 2017

**Aluminum Association**  
@AluminumNews

Yesterday @WhiteHouse with @POTUS for executive memo signing to help US #aluminum industry continue to grow! cc: @HeidiBiggsBrock

3:05 AM - 28 Apr 2017

**Aluminum Association**  
@AluminumNews

Great day @WhiteHouse w @POTUS on aluminum trade action to level playing field -- here w Peter Navarro

5:49 PM - 27 Apr 2017

# ADVANCING OUR MARKETS

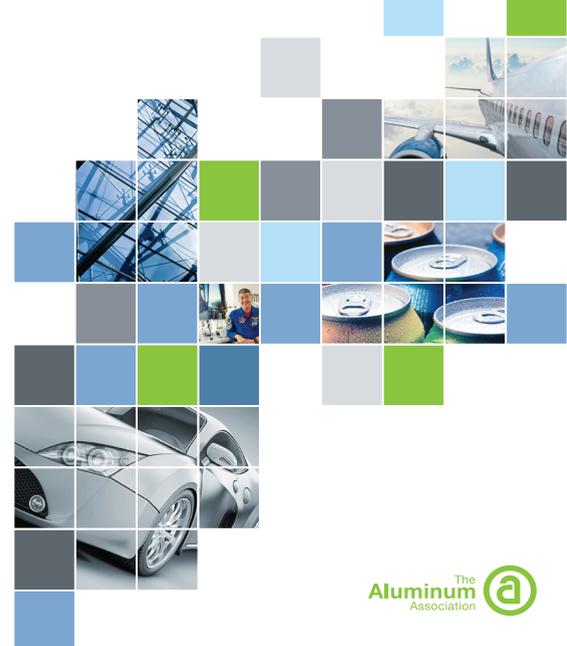
As the world continues to move toward a more sustainable future, aluminum is growing a key solution for innovative manufacturers looking to reduce their carbon footprint. As a key source of data and information — on statistics, standards and environmental impact — the Aluminum Association plays a key role in encouraging the adoption of aluminum in the marketplace.



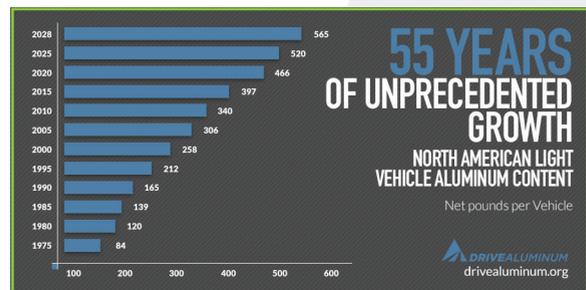
The association promotes aluminum as the sustainable material of choice to key stakeholders through research and reporting while the industry continues to modernize and advance its technology. In 2017, the association commissioned a variety of reports and publications essential to the future of the industry.

## 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](http://www.drivealuminum.org).



With a clean, modern and light design, the association's new meeting folders highlight some of aluminum's many benefits across various markets.



## STANDARDS & DATA 2017

The Aluminum Association published the latest version of its longest running publication, *Aluminum Standards and Data 2017* in both standard and metric editions. The book, which was last updated in 2013, includes comprehensive information on all commonly available alloys and mill products — an essential reference for anyone who works with the metal. The latest edition contains information on all commonly produced and used alloys and also reflects the changes to the American National Standards Institute (ANSI) standards maintained by the association. The publication is available for purchase on the association's website, and has already sold more than 600 copies and downloads.



## ALUMINUM WIRING IN AMERICA'S BUILDINGS

Aluminum wiring provides a cost-effective, lightweight & reliable solution for commercial, industrial and residential buildings.



Alloys  
Used

Aluminum is used in electrical systems such as wire, busbar, connections, armor, conduit, and transformer windings. Aluminum alloys used in electrical equipment include: 1350, 5154, 6061, 8xxx series (8030, 8176) and more.

Since 1987 the U.S. National Electrical Code requires the use of AA-8xxx series electrical-grade aluminum alloys for most building wire applications such as service entrance cables, feeders and branch circuits (Section 310.106(B)).

U.S.  
Code



40+  
Years

AA-8xxx series electrical grade alloys have been available and installed in buildings for more than 4 decades.



Dual  
Rated

Industry standards for dual-rated (Copper/Aluminum) terminations and connections ensure that devices are rated for use with aluminum wire.

The Aluminum Association released several market-oriented infographics in 2017, including this one on aluminum building wire.

The Aluminum Association 

## Aluminum in Green Buildings

A Guide to Green Building Development and Certification with Aluminum Products

Marshall Jinlong Wang



## GREEN BUILDING GUIDE

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.

## BUSINESS STATISTICS TELL THE INDUSTRY'S STORY

As global trade issues steered the industry's policy agenda in 2017, the association's Business Information & Statistics department played a key role – providing the foundational data to strengthen arguments with key policymakers throughout the year. The department provided members with up-to-date and relevant trade data; responded to requests for information from our government stakeholders (Sections 332 and 232 investigations for instance); and advanced the analyses that facilitated the association's unfair trade cases. All the while, the department continued to make improvements to its best-in-class statistical program, which included adjustments to ongoing extruded products reports and improving the quality of the trade data available to members and subscribers. The *Aluminum Statistical Review* for 2016, revealed the seventh straight year of consecutive demand growth for aluminum in North America but also record levels of foreign imports.

### AEROSPACE / AIRCRAFT

Aluminum has been used extensively in aircraft/ airplanes since the birth of modern aviation.

**1900's**

Aluminum is used throughout the aircraft to reduce weight, fuel consumption and greenhouse gas emissions while increasing cargo capacity.

Aluminum's lightweight, strength, corrosion resistance and versatility make it an ideal material for aircraft.

NASA has used aluminum for space shuttles, the International Space Station and most recently Orion and New Horizons spacecraft.

Aluminum is especially well-suited for space exploration thanks to its durability and toughness at low temperatures.

### TRAINS AND RAIL

Aluminum is used in railroad cars, commuter trains and high-speed trains all over the world.

Using aluminum helps lightweight the train, which leads to lower running costs, improved acceleration and braking.

The other advantages of aluminum in durability and corrosion resistance also provide low maintenance costs and long system life.

Using aluminum technology in trains enables reduced axle weight and optimizes passenger space, all while maintaining structural integrity and safety.

### AUTOMOTIVE

Cars and trucks made lighter with aluminum can go further on a tank of gas.

Every aluminum vehicle ever crash-tested by U.S. government agencies received a 5-star safety rating.

Aluminum truck trailers enable truckers to haul more. Each pound removed from the trailer weight can go into payload. Some trailers are all aluminum, frame to roof.

Aluminum's use in vehicles, from passenger to commercial, has been growing for more than 40 years.

### FREIGHT

#### WHEELS

Aluminum truck wheels are 40% lighter than comparable steel wheels. If aluminum wide-base wheels are used instead of narrow base wheels, weight savings can be even higher.

#### EXTRUSIONS

Aluminum trailer cross members, tractor frame rails, and rear under-ride protectors are several of opportunities for weight savings in commercial transportation.

#### BODY SHEET

Tractor cabs and closures, aerodynamic fairings, and trailer walls can all be significantly lightened by use of aluminum without sacrificing strength or performance.

#### 5.5% INCREASED EFFICIENCY

High aluminum use in freight vehicle applications can reduce weight up to 3,300 lbs per vehicle and result in freight efficiency savings of up to 5.5%. Aluminum is also strongly corrosion resistant during use and easily recyclable at end of life.

### MARINE

#### 100 YEARS OF USE

For more than a century, aluminum has been used in seagoing vessels from commercial to military to recreational.

#### DURABLE

Durable and long lasting, aluminum does not rust, therefore increasing marine vessel lifespan.

#### WORKABLE

Aluminum is corrosion resistant in the marine environment and also easy to fabricate thanks to its weldability.

#### SPEED-READY

Aluminum is used in the hulls, frames, decking and roofing of high-speed vessels like cruise ships, fast ferries and military boats.

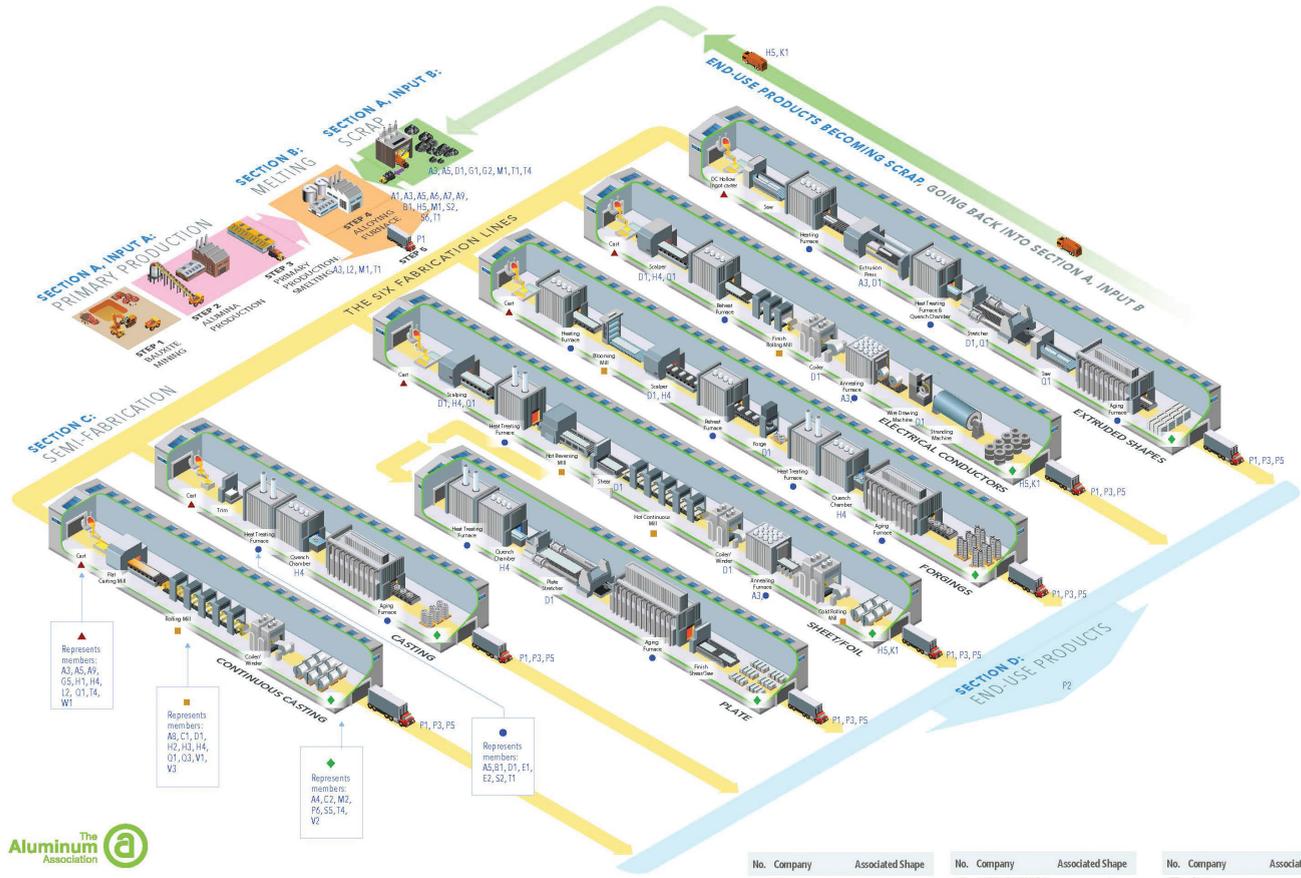
#### FUEL SAVERS

Lightweight aluminum helps boats improve fuel economy, safety and maintenance.

The association released infographics highlighting the advantages of aluminum use in various sectors of the transportation market.

# ASSOCIATE COMMITTEE

# PROVIDING VALUE THROUGH THE PROCESS



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.

**LEGEND: COMPANY REPRESENTATION**

- ▲ = Companies involved in Casting
- = Companies involved in Rolling
- ◆ = Companies involved in End Product
- = Companies involved in Furnaces

- Engineering & Construction F1, G3, G4, L1, P7, T2, W2
- PPE S4, T3, T5
- Research F1, P4, S1, W3
- Services A2, F1, I2, Q2, S3, T1

No.	Company	Associated Shape
A1	ABE AB	
A2	Agrium Consulting Group	
A3	Air Products	▲
A4	Alkali/Nobel Castings Inc.	◆
A5	Almax USA, Inc.	▲, ●, ◆
A6	Altek, LLC	■
A7	AMCOR	
A8	American Roller Bearing	■
A9	Avkrom International	▲
B1	Bloom Engineering Co. Inc.	●
C1	Calumet/Peneo Specialty Products	■
C2	Chemetal America	◆
D1	Daniel Corporation	■, ●, ◆
E1	Eberle Furnaces Inc.	●
E2	Epcor Industrial Systems, LP	●
F1	Falk PUI Engineering and Surveying	●
G1	Gamma-Tech, LLC	◆
G2	Gillette & Powers, Inc.	◆
G3	GMB Rebartry Construction & Industrial Services	■
G4	Gresham Smith and Partners	■

No.	Company	Associated Shape
G5	GWA Krefeld/GO USA	▲
H1	Hazlett Ship-Casting Corporation	▲
H2	Herkules North America	■
H3	Herr-Yoss Stano	■
H4	Houghton International, Inc.	■
H5	Hunter Douglas Metals	■
I2	Impression Technologies	■
K1	Kripke Enterprises	■
L1	Life Cycle Engineering	■
L2	Linds, LLC	▲
M1	Magneco/Metrel	■
M2	Material Sciences Corporation	◆
P1	Page Transportation	■
P2	Penny Plate, LLC	●
P3	Penske Logistics LLC	■
P4	Phnix, LLC	◆
P5	PLS Logistics Services	■
P6	PPG Industries	◆
P7	Project Integration, Inc.	■
Q1	Quaker Chemical Corporation	■

No.	Company	Associated Shape
Q2	Quant	■
Q3	Quicksift	■
S1	Seair, Inc.	■
S2	SFCO Warwick Corporation	●
S3	SMS Technical Services	●
S4	Steel Grip, Inc.	■
S5	Steelcooper	◆
S6	Supragen Flux	■
T1	Tane Energy Supply Services	●
T2	TRC Environmental Corp.	■
T3	Ti-Star Glove	■
T4	TSI Inc.	▲, ◆
T5	Tyndale Company Inc.	■
V1	Vul Rubber Works, Inc.	■
V2	Vahpar	◆
V3	Voith Turbo, Inc.	◆
W1	Wegstaff, Inc.	▲
W2	Walbridge Industrial Process	■
W3	Westonland Mechanical Testing & Research	■



GETTY

⬆ 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.



DAVE BOHRER/NATIONAL ASSOCIATION OF MANUFACTURERS



DEPARTMENT OF COMMERCE

⬆ 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).



RODNEY CHOICE PHOTOGRAPHY



RODNEY CHOICE PHOTOGRAPHY

⬅ Mark Eliopoulos (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.



RODNEY CHOICE  
PHOTOGRAPHY



The Aluminum Association's Technical Committee on Product Standards meets at association headquarters to discuss priorities for 2018.



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.



RODNEY CHOICE  
PHOTOGRAPHY



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



CNN

**U.S. HITS CHINA WITH ALUMINUM FOIL TAX**

LIVE

CNN

10:38 PM CET

@questCNN



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.



NOVELLIS



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

# ALUMINUM COUNTRY



LOGAN ALUMINUM

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.

**N**ot 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!"



ALERIS

Trump to Order Probe  
Into Aluminum Imports

THE ASSOCIATED PRESS

Bowling Green Getting  
Aluminum Plant

COURIER-JOURNAL (KENTUCKY)

How Chinese Overcapacity  
Hits American Workers

THE ECONOMIST

Administration Hands U.S.  
Aluminum Industry  
a Win Over China

POLITICO

Aluminum in Vehicles to  
See 'Unprecedented Growth'

AUTO SERVICE WORLD

Aluminum Market:  
Holding China to Account

WALL STREET JOURNAL

Is this the Start of a Hot,  
New Metals Market?

FORBES

## ALUMINUM IN THE NEWS

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.



Heidi Brock

@HeidiBiggsBrock

Following

Congratulations @AluminumNews member @Aleriscorp on today's celebration of the new #aluminum #automotive body sheet production facility in Lewisport, #Kentucky - a shining jewel of US #worldclass #manufacturing



5:22 PM - 16 Nov 2017 from Aleris Rolled Products

## 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.

### The Aluminum Association Aluminum Week September 8, 2017



Donald J. Trump   
@realDonaldTrump

Follow 

We are building our future with American hands, American labor, American iron, aluminum and steel. Happy #LaborDay!



12:38 PM - 4 Sep 2017

**Aluminum Transportation Group chairman Ganesh Panneer [told the aluminum industry's story](#) and called for "regulatory certainty" during an EPA hearing this week** that effectively kicked off the reopened midterm review of vehicle fuel economy. And **aluminum made the cut for [President Trump's "Happy Labor Day" tweet](#)** on Monday (see above). Always nice to see that the president continues to tout the benefits of our industry. Finally, **the Aluminum Association**



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



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

## 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!



REED EXHIBITIONS

The Aluminum USA trade show beat records bringing more than 1,500 industry stakeholders to the Music City Center in Nashville, TN in October.



(Back): Julia Gazizova, Ryan Olsen, Karen Bowden, Curt Wells, Jack Cowie, Debra Weston, Matt Meenan, Lauren Wilk and Joe Quinn.  
 (Front) Hank Sattlethight, Katie Rosebrook, Madeleine Smith, Heidi Brock and John Weritz. (Not pictured) Marshall Wang and Francesca Licari.

## 2017 A RECORD YEAR FOR ALUMINUM ASSOCIATION MEETING ATTENDANCE



# FINANCIALS

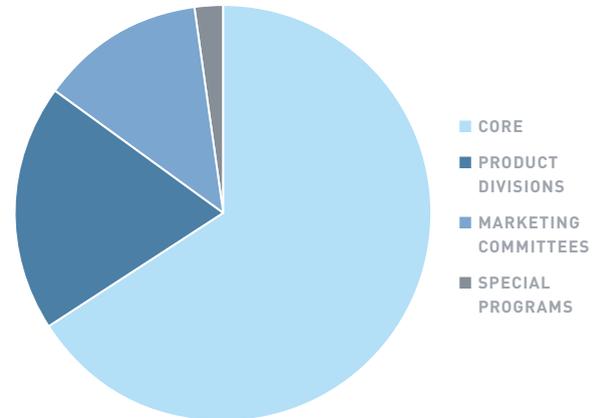
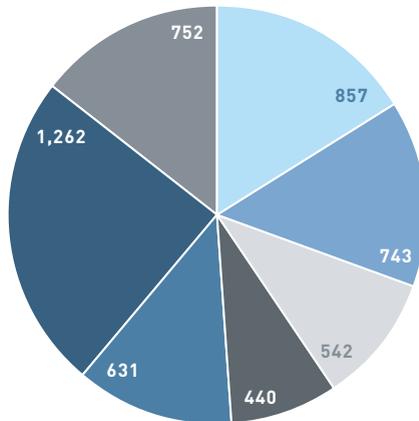
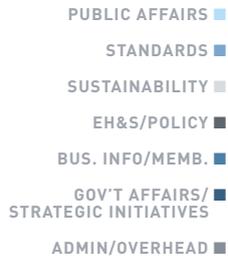
## PROGRAM COST 2017 — \$5.23M

OFFSET BY \$350,000 IN CROSS CHARGES

## BUDGETED PROGRAM SPENDING

2017 — \$7.7M

### TOTAL COST \$'000



## ALUMINUM PAC DONOR HONOR ROLL



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  
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### PRESIDENTIAL SUITE (\$2,500 — \$4,999)

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Alcoa PAC

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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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