



2020

ANNUAL REPORT

The
Aluminum
Association 

ALUMINUM IS ESSENTIAL

2020 was a challenging year. From the ongoing COVID-19 pandemic to a tenuous economic recovery, the aluminum industry – like many industries – is operating in a moment of uncertainty. But one thing is certain – aluminum is essential. From building material to packaging to transportation to critical infrastructure, it is clearer than ever the vital role that aluminum producers play in supporting modern life. And that’s something we should all take pride in.

Despite the unexpected challenges of 2020, the Aluminum Association managed to complete most of its 2020 action plan and take on additional programs to help members through the challenges of COVID. You’ll learn in these pages about some of our key accomplishments for the year. We launched a comprehensive sustainability initiative to better highlight the many advantages of aluminum and aluminum

products. We released vital research including the *2020 Aluminum Design Manual* and *Aluminum Container Design Guide*. We pursued strong trade enforcement, launching new antidumping cases in key markets, which have achieved early success. We executed two virtual all-member meetings and launched an ongoing webinar series and other online educational events. And we continued to execute on goals laid out in our policy framework the Aluminum Agenda, including successfully lobbying for the creation of the first-ever Aluminum Import Monitoring System in the United States.

The association also managed to maintain a strong membership base during a time when many groups are being forced to scale back.

The industry accomplished all of this while welcoming a dynamic leader into the association with Tom Dobbins as our new president & CEO.

Tom joined us from the composites industry and has already put his stamp on the association – realigning staff into three new departments: External Affairs and Industry Relations; Government Relations and International Programs; and Market Growth and Development, to bring even sharper focus to these three vital workstreams.

Looking ahead, the political winds in Washington are changing. The association is already working with the new administration and Congress to highlight the essential role that the U.S. aluminum industry plays in the manufacturing economy. With your continued support, the Aluminum Association will stay ahead of the curve and continue to execute on your behalf.



Marco Palmieri
Senior Vice President &
Chief Integration Officer
Novelis, Inc.
Aluminum Association
Chair



Tom Dobbins
President & CEO
The Aluminum
Association

THE VISION

The Aluminum Association promotes the production and use of aluminum as the sustainable material of choice.

THE MISSION

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.

166,000

direct jobs supported
in USA

\$3B+

invested since 2013

394

plants in USA

39

states with aluminum
presence

560

registered wrought
alloys

22

registered additive
manufacturing alloys

52

members of the
Congressional
Aluminum Caucus

\$60,000

raised for
AluminumPAC

120

association member
companies

38k+

Total followers across
all digital (15% increase)

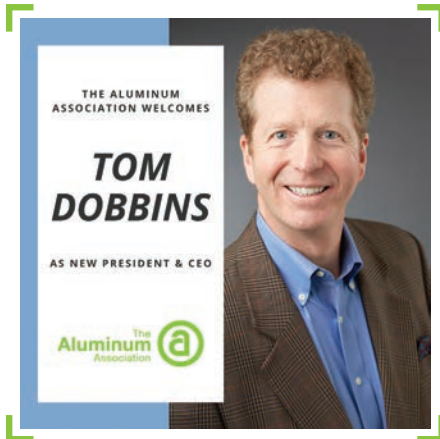
300+

statistical reports
per year

240

meeting registrations
(despite going virtual)

EXTERNAL AFFAIRS & INDUSTRY RELATIONS



ALUMINUM ASSOCIATION WELCOMES TOM DOBBINS AS NEW PRESIDENT & CEO

Tom Dobbins joined the Aluminum Association as president & CEO in March after spending 13 years as the head of the American Composites Manufacturers Association (ACMA). In his new role, Tom serves as the chief advocate for the full aluminum value chain in the United States, which supports nearly 660,000 American workers. “Tom’s extensive experience in public policy advocacy and association management make him a perfect fit to help move the aluminum industry forward during this critical time,” said Marco Palmieri, senior vice president and chief integration officer of Novelis, Inc. and chair of the Aluminum Association. Tom is a recent member of the board of directors of the National Association of Manufacturers (NAM) Council of Manufacturing Associations (CMA). He is also a past chair of American Society of Association Executives (ASAE) Public Policy Committee and Lobby Task Force.

ASSOCIATION SUPPORTS INDUSTRY THROUGH COVID-19 PANDEMIC

The COVID-19 pandemic has upended every aspect of regular life in the United States and around the world – forcing individuals and companies to adjust to continue to operate while keeping employees and communities safe. For its part, the Aluminum Association quickly created a COVID-19 resources page, covering various topics ranging from public health and small business resources to federal and state information. Both the spring and annual meetings for 2020 went virtual, and staff developed a weekly webinar series in the spring to help further share vital information and answer questions. Leveraging the power of the statistics department, the association surveyed the industry to determine the pandemic’s impact on business operations. The Aluminum Association continues to work tirelessly to keep members and the broader industry informed on this continuing public health crisis.



The Aluminum Association pursued a number of efforts, including an online grassroots campaign to designate aluminum production as an essential industry during COVID-19 shutdowns.

NEW WEBINAR SERIES LAUNCHES — THE ALUMINUM BRIEF

2020 underscored the importance of access to timely, accurate and expert information. The Aluminum Association held weekly webinars focusing on COVID-19 updates for several months, and following their success, developed and launched a new monthly webinar series — The Aluminum Brief. The series highlights issues ranging from markets and the economy, policy and politics, sustainability and the environment, health and safety, and everything in between. The Aluminum Association’s goal is to ensure our members have all the information they need to continue to operate and compete in a dynamic marketplace.

ASSOCIATION HIGHLIGHTS SUSTAINABILITY IN ACTION

The entire aluminum industry value chain is continually innovating to make good products great and great products even better. Throughout 2020, we highlighted member company sustainability efforts in our weekly newsletter, Aluminum Week, and on social media. The association also further populated the “Sustainability in Action” landing page on its website with member company sustainability reports and priorities. The U.S. aluminum industry has an incredible sustainability story to tell – and your association is helping tell it.



The virtual lobby for the association’s 2020 annual member meeting.

ALUMINUM ASSOCIATION GOES VIRTUAL

To keep Aluminum Association members and staff safe and healthy during a public health crisis, the association went virtual for both the spring and annual meeting. The pivot was a big change for the association, which has met in person for 85 years. However, the meeting content was as strong as ever thanks in large part to member engagement. We were pleased to maintain strong registration numbers in the virtual environment and take advantage of the new format to spread the meeting out over a week to provide more general sessions than before, providing market intelligence and insight for all of our major market segments. While we all missed the opportunity to convene the membership in person, we are grateful the industry was able to continue its important work at these meetings despite the unexpected challenges of 2020.

ALUMINUM ASSOCIATION TAKES ACTION IN COMMON ALLOY ALUMINUM SHEET, ALUMINUM FOIL MARKETS

Trade enforcement was a key priority again this year — with the Aluminum Association launching antidumping and countervailing duty (AD/CVD) cases in both the common alloy aluminum sheet and aluminum foil markets. In March and September, the association filed petitions charging that unfairly dumped aluminum and aluminum products from a number of countries is causing material injury to the domestic industry. The U.S. Department of Commerce has previously published AD/CVD orders for both markets on imports from China, which has prompted producers to shift exports to other foreign markets. In both cases, this has resulted in producers in those countries exporting their own production to the United States, the only market in the world where market conditions are not distorted by large volumes of low-priced imports from China.

“JW Aluminum applauds the Aluminum Associations relentless focus on addressing unfair trade actions which was critical in JW’s decision to invest over \$200 million in our capacity expansion thereby supporting both American jobs and the building and construction market.”

Lee McCarter, Executive Chairman, JW Aluminum

NEW STUDY SHOWS U.S. ALUMINUM INDUSTRY EMPLOYMENT, ECONOMIC IMPACT

The Aluminum Association released a new study in 2020 that shows that the U.S. aluminum industry directly employs more than 166,000 workers and generates more than \$70 billion in direct economic output — and 660,000 jobs and \$172 billion in total output. Overall employment in U.S. aluminum has held largely steady for most of the past decade, though most sectors saw some declines between 2018 and 2020. This report reflects an industry that has proven resilient despite numerous global trade and other challenges in recent years. Like all segments of the economy, aluminum companies in the U.S. continue to grapple with the ongoing economic disruption caused by the COVID-19 pandemic, which is having a serious impact on demand and jobs. While the initial economic impact report was completed in March of 2020, subsequent modeling shows the impact of COVID-19 on industry jobs and economic output.



The Aluminum Association released its biennial industry economic impact study in 2020.



U.S. Aluminum Industry Direct Jobs by Sector						
	2013	2016	2018	2020	% Change 2018-2020	% Change 2013-2020
Primary/Alumina	12,787	4,879	3,131	4,829	54.2%	-62.2%
Secondary (Recycling)	9,428	9,507	9,412	8,691	-7.7%	-7.8%
Sheet/Plate/Extrusion	61,806	62,327	63,757	62,883	-1.4%	1.7%
Foundries	45,234	50,867	51,364	50,551	-1.6%	11.8%
Forgings	10,328	10,462	10,888	10,464	-3.9%	1.3%
Coatings	2,814	3,132	2,838	2,664	-6.1%	-5.3%
Metal Service Centers	23,142	24,631	26,563	26,146	-1.6%	13.0%
Total	165,539	165,804	167,953	166,228	-1.0%	0.4%

Learn more at aluminum.org/economy

GOVERNMENT RELATIONS

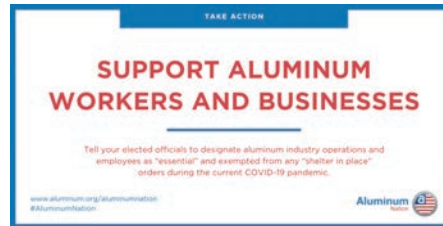
ASSOCIATION SECURES FIRST-EVER U.S. ALUMINUM IMPORT MONITORING SYSTEM

Long a top policy goal of the Aluminum Association, the Commerce Department launched a formal aluminum import monitoring system in 2020, a first for the U.S. government. Import monitoring is a vital component of any effective global trade enforcement program – providing government officials and the industry the tools to better identify trends in trade flows and address aluminum misclassification, transshipment and evasion of duties. In 2021, the association will work closely with the Commerce Department’s International Trade Administration to ensure that the final system supports the fair and open trade of aluminum between the U.S. and other nations.



ALUMINUM DEEMED ESSENTIAL AMID COVID-19 PANDEMIC

As the COVID-19 pandemic led to massive economic disruptions and shutdowns in March, the Aluminum Association quickly sprang into action to ensure the industry’s continued ability to operate. The association launched a grassroots and public affairs effort to ensure that aluminum production and recycling were designated as ‘essential’ activities by the Department of Homeland Security. A white paper, *American Aluminum Jobs: Essential to the Nation* highlighted how the metal supports vital products and services from



consumer packaging to health system infrastructure to medical devices. Most state governments followed federal guidance, enabling the industry to remain largely operational (with appropriate safety measures in place) throughout the year.



“The Aluminum Association keeps our team apprised of all factors impacting the aluminum market — which is especially helpful in times of rapid change.”

Craig Cappel, President, Reynolds Cooking and Foil Business, Reynolds Consumer Products

THE RIGHT DESIGN FOR CONTAINER DEPOSIT PROGRAMS

The Aluminum Association worked with its partners at the Can Manufacturers Institute (CMI) to develop a policy framework endorsing well-designed container deposit programs. We announced the new position in the pages of leading recycling journal *Resource Recycling*, noting that while states with deposit programs “consume about a quarter of all beverage cans, they generate more than a third of all cans recycled.” Later in the year, the association and CMI joined other beverage packaging groups in calling for the reintroduction of container deposit programs during the COVID-19 pandemic to keep a vital source of scrap material flowing.



What to Do With Beverage Containers in Deposit States During Coronavirus

The Aluminum Association worked with industry partners to ensure the continued flow of scrap material during the COVID-19 pandemic.



FINAL SAFE RULE REAFFIRMS SAFETY AND EFFICIENCY OF ALUMINUM

In the spring, the Department of Transportation and the Environmental Protection Agency released the final version of its Safer Affordable Fuel-Efficient (SAFE) vehicles rule for model year 2021 – 2026. The agencies called for year-over-year stringency increases and recognized the safety and importance of vehicle lightweighting in achieving fleetwide fuel economy gains. The Aluminum Association’s Aluminum Transportation Group has been a leading voice in the vehicle fuel economy debate, highlighting the critical role that lightweight materials like aluminum play in helping automakers achieve ever higher standards.

ASSOCIATION ADVOCATES FOR NEEDED REFORMS TO SECTION 232 EXCLUSION PROGRAM

The Aluminum Association continued to highlight ongoing challenges created by the Section 232 tariff product exclusion process for aluminum. The 232 program, which was intended to support U.S. aluminum firms, has instead allowed significant gamesmanship in the market – encouraging imports from metal buyers receiving massive volumes of tariff exclusions, well beyond any conceivable market need. The association’s CEO Tom Dobbins penned an op-ed in *Roll Call* on the need for reform and *The Wall Street Journal* covered the story in detail. After a push from the association, the Commerce Department implemented a number of changes to the program that we advocated – though continued improvements are needed.

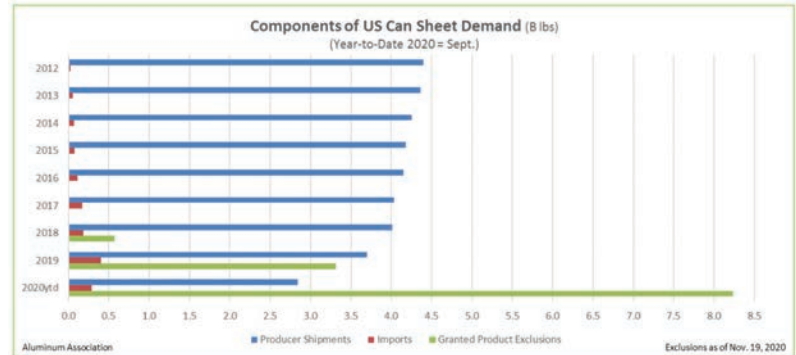
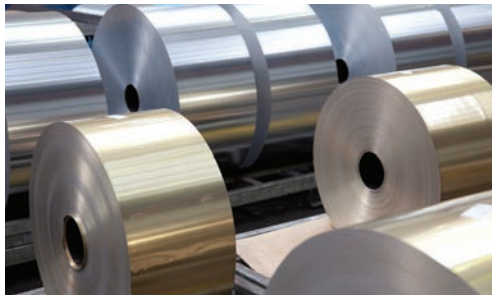
Bloomberg: Aluminum Group Presses for ‘Significant’ Tariff Reforms

Buyers have secured tariff exemptions for more of the metal than they import; ‘the exclusion process has gotten out of control’



PHOTO: CONSTELLIUM

Roll Call: Want to help essential U.S. manufacturing? Reform the aluminum tariff program



Aluminum users were granted massive Section 232 import exclusion requests, far exceeding any rational market need.

ALUMINUM TRADE IN NORTH AMERICA REMAINS FREE, FAIR AND OPEN

Following an intense debate over the spring and summer, the Trump administration again affirmed the tariff-free trade of aluminum between the U.S. and Canada. As economic disruptions this spring led to changes in product mix and trade flows, some market participants advocated the reinstatement of Section 232 tariffs on Canadian aluminum imports. The association served as the tip of the spear for the domestic industry, implementing a full-court-press public affairs campaign advocating for continued open trade in the North America region. This included a public letter by more than a dozen aluminum industry CEOs. Following a brief reimplement of tariffs in August, the administration reinstated Canada's exemption – a boon to U.S. workers and companies which rely on a steady supply of metal from Canada.



“In 2020, the Aluminum Association played a key role in driving fair trade in North America and providing vital resources to support the aluminum industry in navigating through the pandemic.”

Tim Reyes, Executive Vice President and Chief Commercial Officer, Alcoa



More than a dozen aluminum industry CEOs signed a letter to the USTR opposing a push to re-implement Section 232 tariffs on aluminum imports from Canada.

MARKET GROWTH & DEVELOPMENT



ALUMINUM CAN REMAINS MOST SUSTAINABLE PACKAGE ON A NUMBER OF KEY PERFORMANCE METRICS

The Aluminum Association and the Can Manufacturers Institute (CMI) released an updated report — *The Aluminum Can Advantage: Sustainability Key Performance Indicators 2020* — demonstrating the ongoing sustainability advantages of the aluminum beverage container compared to competing packaging types. The report found that consumers recycle aluminum cans at nearly double the rate of plastic bottles. Additionally, aluminum can scrap is far more valuable than glass or plastic, making aluminum a key driver of the financial viability of the recycling system in the United States. While the aluminum beverage can is by far the most recycled and recyclable beverage container on the market today, more can be done to increase can recycling in the United States. In 2019, 50 billion cans – more than \$810 million worth of aluminum – ended up in a landfill, a major loss to the economy and the environment. The U.S. aluminum industry is committed to growing can recycling. The association and CMI also compiled the ongoing work to improve recycling rates in a new paper, *Every Can Counts: An Aluminum Beverage Can Recycling Manifesto*.

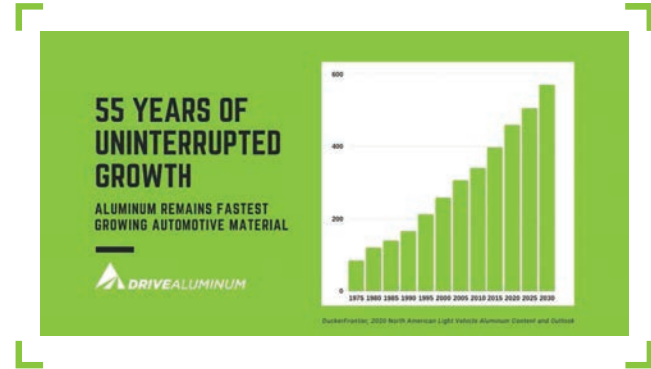


“In these ever-changing times, the Aluminum Association and staff have continued to be a go-to source for accurate, timely and reliable information. They do a great job”

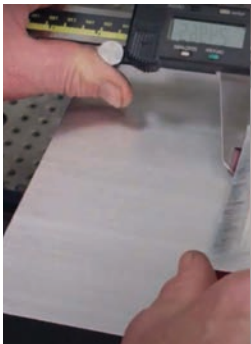
Terrance Hogan, President & CEO, Real Alloy


AUTOMOTIVE ALUMINUM GROWTH ABOUNDS—NEW DUCKERFRONTIER SURVEY OF AUTOMAKERS

The 2020 DuckerFrontier survey of North American automakers and suppliers found that aluminum's content penetration and outlook will continue its positive growth trajectory in the coming decade. Once again, the report names aluminum the fastest growing automotive material, which will continue to drive investments and domestic manufacturing jobs. This new study also confirms that aluminum is a key enabler for an era of electrification, with demand for aluminum extrusions and high-pressure aluminum diecast parts expected to grow due to increased use in applications like battery housings, motor housings and body structural components. Overall, aluminum's future outlook for the automotive market is strong and steady, with the average content levels projected to increase 12 percent by 2026. To capture these opportunities, the association has launched an update to its strategic road map for growing aluminum on the automotive platform. In an ever-changing automotive industry, one thing remains certain: aluminum builds a strong, sustainable, high-performing vehicle. Visit DriveAluminum.org to read the full report.



VIDEO SERIES EDUCATES ON ALUMINUM EXTRUSION TOLERANCES



The Aluminum Association 

Understanding Aluminum Extrusion Tolerances

—

Metal and Space Dimensions for Hollow Profiles

Through its Technical Committee on Product Standards (TCPS), the Aluminum Association developed a new video series showcasing how to properly measure aluminum extrusion tolerances to industry standards. The videos are available on the association's YouTube channel. The series contains five videos, each focusing on a different tolerance measurement – twist, straightness, flatness, solid profiles and hollow profiles. The videos walk through essential measuring tools, procedures, reference table interpretations and calculations to properly measure an extrusion based on association-maintained American National Standards Institute (ANSI) Standard H35.2, which is also found in Aluminum Standards and Data. A special thanks to member company Hydro for allowing us to film (pre-pandemic) at their Cressona, PA, plant.

ALUMINUM CONTAINER DESIGN GUIDE OUTLINES FOUR KEYS TO CIRCULAR RECYCLING

As demand grows for aluminum cans in the United States and around the world, the Aluminum Association this year released a new paper, *Four Keys to Circular Recycling: An Aluminum Container Design Guide*. The guide lays out how beverage companies and container designers can best utilize aluminum in its product packaging. Smart design of aluminum containers begins with an understanding of how contamination – particularly plastic contamination – in the aluminum recycling stream can negatively impact aluminum recycling and even create operational and safety issues. The guide concludes with four keys for container designers to consider when working with aluminum: Key #1 – Use Aluminum; Key #2 – Make Plastic Removable; Key #3 – Avoid the Addition of Non-Aluminum Design Elements Whenever Possible; and Key #4 – Consider Alternative Technologies. We hope this new guide will increase understanding throughout the beverage packaging supply chain about the challenges of contaminated recycling streams and provide some principles for designers to consider when working with aluminum.

THE NON-COMBUSTIBILITY OF ALUMINUM

Aluminum alloys are some of the most widely used materials in industry, prized for their versatility in a wide variety of applications. Unfortunately, aluminum has an undeserved reputation for being an inherently combustible material. This misconception stems largely from rushed analyses of fires where aluminum was present, despite the presence of other materials with proven flammability. The association commissioned a series of tests following standards set forth by both ASTM International and the National Fire Protection Association (NFPA) to provide additional scientific data proving that solid bulk aluminum does not burn to help combat the broader misconception. The association’s standards department took a technical deep dive on this issue in an article for the *Building Safety Journal*, noting that “aluminum, just like many comparable metals, is not combustible in any general application other than when it is specifically made to be.” The piece goes on to say that false perceptions on aluminum’s combustibility are because “scientifically backed information is often slower to propagate in the public sphere.”

Keys to Designing Recyclable Aluminum Containers

Key #1 – Use Aluminum



Key #2 – Make Plastic Removable



Key #3 – Avoid the Addition of Non-Aluminum Design Elements



Key #4 – Consider Alternative Technologies



ASSOCIATION ADDRESSES BIAS IN STEEL INDUSTRY CLAIMS ABOUT AUTOMOTIVE ALUMINUM

The future of transportation and mobility demands high-performing and highly efficient vehicles as the United States and the rest of the world strive for a more sustainable future. This can only be achieved through valid and credible industry research to inform business decisions and help automakers build environmentally friendly vehicles today and tomorrow. The Aluminum Association, as the leading voice for the U.S. aluminum industry, took a critical look at the quantitative environmental assessment method of life cycle assessment (LCA) in an article featured in *Light Metal Age*. In this article, third-party data validates aluminum's overall LCA superiority to competing materials when making a like-for-like comparison.



ALUMINUM ASSOCIATION RELEASES 2020 EDITION OF ALUMINUM DESIGN MANUAL

The Aluminum Design Manual, is an invaluable resource to understand designing and building structures out of aluminum. For the first time ever, the new edition includes a separate Excel spreadsheet containing section property tables for common aluminum shapes making the data more accessible than ever before. Other changes included updates to the Specifications for Aluminum Structures and the addition of a Code of Standard Practice. This cornerstone publication is referenced in the International Building Code as the compliance source for building with aluminum and is available for purchase on the Aluminum Association's online bookstore.

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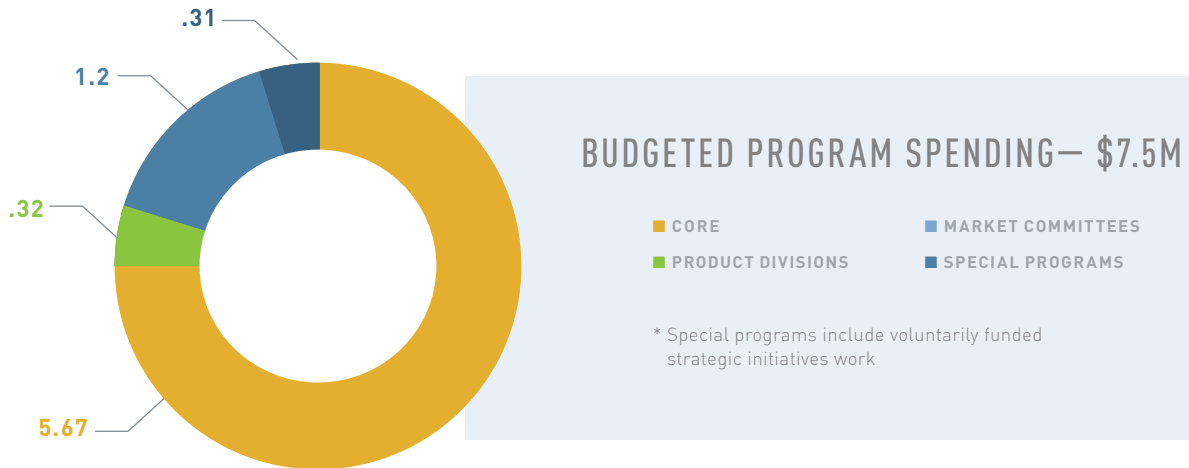
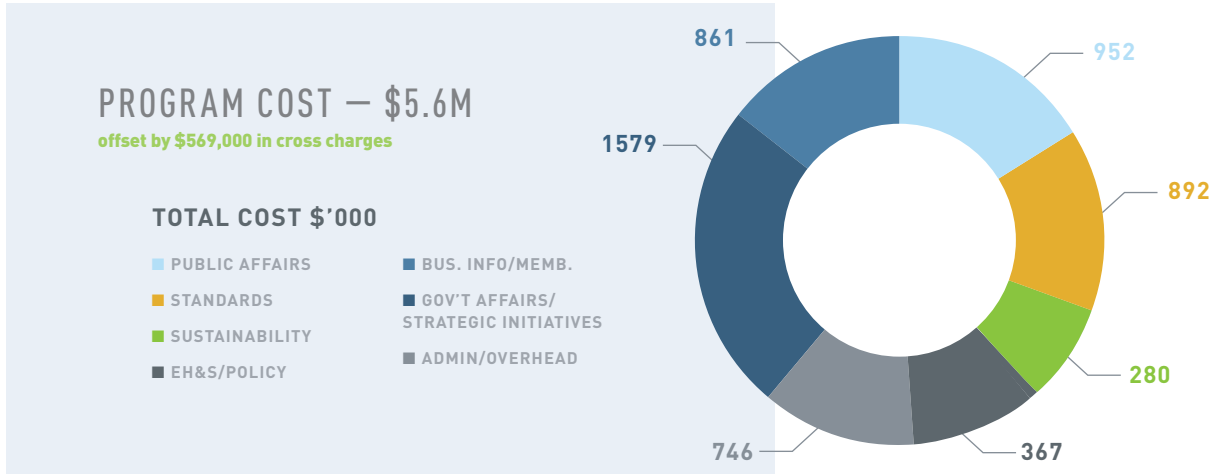
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We would like to thank those who generously contributed to the Aluminum PAC in 2020.

Your financial support will greatly help us advance the interests of the domestic aluminum industry.

