



20 22

ANNUAL
REPORT

The
Aluminum
Association 





Michigan Governor Gretchen Whitmer visited the site of Hydro's new recycling plant in Cassopolis.



Senator Bill Hagerty (R-TN) made a stop at Arconic Tennessee Operations during his Economic Development Tour through East Tennessee, meeting with plant leaders and employees, including members of members of United Steelworkers 309.



Aluminum Association CEO Chuck Johnson joined Novelis and community leaders at the groundbreaking of a new greenfield rolling mill in Bay Minette, Alabama.



The association's Aluminum Transportation Group (ATG) technical committee hosted a design seminar for automotive engineers at Munro & Associates outside Detroit, Michigan.

Letter from the CEO

Last year was a historic one for the U.S. aluminum industry. Indeed, aluminum firms announced more domestic capital investments in 2022 than in the past several decades combined. Companies committed billions to build new aluminum rolling and recycling capacity, including multiple greenfield aluminum plants right here in the United States.

Against a backdrop of near-historic demand and investment, we helped position our industry as uncertainty unfolded in 2022. We worked closely with the U.S. administration as a historic global security event unfolded, provided certainty to our members and vital intelligence to our government, and maintained relatively favorable business conditions for the U.S. market. And we ended the year with nearly 5% demand growth, well ahead of GDP.

Thanks to the leadership and support of our membership, the Aluminum Association tackled some big challenges, chalked up some major wins and set the table for an even better 2023.

Last year, the Board of Directors asked the association to focus on three key areas:

1. **Sharpen and better define our sustainability work.**
2. **Create more opportunities to advance market development.**
3. **Grow and further develop the Aluminum Association team.**

I'm pleased to report that we successfully executed all three of these goals in addition to many other major accomplishments, which you will read about in this annual report. Among our key accomplishments last year, the Aluminum Association:

- Built new functions within the association, including a dedicated member services director and a cross-department sustainability team.
- Advanced the Aluminum Agenda policy pillars, including capitalizing on historic infrastructure spending and securing tens of millions of ROI for our policy work.
- Amplified unprecedented industry investment while supporting policy communications efforts and hosting member media training opportunities.
- Launched business planning and charter development across our committees to better serve key markets.
- Recalibrated membership activities for the post-COVID reality and saw record attendance at meetings.
- Updated key research to help tell the industry's strong sustainability story.

We are already executing on several key milestones and activities in 2023 including our North American decarbonization roadmap.

We appreciate your continued support of the Aluminum Association and look forward to more great things this year.



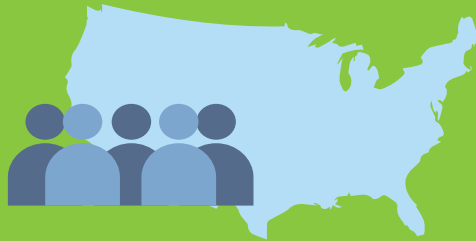
Charles Johnson
President & CEO
The Aluminum Association

A handwritten signature in black ink that reads "Chuck". The signature is written in a cursive, slightly slanted style.

2022 by the numbers

634,000+

jobs supported by the
U.S. aluminum industry



125+

member companies

410

facilities in the USA

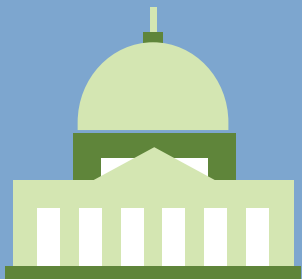


\$9B+

invested by member
companies since 2013

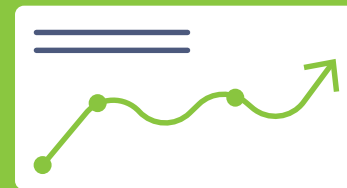


52 members of
Congressional
Aluminum Caucus



40

states & territories with
aluminum footprint



300+

statistical reports



\$64,500

raised for Aluminum PAC

record
year

251

meeting registrations



Choose Aluminum for a Sustainable Future

ASSOCIATION ADVOCACY SHOWS RECYCLING REFUNDS WORK

Working in close collaboration with the Can Manufacturers Institute and other groups, the Aluminum Association launched a robust, nationwide advocacy campaign recommending new recycling refund (or deposit return) programs at the state and federal level. The coalition released national public opinion polling showing strong, bipartisan support for such programs – which create jobs and help bring more recycled materials back into the manufacturing stream.



Scan to learn more

Recycling Refunds

Why Consumers Need More Recycling Refund Programs




UPDATED ENVIRONMENTAL “NUTRITION LABELS” SHOW ENVIRONMENTAL IMPACT IMPROVEMENTS

In October, the Aluminum Association released updated Environmental Product Declarations (EPDs) across all aluminum product types, including primary aluminum ingot, recycled aluminum ingot, aluminum extrusion products and aluminum sheet products. These updated EPDs enable aluminum end users in the building and construction industry to make better informed decisions about using the metal. When used in buildings, aluminum supports innovative designs that optimize building energy efficiency. EPDs are another example of the industry’s commitment to sustainability and telling this story to customers.

ASSOCIATION GROWS CORE SUSTAINABILITY TEAM

The Aluminum Association has long prioritized sustainability work, and in 2022 ramped up staffing efforts to create a cross-functional core sustainability team. Nadya Ally joined the team in August in the newly created role of sustainability director. Nadya develops and oversees the association's overall sustainability strategy. Curt Wells moved into a new position as senior director of regulatory affairs & corporate stewardship, and Marshall Wang was promoted to senior manager, sustainability programs. With these changes, the association has significantly increased its ability to address sustainability issues across markets.



The carbon footprint of North American aluminum production has declined by more than half since 1991.

NORTH AMERICAN ALUMINUM PRODUCTION CARBON FOOTPRINT DROPS MORE THAN HALF SINCE 1991

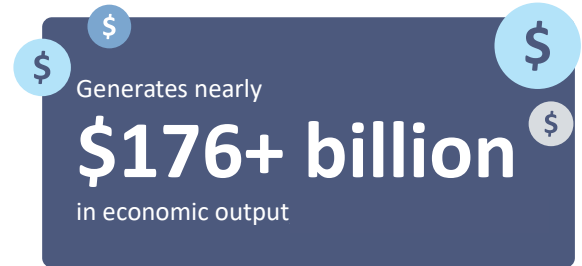
A third-party critical-reviewed life cycle assessment (LCA) report released in January 2022 shows that the energy and carbon impact of aluminum production in North America has dropped to its lowest point in history. Since 1991, the carbon footprint of primary aluminum production declined by 49% while the footprint of recycled aluminum production dropped by 60%. According to the report, aluminum produced in North America, which relies heavily on renewable hydropower, is among the cleanest in the world. The U.S. aluminum industry continues to innovate and find ways to produce this essential metal as sustainably as possible.



Amplifying the Industry's Message

REPORT SHOWS U.S. ALUMINUM JOBS & ECONOMIC IMPACT STEADY THROUGH COVID-19 PANDEMIC

The Aluminum Association released an update to its biennial economic impact survey in 2022 that shows the U.S. aluminum industry directly employs more than 164,000 workers and drives \$73 billion in direct economic output. Overall employment in the domestic aluminum industry has held largely steady for most of the past decade. Significant drops in the aluminum smelting sector have been mostly offset through growth in aluminum recycling and fabrication. In total, the U.S. aluminum industry supports more than 634,000 direct, indirect and induced jobs and nearly \$176 billion in economic output.



ASSOCIATION EVENTS BRING INDUSTRY TOGETHER

The Aluminum Association had a full events calendar in 2022, covering topics ranging from safety to design to policy. The association leveraged virtual tools to host the Aluminum Transportation Group's (ATG) spring design workshop and members-only briefings. Meanwhile, the association's spring and annual meetings set record member attendance after two years of virtual and hybrid conferences, and our Casthouse Safety Workshop sold out for a second consecutive year. Whether in person or online, the association will continue to bring our membership together to discuss the most pressing items impacting the industry.

ASSOCIATION MEMBERS STRENGTHEN THEIR MESSAGE

Over the summer, the Aluminum Association hosted its officers and several member company representatives for an inaugural media and message training session. Whether speaking to policymakers, reporters or employees, understanding how to effectively deliver a message is key to successfully making your case and driving change. Given positive feedback, the association expects to host similar trainings in the future to continue to strengthen the industry's message and messengers.



Scan to read more:

The Wall Street Journal
**Aluminum Makers Seek Old Cans,
Shredded Cars to Fuel New Plants**

“To meet rising demand, aluminum companies are doubling down on recycling, melting more scrap to increase their output of aluminum.”

TAKING THE LEAD ON SUSTAINABLE MANUFACTURING GROWTH

During a year of unprecedented investment and tectonic shifts in the market toward ever-more sustainable production, the Aluminum Association worked with the membership to ensure that the aluminum industry's story remained front and center. To cite one example, in the spring, *The Wall Street Journal* ran an extensive feature story highlighting how increased recycling will help meet growing aluminum demand and fuel continued manufacturing investment in the United States.



Rosa Laxamana from Granges moderated a panel discussion on Environment, Social and Governance (ESG) featuring Aluminium Stewardship Initiative's (ASI) Dr. Fiona Solomon, Boeing's Gwennan Hollingworth and Rocky Mountain Institute's Estefanía Marchán.



BakerHostetler's Lee Simowitz received the Marlan T. Boultinghouse award for service to the aluminum industry.



John Fitzpatrick from the association's long-term PR firm Stratacomm received the Chariman's Award for service on behalf of the aluminum industry.



AMCOR's Erin Fauber spoke during a meeting of the Executive Committee and Associate Member Committee in Colorado Springs.

DIGITAL PRESENCE AMPLIFIES INDUSTRY'S VOICE

The Aluminum Association is the industry's leading voice -- and this voice is made even stronger when member companies repurpose association content to amplify industry messaging. Member communications toolkits accompany several key work products and make it easy for companies to share ready-made content on everything from the industry's sustainability advances to economic impact and market penetration. In 2022, we saw increased online engagement – particularly leveraging and resharing association content and news – from the membership, helping to advance the industry's voice and reach.

Arconic
@arconic

The Recycling Refunds Work microsite is a great resource to learn about the value of [#recycling](#) refunds programs and their impact to increase the number of recycled beverage containers in the U.S.
[#Aluminum](#) [#Sustainability](#) [#GreenAlternative](#)



Recycling Refunds Work
Why consumers need more recycling refund programs

recyclingrefundswork.org
Recycling Refunds Work
Recycling refunds have a proven track record of incentivizing recycling, reducing litter, and providing material for recycled content in new beverage ...

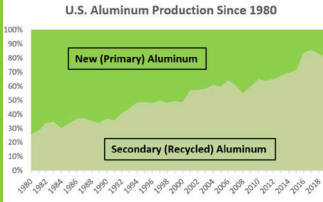
Matalco Inc.
2,760 followers
1yr · 🌐

Aluminum is unique in the sense that it is virtually infinitely recyclable! This means that up to 75% of all aluminum ever produced is still in use today, and that number is only getting higher!

The article below outlines all the ways recycling aluminum is beneficial for the environment, and what the future holds for aluminum recycling. Go give it a read!

[#recycling](#) [#Environment](#) [#Aluminum](#) [#Aluminumrecycling](#)
[#aluminumproduction](#) [#recycle](#) [#sustainability](#)

<https://lnkd.in/gycRSNeH>



U.S. Aluminum Production Since 1980


Year	New (Primary) Aluminum (%)	Secondary (Recycled) Aluminum (%)
1980	~75	~25
1985	~70	~30
1990	~65	~35
1995	~60	~40
2000	~55	~45
2005	~50	~50
2010	~45	~55
2015	~40	~60
2020	~35	~65
2025	~30	~70
2030	~25	~75
2035	~20	~80
2040	~15	~85
2045	~10	~90
2050	~5	~95

Gränges Americas Inc.
3,975 followers
GRANGES 1yr · 🌐

What an exciting week at [The Aluminum Association](#)'s spring meeting. [Bradford R. Thomas](#) and [Jerry Grajzl, P.E.](#) joined so many others in learning how Sustainability is becoming increasingly more important.


"It's really great to see so many discussions around sustainability, it is so important that we positively impact the future." [Rosa Laxamana](#) - Gränges Sustainability Manager

[#industryleader](#) [#begreen](#) [#sustainablebusiness](#) [#recycledmaterials](#) [#sustainability](#)



WHAT DOES ENVIRONMENTAL PROGRESS LOOK LIKE IN THE US ALUMINUM INDUSTRY?

GRANGES



As a lightweight, infinitely recyclable and durable material with a remarkable variety of industrial and consumer applications, aluminum provides an innovative solution to many 21st century challenges.

Alumina

Novelis Inc.
@Novelis

91% of automotive [#aluminum](#) is recycled. We joined [@DriveAluminum](#) & others to identify an even more [#sustainable](#) [#automotive](#) future w/ improved collection rates, increases in recycled content and end of life [#recycling](#). Learn more: bit.ly/3s6SsPa. [#automotiveindustry](#)

Your Voice in Washington D.C.

INFLATION REDUCTION ACT CREATES OPPORTUNITIES FOR ALUMINUM

The Aluminum Association successfully advocated for key components of the Inflation Reduction Act (IRA) in 2022. Notable wins in the legislation include a major new tax credit to incentivize advanced clean energy manufacturing and grants to help fund technology to reduce greenhouse gas emissions at energy intensive facilities. Conservatively, the association's efforts on the IRA have the potential to bring back tens of millions in federal support to drive an ever-more-sustainable U.S. aluminum industry.



Fiona Bell and Tina Kimble of Novelis with Congressional Aluminum Caucus co-chair Congresswoman Haley Stevens (D-MI).

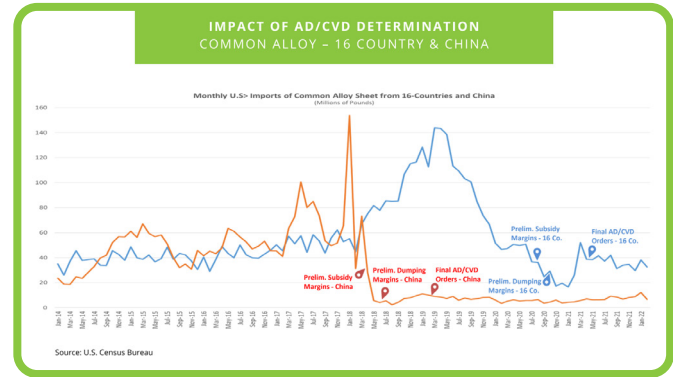


BIPARTISAN CONGRESSIONAL ALUMINUM CAUCUS ACTIVATES FOR INDUSTRY

From hosting industry briefings to coordinating aluminum plant tours, the bipartisan Congressional Aluminum Caucus had an active 2022. Caucus co-chair Rep. Bill Johnson (R-OH) visited Novelis' plant in Uhrichsville, Ohio, and Congresswoman Cathy McMorris Rodgers (R-WA) toured Kaiser Aluminum's Trentwood rolling mill in Spokane, WA. And several member companies joined the association and the Can Manufacturers Institute to brief the Caucus on why recycling is essential to the modern aluminum business. The association and member companies separately briefed the Caucus on trade policies and actions impacting the domestic aluminum industry. We look forward to continuing our work with the Caucus to tell the industry's story and educate policymakers on the critical issues facing aluminum in America.

TARGETED TRADE ENFORCEMENT DRIVES ALUMINUM INVESTMENT

One year after the Commerce Department issued antidumping (AD) and countervailing duty (CVD) orders on imports of certain common alloy sheet imports from 16 countries, the U.S. common alloy aluminum sheet market showed signs of significant recovery. U.S. producer shipments of common alloy sheet increased by nearly 25% between 2020 and 2021 while imports declined by more than half over two years. Meanwhile, investments in the common alloy sheet market included a \$207 million upgrade of JW Aluminum's mill in Mt. Holly, SC, and Arconic's \$100 million investment in its operations in Knoxville, TN. This is another example showing that targeted trade enforcement works.



PLANT TOURS SHOW COMMERCE DEPARTMENT OFFICIALS BENEFITS OF TARGETED TRADE ENFORCEMENT

As part of its ongoing engagement with agencies charged with enforcing aluminum trade remedies, the Aluminum Association worked with members in 2022 to host plant tours and seminars for officials from the Commerce Department, including Commerce Assistant Secretary Lisa Wang, and U.S. International Trade Commission (USITC) staff. The events provided great opportunities for government officials to see the industry in action, ask questions on the production process and see firsthand the positive impact the orders are having on the domestic aluminum industry. A big thank you to Jupiter Aluminum and Arconic for hosting these tours.

Advancing Markets with Business Information

ALUMINUM SHINES AT TRADE SHOWS FOR KEY MARKETS

From supporting increased fuel economy in vehicles and cooling efficiencies in buildings, to creating sustainable infrastructure solutions and the perfect beverage container—aluminum is providing business-smart and environmentally friendly solutions. In 2022, association members and staff presented on aluminum's end use benefits at trade shows for key markets like automotive and building & construction. New for 2022, the Aluminum Transportation Group (ATG) hosted a panel – Transforming Mobility and Electrification Through Collaboration – featuring Lucid Motors and General Motors at the Detroit Auto Show, which featured a variety of high-performing, aluminum-clad vehicles.



STATISTICS PORTAL BRINGS DATA TO LIFE

The Aluminum Association is the primary source for statistics and business information on the North American aluminum industry. Since launching the online statistics portal, the association's team has been hard at work further refining the tool so subscribers can easily access exclusive data on virtually every aspect of aluminum's production and use in the United States and beyond. Modern, interactive data visualization gives subscribers the power to better analyze and present industry business information.



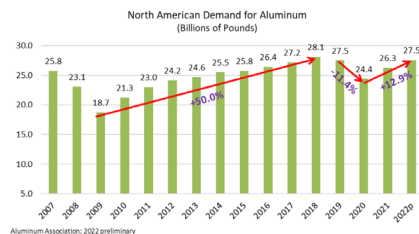
ROADMAP TO GUIDE NEXT DECADE OF AUTO ALUMINUM GROWTH

After more than a year of work, the association completed the Roadmap for Automotive Aluminum, which lays out key research and development (R&D) priorities and technology milestones designed to support customer needs to advance all elements of aluminum production for automotive applications. The Roadmap specifically breaks the priorities into five key buckets: Design Engineering; New Alloys and Products; Future Vehicles; Next-Generation Aluminum Fabrication Technologies; and Recycling and Sustainability. This living, breathing document sets the direction for the Aluminum Transportation Group's (ATG) technical efforts and projects going forward.

QUARTERLY TRENDS SHOW GROWING ALUMINUM DEMAND

As the primary source for statistics and business information on the North American aluminum industry, the association's more than two-dozen different statistical reports help to tell the industry's story in a factual, data-driven way. A new addition in 2022, the association's quarterly demand press releases brought the latest data from the monthly Aluminum Situation report to a broader audience – helping to contextualize the state of the industry for press, policymakers and other stakeholders.

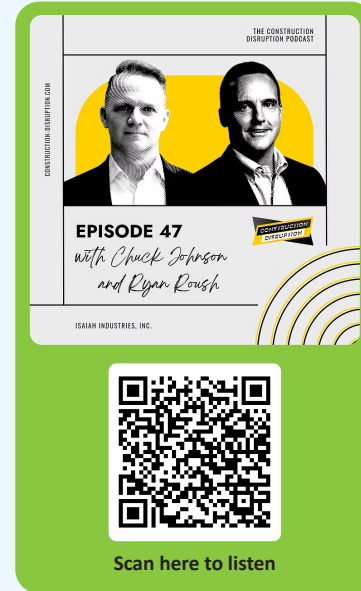
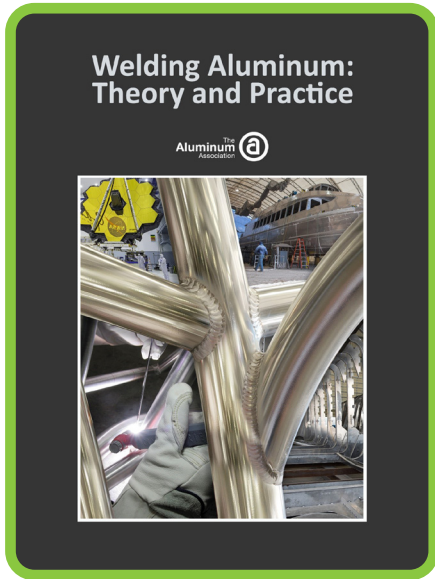
North American Aluminum Demand Up 4.8% in 2022



The association's Statistical and Market Research committee met in South Carolina in May to discuss the industry's business information program.

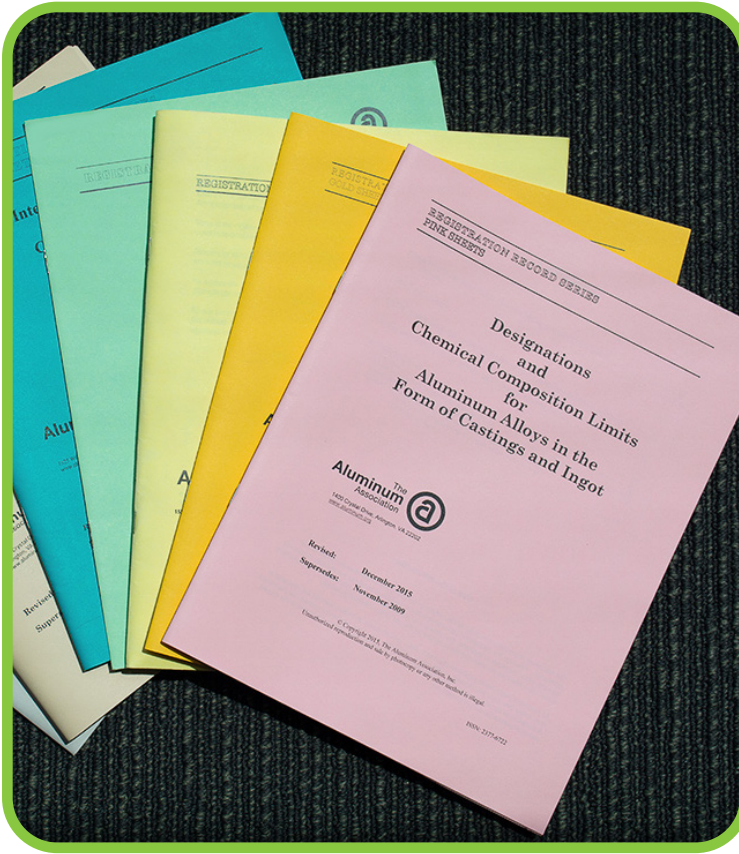
UPDATED WELDING HANDBOOK BRINGS LATEST INFORMATION

The association published the 5th Edition of *Welding Aluminum: Theory & Practice* (WATP), the first update since 2002. Originally published in 1989, WATP is widely regarded as the definitive reference for aluminum welding. This edition includes refreshed tables, graphics and chapters to match the latest information and reflect major advances in aluminum welding technology over the past 20 years. Thank you to the preeminent welding experts and the American Welding Society (AWS) for their contributions to this long-awaited update.



CONSTRUCTION DISRUPTION PODCAST TALKS BUILDING WITH ALUMINUM

The Aluminum Association had a great opportunity to discuss the many benefits of building with aluminum on Isaiah Industries' "Construction Disruption" podcast. In addition to highlighting why builders and architects should choose aluminum, Chuck Johnson from the Aluminum Association and Ryan Roush from JW Aluminum discussed a recent study that projects aluminum usage will grow by 34 - 51% in the residential building and construction market by 2024.



TEAL SHEETS GO DIGITAL

For more than 60 years, the Aluminum Association has worked with the industry to develop and maintain technical standards for aluminum production. And in 2022, the association partnered with Matplus GmbH to launch a digitized version of the widely recognized *International Alloy Designations and Chemical Composition Limits For Wrought Aluminum Alloys* – also called Teal Sheets. The tool is free after registration and expands the reach of this key publication.

ALUMINUM ASSOCIATION PUBLISHES STANDARD FOR ALUMINUM ALLOY POWDERS

The Aluminum Association released the first edition of a new registration series: *Designations and Chemical Composition Limits for Aluminum Powders and Aluminum Alloy Powders*, also known as the Purple Sheets. While aluminum's impressive strength-to-weight ratio, high corrosion resistance and great electrical and thermal conductivity have long been recognized in powder form as friction materials, coatings and powder metallurgy feedstock, it is also the rising star of additive manufacturing – commonly known as 3D printing. The Purple Sheets serve as a foundational step in standard setting to facilitate business between producers, suppliers and users of aluminum powders and powder products.

Meet Team Aluminum

OFFICE OF PRESIDENT & CEO



Charles Johnson
President & CEO



Madeleine Smith
Executive Assistant to
the President & CEO

FINANCE & ADMINISTRATION DEPARTMENT



Jennifer Cassidy
Vice President, Finance &
Administration



Jennifer Bell
Director,
Membership Services



Heidi Lomba
Senior Accounting
Specialist

EXTERNAL AFFAIRS DEPARTMENT



Matt Meenan
Vice President,
External Affairs



Nadya Ally
Director, Sustainability



Katie Rosebrook
Manager,
External Affairs

Meet Team Aluminum

GOVERNMENT RELATIONS DEPARTMENT



Virginia Gum Hamisevicz

Vice President, Government Relations
& International Programs



Curt Wells

Senior Director, Regulatory Affairs &
Corporate Stewardship



Ryan Olsen

Vice President, Market
Growth & Development



Marshall Wang

Senior Manager,
Sustainability Programs



John Newman

Director, Technology &
Market Development



Sam Muhamed

Project Manager,
Standards & Technology



Debra Weston

Senior Technical Assistant



Sydney Masterson

Statistical Analyst

Meet the Leadership

Board of Directors



Buddy Stemple,
Constellium, **Chair**



Henry Gordinier,
Tri-Arrows Aluminum, **Vice Chair**



Sonya Harden,
Alcoa, **Second Vice Chair**

Charlie Murrah, Southwire
Charlie Straface, Hydro
Erin Fauber, AMCOR
Garney Scott III, Scepter, Inc.
Jason Walsh, Kaiser Aluminum
John Lapidès, United Aluminum
Kierstan Fitzgerald, Vesuvius
Lee McCarter, JW Aluminum
Mark Vrabec, Arconic
Matt Hanley, Vail Rubber
Mike Keown, Commonwealth Rolled Products

Mike Otero, Almexa
Murray Rudisill, Reynolds Aluminum
Neeraj Saxena, Messer
Patrick Lawlor, Granges
Paul-Henri Chevalier, Jupiter Aluminum
Terry Hogan, Real Alloy
Tolga Egrilmezer, Rio Tinto
Tom Grosko, Smelter Services
Tom Testwuide, Sr., Skana Aluminum
Trond Gjellesvik, Hydro

Board Committee Leadership

Executive Committee

Henry Gordinier, Tri-Arrows Aluminum

Finance Committee

Tom Grosko, Smelter Service

Legal Audit

John Donnan, Kaiser Aluminum

Membership

Sonya Harden, Alcoa

Nominating

Buddy Stemple, Constellium

Sustainability Advisory Council

Terry Hogan, Real Alloy

Meet the Leadership

Resource and Support Group Leadership

Associate Member

Matt Hanley, Vail Rubber Works

Government & International Affairs

Delphine Dahan-Kocher, Constellium

Statistical & Market Research

Andrew Cordell, Constellium

Environmental

Edgar Scott, Kaiser Aluminum

Health & Safety

Jim Wesdock, Alcoa

Technical Committee on Product Standards

Jerome Fourmann, Rio Tinto

Market Committee Leadership

Aluminum Transportation Group (ATG)

Mike Keown, Commonwealth Rolled Products

Recycling

Travis Carr, Real Alloy

Pigments & Powder

Louise Ramsey Thomas, U.S. Metal Powders

Aluminum Transportation Group Technical Committee

Blake Zuidema, Novelis

Electrical

Christel Hunter, Cerro Wire

Secondary Producer Work Group

Chad Tucker, Scepter

Building & Construction

Laura Lanza, Novelis

Foil

Brad Thomas, Granges

Sheet & Plate

Jason Walsh, Kaiser Aluminum

Can Sheet Producers

Spooner Ward, Novelis

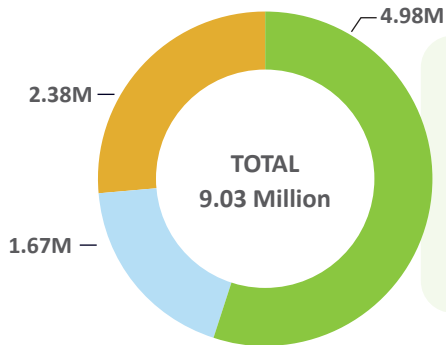
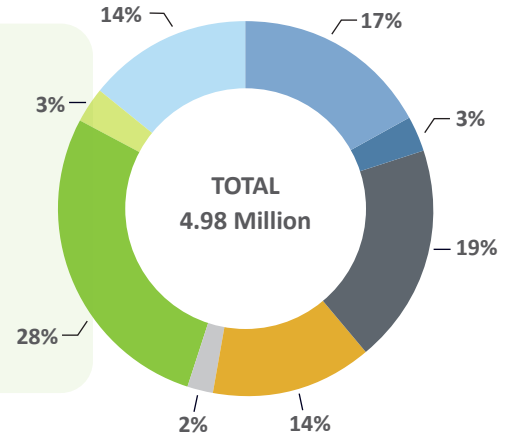
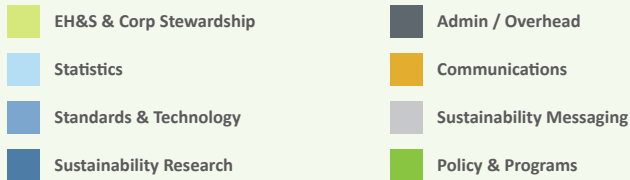
Heavy Truck

Davide Ricci, Novelis

Financial Stewardship

The association's 2022 budget was break even, and we ended the year with a modest surplus of \$200,000.

2022 Core Program Costs



2022 Total Association Spend



Thank You to our Aluminum PAC Donors

As of March 15, 2023



Chair Level

Jean-Marc Germain, Constellium
John Herrmann, Kelley Drye
Charles Johnson, The Aluminum Association
John Lapides, United Aluminum
Garney Scott, Scepter Inc.

Presidential Level

Air Products PAC
Alcoa PAC
Erin Fauber, Amcor
Virginia Gum, The Aluminum Association
Matt Kripke, Kripke Enterprises
Buddy Stemple, Constellium

Congressional Level

Fiona Bell, Novelis
Jennifer Cassidy, The Aluminum Association
Chris Cerone, Novelis
Henry Gordinier, Tri-Arrows Aluminum
Sonya Harden, Alcoa
Terry Hogan, Real Alloy

Matt Meenan, The Aluminum Association
Messer PAC
Duncan Pitchford, Hydro
Edgar Scott, Kaiser Aluminum
Tom Testwuide, Skana Aluminum Company
Mark Vrabec, Arconic
Jason Walsh, Kaiser Aluminum
Curt Wells, The Aluminum Association
John Weritz

Supporter Level

Nadya Ally, The Aluminum Association
Francois Begin, CAM Technologies
Jennifer Bell, The Aluminum Association
Thomas Boney
Travis Carr, Real Alloy
Jim Checkeye, Bloom Engineering
Delphine Dahan-Kocher, Constellium
Subodh Das, PHINIX
Steve Gallimore, Skana Aluminum Company
David Georgiana, Penske Logistics

Tom Grosko, Smelter Services Corp
Matt Hanley, Vail Rubber Works
Mike Hanley, Vail Rubber Works
Dave Hauser, Skana Aluminum
A.J. Johnston, Arconic
Mike Keown, Commonwealth Rolled Products
Tina Kimble, Novelis
Harrison Lapides, United Aluminum
Craig Lewis, Constellium
Josh Morey, Kelley Drye
Peter Nagusky, The Federal Metal Co
Ryan Olsen, The Aluminum Association
Mike Otero, Almexa Aluminio
Murray Rudisill, Reynolds
Neeraj Saxena, Messer
Charlie Straface, Hydro
Lee Simowitz
Daniel Titus, Page Transportation
Chad Tucker, Scepter, Inc.
John Wharton, Gresham Smith
Lauren Wilk, Arconic

The
Aluminum
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