



2019 ANNUAL REPORT

ALUMINUM MAKES **AMERICA** MAKES ALUMINUM

2019 was a year of leadership and change for the U.S. aluminum industry and the Aluminum Association. The association led a successful advocacy effort to remove Section 232 tariffs on key trading partners: Canada and Mexico. And, investment continued in the wake of successful trade enforcement actions in the aluminum foil and common alloy sheet markets. With a focus on innovation, the industry became the first ever to develop a material standards designation system for the fast-growing 3D printing market. Thanks to the industry's work on sustainability, aluminum cans continued to make strides against plastic and glass in the packaging segment. In partnership with the automotive industry, the Aluminum Transportation Group launched a series of design courses

to educate automakers on how to use aluminum in future vehicles.

This year, we also released the Aluminum Agenda – a comprehensive policy roadmap for a competitive and sustainable domestic aluminum industry in the 21st century. The agenda focuses on key issue areas for the industry – Energy, Environment, Infrastructure, Trade and Workforce. In these pages, we'll articulate how we're already working to achieve many of our key policy goals. A living document, the Aluminum Agenda will serve as a North Star for the association and the industry for years to come.

We also said goodbye to the Aluminum Association's president & CEO of nearly eight years, Heidi Brock, who left the association to take on a new career challenge. Heidi left an indelible mark on the industry during her time at the helm of "Team Aluminum." But, we're looking forward to announcing – in short order – a new leader for the Aluminum Association.

We're confident that the new person will help us build on successes of the past and position the industry for even greater success in the future.

Thank you for your support of our important work together. I am looking forward to our continued success in 2020.



Marco Palmieri
Senior Vice President & President,
Novelis North America
Aluminum Association Chair



***“The Aluminum Agenda will
serve as a North Star for the association
and the industry for years to come.”***



2019 BY THE NUMBERS

162,000

direct jobs supported
in USA

▲ 3.5% since 2013

\$3B+

invested since 2013

395 aluminum
plants in USA

39 states with
aluminum presence

572 registered
alloys

and counting!

50 Aluminum
Caucus members

50%+ aluminum
demand increase

since 2009

\$72,000+

raised for AluminumPAC

128 member
companies

record year

33,000+

total followers across
all digital

▲ around 28%

34 ongoing
statistical reports

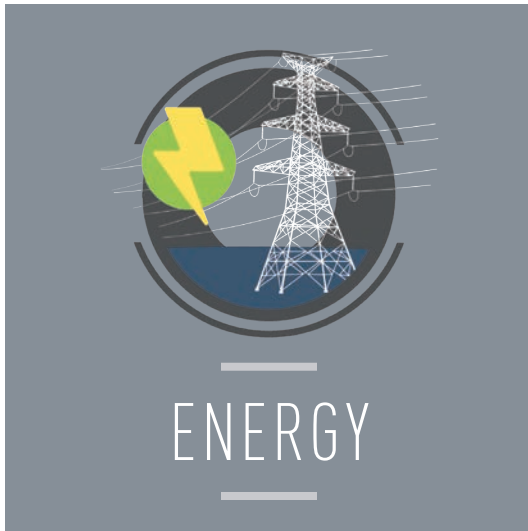
247 meeting
registrations

record year

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 advocate for regulatory and legislative policies that improve the competitiveness of the U.S. aluminum industry.
- 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.



ENSURE CONTINUED ACCESS TO RELIABLE, AFFORDABLE AND EFFICIENT DOMESTIC ENERGY SOURCES. PROMOTE ALUMINUM RECYCLING TO SUPPORT SECONDARY PRODUCTION.

ALUMINUM CAN REMAINS MOST SUSTAINABLE BEVERAGE CONTAINER

A 2019 report by the Aluminum Association and the Can Manufacturers Institute showed that aluminum cans beat the competition when it comes to sustainability. The report, "The Aluminum Can Advantage: Key Sustainability Performance Indicators 2019," found that consumers recycle aluminum cans at almost twice the rate of glass or plastic bottles, and that aluminum cans have more than three times the recycled content of glass and almost 25 times more than plastic. Aluminum continues to grow its share of the beverage container market as more companies are turning to sustainable solutions.

ALUMINUM HELPS AMERICA RECYCLE

With recycling increasingly a top-of-mind issue with policymakers and the public, the Aluminum Association was recognized as part of the Environmental Protection Agency's (EPA) *National Framework for Advancing the U.S. Recycling System* and participated in roundtable discussion with EPA Administrator Andrew Wheeler on America Recycles Day (ARD) in November. This was a continuation of efforts throughout the year as the association was an active member of the EPA's ARD coalition – working on issues ranging from recycling rate measurement criteria to promotion of recycling in communities nationwide. The Aluminum Association previously joined dozens of major brands, foundations, nonprofits and trade associations signing a pledge to work collaboratively to improve the nation's recycling system. Aluminum is a critical linchpin for U.S. recycling as the only beverage container type that generates a net profit for municipal recycling programs.



Happy America Recycles Day!

Aluminum is a 100 percent recyclable and sustainable metal. In fact, nearly 75 percent of all aluminum ever produced is still in use today.



#AmericaRecycles



ALUMINUM CANS CONTAIN MORE THAN 3X THE RECYCLED CONTENT OF GLASS OR PLASTIC BOTTLES

73%
ALUMINUM CANS

23%
GLASS

3%
PLASTIC (PET)



Learn more at www.aluminum.org/CanAdvantage



“The 2019 report details how the aluminum beverage can has again had superior results ... compared to other beverage container materials.”

— ENVIRONMENTAL PROTECTION AGENCY
NATIONAL FRAMEWORK FOR
ADVANCING THE U.S. RECYCLING SYSTEM; NOVEMBER 15, 2019

Aluminum's Carbon Footprint is Getting Smaller
AUTOMOTIVE NEWS

The Value of Aluminum Recycling
RECYCLING TODAY

The United States Aluminum Tariff Wall is Crumbling
REUTERS

Don't Crush Cans Before Recycling Them
LIFEHACKER

Aluminum is Replacing Plastic as the Greenest Bottle
BLOOMBERG

MEDIA

ALUMINUM IN ACTION

While global trade remained central to the association's public activity in 2019, other issues also came to the fore and drove media attention - including moves to aluminum packaging amidst the growing plastic pollution crisis, a new aluminum alloy designation system for 3D printing and aluminum's contribution to fuel conservation in the automotive sector.



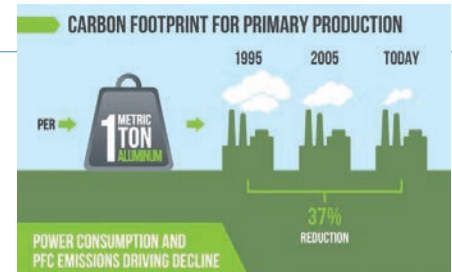
DEVELOP COMMON SENSE, SCIENCE-BASED REGULATION IN AREAS INCLUDING AIR AND WATER QUALITY, CHEMICAL REPORTING AND VEHICLE FUEL ECONOMY STANDARDS.

SUSTAINABILITY ADVISORY COUNCIL KICKS INTO HIGH GEAR

As the United States and the rest of the world strive for a more sustainable future, aluminum is a big part of the solution. To that end, the association's Board of Directors established a new Sustainability Advisory Council in the spring of 2019 to address key sustainability issues facing the aluminum industry. The council, which comprises eight member company representatives, met throughout the year to develop objectives, assess strategies and share specific recommendations for action with the board. Be on the lookout in 2020 for news from the Sustainability Advisory Council.

ASSOCIATION ENGAGES ON CLIMATE POLICY

Climate policy is a growing part of the conversation in Washington, D.C. and around the world. In 2019, the Aluminum Association reviewed its past climate change advocacy efforts and worked with members to revise its carbon policy principles. Based on these changes, the association has provided input to the House Energy and Commerce Committee and the House Select Committee on the Climate Crisis to ensure that they receive and understand the aluminum industry's position as they develop climate change legislation. Advocacy to date will form the foundation of the association's expected extensive additional engagement in 2020 on this important issue.



Council members include representatives from Alcoa, Arconic, Hydro, Kaiser Aluminum, Novellis, Rio Tinto and Southwire.

Lauren Wilk
@_laurenwilk

The North American aluminum industry continues to innovate, reducing overall emissions while helping automakers produce cars & trucks that go farther on a gallon of fuel or a battery charge. In [@Automotive_News: autonews.com/letter-editor/...](https://www.automotive-news.com/letter-editor/) [@AluminumNews @DriveAluminum](https://www.aluminumnews.com)



ALUMINUM LIGHTWEIGHTING VITAL TO CONTINUED FUEL ECONOMY GAINS

As debate continues about the future of vehicle fuel economy standards both nationally and in the states, automakers continue to look to lightweight materials like aluminum to produce better-performing, more fuel efficient cars and trucks. Following three straight years of record shipments of automotive aluminum to market, the association's Aluminum Transportation Group (ATG) continues to make the case for aluminum in Washington and beyond. Numerous independent safety experts noted the importance of materials like aluminum in safely and affordably meeting future fuel economy challenges. As National Highway Transportation Safety Administration (NHTSA) Administrator Heidi King noted in a June 2019 congressional testimony, "Lightweighting is very important. It is not unsafe. Lightweighting is one of the most – and I believe it is the most – cost-effective ways to achieve increased fuel economy."

“Lightweighting is ... the most cost-effective way to achieve increased fuel economy.”


— HEIDI KING, ADMINISTRATOR,
NATIONAL HIGHWAY TRANSPORTATION SAFETY ADMINISTRATION;
CONGRESSIONAL TESTIMONY; JUNE 20, 2019



NEW VIDEO: DRIVE ALUMINUM TOMORROW

The Aluminum Transportation Group released a new video in 2019 highlighting the benefits of automotive aluminum. The video notes how aluminum beats the competition in terms of performance, sustainability, safety and value. Watch the video at www.drivealuminum.org.

**ALUMINUM
IN ACTION**



INFRASTRUCTURE

INCREASE LONG-TERM PUBLIC AND PRIVATE FUNDING AND ENACT VARIOUS REFORMS TO RECOGNIZE THE BENEFITS OF SUSTAINABLE MATERIALS TO HELP SHORE UP THE NATION'S HIGHWAYS, TRANSIT SYSTEMS, ELECTRIC GRID AND OTHER CRITICAL INFRASTRUCTURE.

U.S. ARMY CORPS OF ENGINEERS ADDS ALUMINUM PIPE TO DESIGN MANUAL



US Army Corps of Engineers®

Over the last three years, the U.S. Army Corps of Engineers (USACE) involved various stakeholders in updating its current design manual, which was last revised in 1998. The Aluminum Association participated throughout this process and successfully gained acceptance of aluminum pipe and culvert in its primary manual for engineers. This was a significant win for the industry and will enable the increased use of aluminum in future civil works projects. This effort follows similar work in recent years to include aluminum as an accepted material for bridge construction in various state department of transportation guidelines.

Metal fabricating publication *FF Journal* featured the Aluminum Association's new designation system for 3D printing aluminum powder.

ALUMINUM ASSOCIATION INTRODUCES FIRST-EVER MATERIAL DESIGNATION SYSTEM FOR 3D PRINTING

For the first time in 20 years, the association added a new material registration record to the "rainbow sheet" series. The new "purple sheets" provide clear chemical designations for aluminum powder used in 3D printing. As companies continue to innovate in additive manufacturing, the aluminum industry will play a major role. Aluminum is the first materials industry to develop such a system specific to the 3D printing market, and the "purple sheets" will help companies gain wider acceptance in commercial applications and promote the material's use.



December 2019

FF Journal

The magazine for today's metal fabricating & forming technologies
www.ffjournal.net

ALUMINUM RISING
Lab cracks code to invent first registered additive feedstock

STAMPING/PRESSES
The right foundation can make or break a press install

SOFTWARE/ERP
Industry-built system makes complex operations simple

METALS AND METALWORKING SEARCH.COM
Your premier search engine for equipment, materials, commodities & services

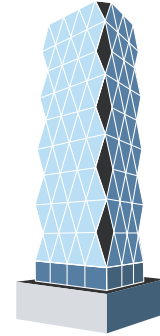
“For the first time ever, a materials industry has developed a designation system specific to additive manufacturing, opening tremendous growth potential.”

— JEROME FOURMANN, RIO TINTO; TECHNICAL COMMITTEE ON PRODUCT STANDARDS CHAIR; APRIL 23, 2019



NEW MARKET STUDY FOR REVITALIZED BUILDING & CONSTRUCTION COMMITTEE

The building and construction segment, the third largest market for aluminum, is key to industry growth. Each year, U.S. producers ship more than 3 billion pounds of aluminum for use in building and construction projects across North America. This year, the association's Building and Construction Committee committed to a significant new market study, examining aluminum's challenges and opportunities in the residential housing market. The group also transitioned leadership to a new committee chair and committed to increased activity. The study, expected early next year, will help guide the committee's work moving into 2020 and beyond.



APOLLO 11 AT 50

July 20, 2019, marked the 50th anniversary of Apollo 11 landing the first man on the moon. The historic mission was decades in the making, and aluminum and its alloys played a key role in getting humans into space and onto the moon. To celebrate Apollo 11 at 50, the Smithsonian National Air and Space Museum projected a light show of the Saturn V rocket launch onto the Washington Monument – another piece of American history, which boasts an aluminum capstone.

ALUMINUM IN ACTION

A YEAR IN PHOTOS

Members of the Aluminum Association visited dozens of offices on Capitol Hill during our annual member fly-in.



RODNEY CHOICE PHOTOGRAPHY



Immediate past chair Michelle O'Neill and former President & CEO Heidi Brock celebrate the removal of Section 232 tariffs in North America.

RODNEY CHOICE PHOTOGRAPHY



Board members Sean Stack, Aleris, and Terry Hogan, Real Alloy, catch up at a reception in Washington, D.C.



Global aluminum leaders from the U.S., Canada and Europe highlight the challenge of Chinese overcapacity at an OECD forum.



Arconic's Mike Belwood receives the Marlan T. Boultinghouse award for service to the aluminum industry.

RODNEY CHOICE PHOTOGRAPHY

Association member Fiona Bell, Novelis, moderates a trade policy panel at the annual meeting.

RODNEY CHOICE PHOTOGRAPHY





Aluminum Association staff and members participated in the Aluminum Stewardship Initiative (ASI) meetings in Norway.



Joe Quinn joins immediate past chair Michelle O'Neill and Reed Exhibition's Michael Mandl at the biennial ALUMINUM USA trade show in Nashville, TN.



The Aluminum Association held a reception at The Riviera Theater in Charleston, SC, during the spring meeting.



Board member Lisa Scheller, Silberline, and Heidi Brock meet with Aluminum Caucus member Rep. Cathy McMorris Rodgers (R-WA).



RODNEY CHOICE PHOTOGRAPHY

New Chair Marco Palmieri, Novells, recognizes Michelle O'Neill, Alcoa, and her two years of service as chair of the association.



Association leadership and staff celebrate 100 years of the Hazelett Corporation.

The Aluminum Agenda

Policy Roadmap for a Sustainable and Competitive U.S. Aluminum Industry

ENERGY

Aluminum producers are committed to energy efficiency as a way to lower costs and lessen environmental impact, and require diverse, affordable and reliable energy sources.

ENVIRONMENT

Sustainability is at the core of our business, and U.S. aluminum producers recognize that regulations should balance promoting economic growth and protecting our environment.

INFRASTRUCTURE

Sustainable materials like aluminum are a critical component of the infrastructure investments we must make to maintain our competitiveness in the 21st century.

TRADE

The globally integrated U.S. aluminum industry benefits from robust, fair and rules-based trade of aluminum and aluminum products.

WORKFORCE

Like many in the manufacturing sector, the aluminum industry has a growing need for skilled workers trained in both traditional and advanced manufacturing techniques.

TAKE ACTION TO SUPPORT ALUMINUM



Now is the time to take action supporting the U.S. aluminum industry in an increasingly competitive global marketplace.

Address Subsidized Overcapacity

Renew focus on strong trade enforcement and address structural aluminum overcapacity in China through negotiations.

Increase Domestic Recycling

Improve national recycling system through increased funding for infrastructure and promoting curbside and other municipal recycling programs.

Remove Section 232 Tariffs

Remove Section 232 tariffs on all market economy trading partners.

Improve Vehicle Fuel Economy

Ensure that fuel economy regulations are fact-based and support continued improvements and innovation in the U.S. vehicle fleet.

Support National Infrastructure Bill

Pursue a comprehensive national infrastructure bill that recognizes the benefits of sustainable materials to improve the nation's transportation and other critical public systems.

INDUSTRY IMPACT

75%



Nearly 75 percent of all aluminum ever produced is still in use today.

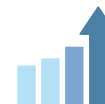
27+



BILLION POUNDS

At 27+ billion pounds, domestic demand for aluminum is at record levels since tracking began in 1960.

\$3+ BILLION



Aluminum Association member companies have invested more than \$3 billion in U.S. manufacturing since 2013.

40%



Since 1995, the industry's carbon footprint has declined nearly 40 percent thanks to efficiency gains, recycling growth and an increased use of renewable hydropower.

ASSOCIATION LAUNCHES ALUMINUM AGENDA

In April, the Aluminum Association released a brand-new policy framework – *The Aluminum Agenda: A Policy Roadmap for a Competitive U.S. Aluminum Industry*. The roadmap lays out principles and policy goals for a sustainable U.S. aluminum sector in the 21st century. Developed in consultation with aluminum companies spanning the entire industry value chain, the agenda identifies five key areas essential for future growth and investment in the U.S.: Energy, Environment, Infrastructure, Trade and Workforce. In addition to longer-range goals and principles, the Aluminum Agenda lists a number of near-term policy priorities to support the industry as well as the broader manufacturing sector. The association has been working hard to advocate for the Aluminum Agenda with policymakers. Members participated in Capitol Hill fly-ins and invited members of Congress to facilities in their districts to talk to them about the industry and the policy roadmap – efforts that have resulted in increased participation in the bipartisan Congressional Aluminum Caucus.



A digital ad campaign promoting the Aluminum Agenda generated more than 1.2 million video views from D.C. influencers and policymakers.

“The Aluminum Agenda will help ensure that growth is sustainable for the long-term.”

—MICHELLE O’NEILL; ALUMINUM ASSOCIATION IMMEDIATE PAST CHAIR; APRIL 29, 2019

ALUMINUM AGENDA AD CAMPAIGN

ALUMINUM IN ACTION

The association created a series of six videos to help promote the Aluminum Agenda and launched a digital ad campaign in coordination with the 2019 annual meeting. The campaign’s goal was to increase awareness of the Aluminum Agenda for Capitol Hill staff and industry stakeholders using Facebook and Instagram. During the one-month campaign, the association’s target audience played the clips more than 1.2 million times and drove increased traffic to the Aluminum Agenda’s landing page at www.aluminum.org/agenda/.



Congresswoman Haley Stevens (D-MI) joined the bipartisan Congressional Aluminum Caucus after meeting with members of the Government Affairs Committee.



TRADE

NEGOTIATE WITH CHINA TO ADDRESS STRUCTURAL ALUMINUM OVERCAPACITY, ELIMINATE TRADE BARRIERS FOR COUNTRIES THAT PLAY BY THE RULES AND PURSUE TARGETED TRADE ENFORCEMENT FOR COUNTRIES THAT DO NOT.

NO TARIFFS, NO QUOTAS – A WIN FOR ALUMINUM

In May, President Trump announced that the United States reached a deal with Canada and Mexico to reinstate exemptions from the Section 232 aluminum tariffs – without quotas. The action was a major victory for the aluminum industry and the Aluminum Association, which has consistently called for quota-free exemptions for North American aluminum. Removing the Section 232 tariffs on Canada and Mexico, as well as removing the retaliatory tariffs throughout North America is key to

our strong, integrated aluminum market. The free, open and well-monitored trade of aluminum is a critical element of a successful U.S.-Mexico-Canada Agreement (USMCA).



“Imports from Canada and Mexico will no longer threaten to impair national security and I have therefore decided to exclude Canada and Mexico from the tariff.”

— PRESIDENT DONALD J. TRUMP; PROCLAMATION 9893
ADJUSTING IMPORTS OF
ALUMINUM TO THE UNITED STATES; MAY 19, 2019



LAYING THE FOUNDATION FOR THE
**FUTURE OF NORTH
AMERICAN TRADE**



The Aluminum Association joined hundreds of businesses and nonprofits calling for the passage of the U.S.-Mexico-Canada Agreement with the campaign #USMCANow.



Proclamation 9893

PRESIDENTIAL DOCUMENTS OF THE FEDERAL REGISTER

ADJUSTING IMPORTS OF ALUMINUM INTO THE UNITED STATES

(PROCLAMATION 9893 OF MAY 19, 2019)

Donald Trump
President of the United States
Sunday, May 19, 2019

On January 19, 2018, the Secretary of Commerce (Secretary) transmitted to me a report on his investigation into the effect of imports of aluminum articles on the national security of the United States under section 232 of the Trade Expansion Act of 1962, as amended (19 U.S.C. 1862). The Secretary found and advised me of his opinion that aluminum articles were being imported into the United States in such quantities and under such circumstances as to threaten to impair the national security of the United States.

2. In Proclamation 9704 of March 8, 2018 (Adjusting Imports of Aluminum Into the United States), I concurred in the Secretary's finding that aluminum articles were being imported into the United States in such quantities and under such circumstances as to threaten to impair the national security of the United States, and decided to adjust the imports of aluminum articles, as defined in clause 1 of Proclamation 9704, by imposing a 10 percent ad valorem tariff on such articles imported from most countries.

3. In Proclamation 9704, I further stated that any country with which we have a security relationship is welcome to discuss with the United States alternative ways to address the threatened impairment of the national security caused by imports from that country, and noted that, should the United States and any such country arrive at a satisfactory alternative means to address the threat to the national security such that I determine that imports from that country no longer threaten to impair the national security, I may remove or modify the restriction on aluminum articles imports from that country and, if necessary, adjust the tariff as it applies to other countries, as the national security interests of the United States require.

4. The United States has successfully concluded discussions with Canada and Mexico on satisfactory alternative means to address the threatened impairment of the national security posed by aluminum imports from Canada and Mexico. The United States has agreed on a range of measures with Canada and Mexico to prevent the importation of aluminum that is unfairly subsidized or sold at dumped prices, to prevent the transshipment of aluminum, and to monitor for and avoid import surges. These measures are expected to allow imports of aluminum from Canada and Mexico to remain stable at historical levels without meaningful increases, thus permitting the domestic capacity utilization to remain reasonably commensurate with the target level recommended in the Secretary's report. In my judgment, these measures will provide effective, long-term alternative means to address the contribution of these countries' imports to the threatened impairment of the national security.

5. In light of these agreements, I have determined that, under the framework in the agreements, imports of aluminum from Canada and Mexico will no longer threaten to impair the national security, and thus I have decided to exclude Canada and Mexico from the tariff proclaimed in Proclamation 9704, as amended. The United States will monitor the implementation

(5) Any provision of previous proclamations and Executive Orders that is inconsistent with the actions taken in this proclamation is superseded to the extent of such inconsistency.

IN WITNESS WHEREOF, I have hereunto set my hand this nineteenth day of May, in the year of our Lord two thousand nineteen, and of the Independence of the United States of America the two hundred and forty-third.

DONALD J. TRUMP

CHANGES TO ALUMINUM TRACKING CODES SUPPORT STRONGER TRADE ENFORCEMENT

The Aluminum Association successfully advocated for more than 40 changes to the Harmonized Tariff Schedule (HTS) codes for aluminum imports in 2019. This unusually high number of successful change requests will enable industry stakeholders to track aluminum trade flows with greater precision, making it easier to identify and address aluminum misclassification, transshipment and evasion of duties. The association hosted Customs & Border Protection officials from ports across the country in Charleston, SC, for a plant tour and seminar on the aluminum industry, its trade remedy cases and the HTS code changes. We continue to advocate for stronger trade enforcement measures in the United States, including the development of an aluminum import monitoring system.



Aluminum Association tours the Port of Charleston with member company JW Aluminum.

OECD HIGHLIGHTS ALUMINUM OVERCAPACITY IN NEW REPORT

In January, the Organisation for Economic Co-operation and Development (OECD) released a report, “Measuring distortions in international markets: the aluminium value chain,” that places particular emphasis on unfairly subsidized aluminum produced in China. “Chinese firms obtained all of their support from Chinese authorities, notably financial subsidies, which overwhelmingly benefited Chinese producers,” the report notes. The study, which is the first OECD has produced on the aluminum industry specifically, focuses on subsidies and other government support that has distorted the international aluminum market.

And an interesting dimension highlighted in the aluminum report was the pervasiveness of the problem up and down the value chain. “Excess capacity thus appears to be a genuine concern in aluminium, and one with implications for global competition and the design of trade rules disciplining government support.” The study extensively documents various subsidy programs and included input from producers and governments around the world.

JOINT STATEMENT OF ALUMINIUM ASSOCIATIONS

“Reinforced by the strength of the OECD report, we hereby reiterate our call for global political leaders to begin the process of setting new, more effective rules on subsidies and SOEs to put an end to market distortive practices.”



Aluminium Association of Canada



EUROPEAN ALUMINIUM



CONGRESSIONAL ALUMINUM CAUCUS

ALUMINUM IN ACTION

The bipartisan Congressional Aluminum Caucus serves an important function by telling the aluminum story and educating federal policymakers on issues impacting the U.S. industry. In 2019, the caucus continued to play a major role in supporting the industry and its workers. Among other activities this year, in the fall the caucus co-chairs – joined by two dozen colleagues – sent a bipartisan letter to Commerce Secretary Wilbur Ross calling for the creation of an aluminum import monitoring system.

ASK: JOIN THE ALUMINUM CAUCUS

“There are mounting concerns ... that large capacity additions in China and elsewhere may have led to excess capacity in the aluminium industry ... threatening the viability of producers worldwide.”

— OECD REPORT; MEASURING DISTORTIONS IN INTERNATIONAL MARKETS: THE ALUMINIUM VALUE CHAIN; JANUARY 7, 2019



The Aluminum Association and members host a briefing for House Ways & Means Committee staff on the need for quota-free tariff exemptions for North American trading partners.

GLOBAL INDUSTRY ACTS ON TRADE

The Aluminum Association once again worked closely with international partner associations to take action on issues impacting the global industry. From issuing joint letters with Canada and Mexico calling for quota-free Section 232 tariff exemptions, to

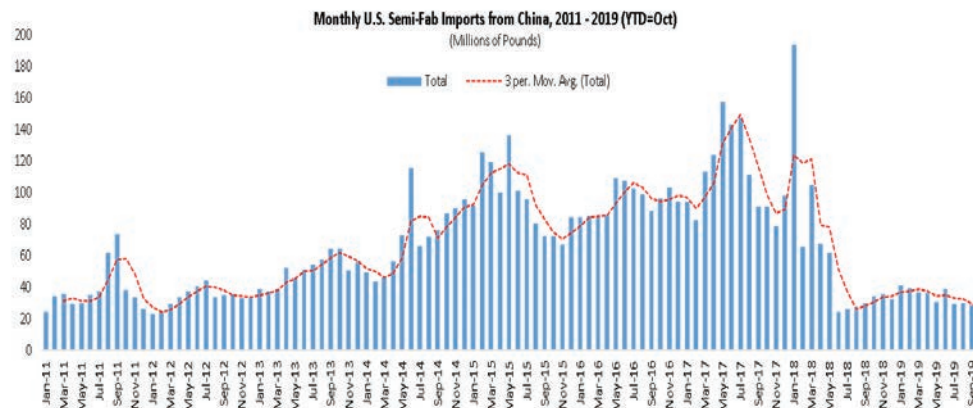


Ryan Olsen, vice president, business information & statistics, participates in the OECD's Global Trade Forum in Paris, France.

calling for G7 leaders to act on market-distorting behaviors, to participating in a panel discussion on aluminum overcapacity at the Organisation for Economic Co-operation and Development's (OECD) Global Trade Forum – it was a busy but productive year with global associations working together to level the playing field.

INVESTMENTS UP, IMPORTS FROM CHINA DOWN AFTER SUCCESSFUL AD/CVD ACTION

In 2018, the Aluminum Association successfully completed two anti-dumping and countervailing duty cases against unfair imports of Chinese aluminum foil and common alloy sheet. In 2019, the industry felt the impact as imports from China in these markets dropped significantly while investment surged. Indeed, since final duties on such imports were announced, U.S. companies have invested more than \$169 million in the aluminum foil market alone. The upshot? Targeted trade enforcement can make a real impact combatting unfair trade practices abroad and supporting investment here at home.



Imports of aluminum from China to the United States declined sharply thanks to trade enforcement efforts in targeted markets.



CASTHOUSE SAFETY WORKSHOP TRAINS 200

The association held two Casthouse Safety Workshops – the global benchmark in safety training for the molten aluminum environment – in 2019. Around 200 attendees from across the country and abroad participated in interactive sessions designed to increase knowledge in all areas of molten aluminum safety, including scrap handling, furnace charging, transfer operations, casting practices and combustible dust. Member safety experts volunteer their time to present on safety standards, share best practices and work with attendees to further improve facility safety performance. The Casthouse Safety Workshop is just one way the association works to educate all levels of industry employees on workplace safety.



Industry experts talk molten metal safety and best practices during the association's Casthouse Safety Workshops.

INDUSTRY ASSOCIATIONS COLLABORATE ON INAUGURAL ALUMINUM SAFETY SUMMIT

The Aluminum Association worked with the Aluminum Extruders Council (AEC), Aluminum Anodizers Council (AAC) and the Aluminum Recyclers Council (ARC) to host the first Aluminum Safety Summit. This two-day event brought together nearly 100 safety professionals, managers and plant floor personnel to learn how best to advance safety culture within companies toward the goal of zero safety incidents. The association coordinated in planning and executing the summit, in which 13 association member companies participated. The Aluminum Safety Summit is the latest example of the entire value chain working together toward a common goal of a safer, healthier aluminum workforce.



SPRING 2019

ALUMINUM

Design Seminar

Advanced Aluminum Applications for Automotive

Tech Town
DETROIT
440 Burroughs Street

May 1 + 2
Day 1: 8 AM - 6 PM
Day 2: 8 AM - 4 PM




ALUMINUM DESIGN WORKSHOP EDUCATES ENGINEERS IN DETROIT AND NASHVILLE

The Aluminum Transportation Group (ATG), the association's automotive market committee, hosted two Aluminum Design Workshops in Detroit and Nashville this year. The ATG welcomed national and international engineers from Ford, General Motors, Honda, Toyota and Fiat Chrysler Automobiles to hear from technical experts at leading aluminum producer companies, including Aleris, Arconic, Constellium, Hydro, Novelis and Rio Tinto. The content included a deep-dive into alloy and temper designations, sheet properties, common extrusion alloys, recyclability and a hands-on demonstration featuring various aluminum vehicle parts. The workshop educates engineers on the many benefits of aluminum in the design of safe, sustainable, durable, efficient and corrosion-resistant vehicles. It will continue its success with fresh perspective, speakers and content for 2020.



STEVEN PHAM PHOTOGRAPHY

ATG technical leaders present to automakers on aluminum design principles.

ALUMINUM PAC

ALUMINUM IN ACTION

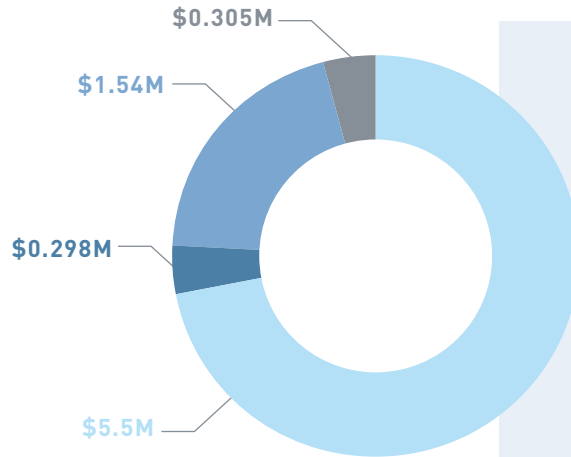
The Aluminum Association political action committee - Aluminum PAC - was created to support officeholders who support a strong U.S. aluminum industry. The PAC is a key tool in the association's advocacy toolbox to increase the industry's profile, build credibility and develop long-term relationships with lawmakers. 2019 was a record year for PAC donations - nearly doubling the previous record.



STEVEN PHAM PHOTOGRAPHY

“Managers and plant floor personnel learn how best to advance safety culture within companies toward the goal of zero safety incidents.”

FINANCIALS



BUDGETED PROGRAM SPENDING

2019 - \$7.6M

- CORE
- MARKET COMMITTEES
- PRODUCT DIVISIONS
- SPECIAL PROGRAMS*

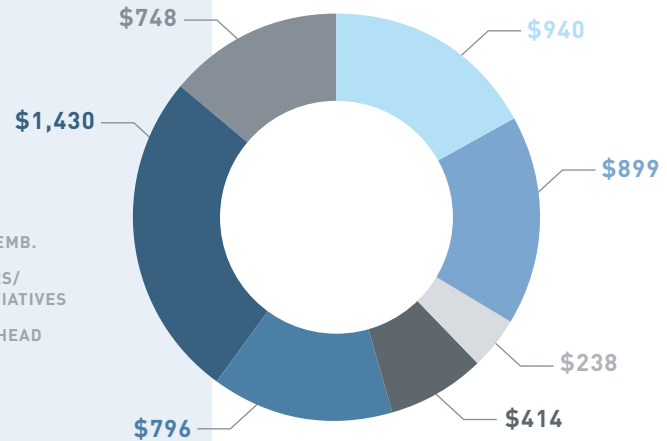
*Special programs include voluntarily funded strategic initiatives work

PROGRAM COST - \$5.47M

offset by \$630,000 in cross charges

TOTAL COST \$'000

- PUBLIC AFFAIRS
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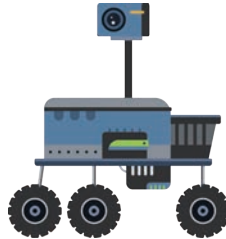
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