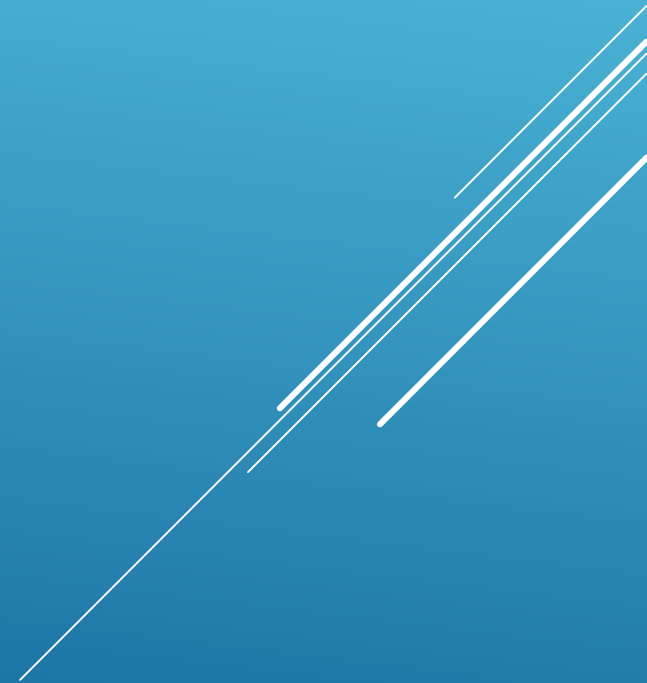




AWWPA
American Wire Producers Association

Member Survey and Interviews



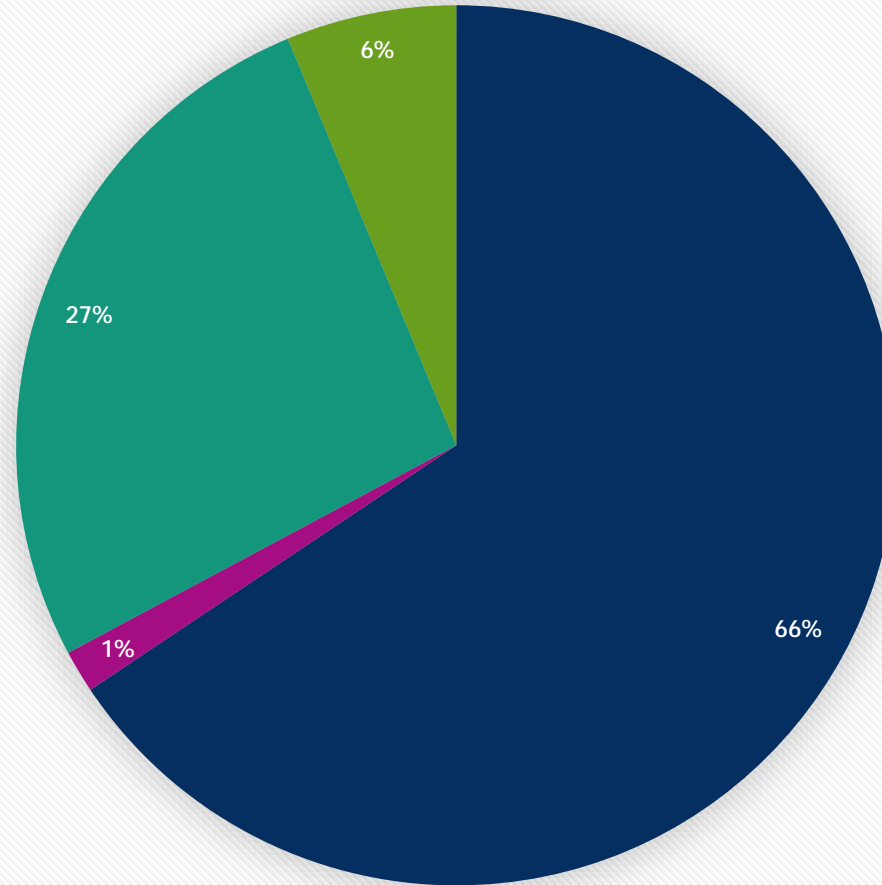
Member Survey Responses

■ US Wire
Manufacturer

■ Associate
Mexican
Manufacturer

■ Associate Rod
Supplier

■ Associate Supplier



SPRING SURVEY OF MEMBER REPRESENTATIVES

<u>Top 5 AWPA Benefits for Active Members</u>	Average Value	
	Active	Associate
Providing Information on Policy, Legislation & Regulation to Members	2.36	2.11
Analysis of Shipments Statistics	2.23	2.33
AWPA Representation of the Industry in DC	2.21	2.33
General Import Data	2.19	2.22
Organization of Advocacy Efforts	2.18	2.11

SPRING SURVEY OF MEMBER REPRESENTATIVES

<u>Top 5 Issues</u>	Average Value	
	Active	Associate
Government Infrastructure Spending	2.39	2.39
Buy America/American	2.33	2.67
Foreign Trade Agreements	2.33	2.44
Regulatory Reform	2.33	2.44
Tax Reform	2.27	2.39

ACTIVE MEMBER INTERVIEWS

42 Active Member Representatives

- 27 Interviews
- 45 Minutes on Average
 - Longest 1.5 hours
 - Shortest 20 minutes

ACTIVE MEMBER INTERVIEWS

Average Age 54, Oldest 66, Youngest 37

TITLES/Responsibilities

16 CEOs/Presidents: 57 Average Age

5 VPs of Operations/

Product Sector: 53 Average Age

5 Directors - Marketing, Sales,

Supply Chain: 43 Average Age

ACTIVE MEMBER INTERVIEWS

Regional Sales – 3 Companies

National Sales – 24 Companies

Production, Sales, Exports to NAFTA

8 Companies

Production, Sales, Exports Other Countries

11 Companies –

Average of 11% of Production Exported

ACTIVE MEMBER INTERVIEWS

Annual Meeting Attendance

1 Person – 7 companies

2 People – 11 companies

3-5 People – 2 companies

None – 3 companies



ACTIVE MEMBER INTERVIEWS

Government Affairs Conference Attendance

1 Person – 13 companies

2 People – 6 companies

3 People – 2 companies

None – 5 companies

Congressional Visits – 35 People Visited 73 Offices

1 Person – 14 companies

2 People – 4 companies

3 People – 1 company

None – 3 companies

ACTIVE MEMBER INTERVIEWS

Political Engagement

HIGHLY Engaged – 15 companies

New or Growing Engagement – 7 companies

No Engagement – 5 companies

Engagement Includes:

Personal Relationships

Plant Tours for Legislators

Local Politics and Development Agencies

ACTIVE MEMBER INTERVIEWS

**Political Issues of Importance – 3 Very Important/Concerned,
2 Important/Concerned, 1 Not Important/Concerning**

2.85 Imports of Company's Wire & Wire Products

2.67 Workforce Development

2.52 Imports of Customer's Wire Products

2.41 Regulatory Reform

2.41 Foreign Trade Agreements

2.22 Infrastructure Investment

2.19 Tax Reform (It was almost passed)

2.11 Buy American

ACTIVE MEMBER INTERVIEWS

Trade Issues

Wire Rod Trade Case

21 Companies Compete Directly with Their Rod Suppliers

Section 232

Global Steel Overcapacity

Subsidies for Foreign Competitors – Particularly China

ACTIVE MEMBER INTERVIEWS

Workforce Development Issues

Attracting Younger Workers to a 20th Century Work – dirty, physical

Aging Workforce No Longer Physically Capable

Millennials:

- Not Interested

- Difficult to Relate to Them

- Can't Retain Them

Low Unemployment

Finding Drug Free Workers, Opiate Epidemic High Where Plants Are

ACTIVE MEMBER INTERVIEWS

WHY BELONG TO AWPA

Leverage the Political Issues/ Advocacy

“Best Downstream ... Industry Advocate”

Good Representation of the Industry

Relationships

Industry Knowledge

Data is Valuable – Benchmarking and Import Data

Commercial Opportunities with Rod Suppliers

Industry Opposition to Wire Rod Cases, Good Information Flow

ACTIVE MEMBER INTERVIEWS

WHY BELONG TO AWPA - Continued

Learning Opportunity for Those New to the Industry - Mentors

Ability to Pick up the Phone and Call a Colleague

Responsibility to the Community/Industry

“ Almost like having another staff member with the information AWPA provides.”

ACTIVE MEMBER INTERVIEWS

WHAT'S KEEPING YOU UP AT NIGHT?

Rod Market/ Availability

Downstream Import Pressures

Workforce Issues – Most Reiterated

Investments and ROI

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ACTIVE MEMBER INTERVIEWS

Social & Business Trends on the Horizon?

Plants of the Future – Automation to Solve Workforce Issues?

IoT In Every Upgrade

ERP Systems, Wireless Warehouse

Industry 4.0

Young People Will Do Business Differently – No-one Their Age in
Sales Force, Social Media

Labor, Communication Styles, Education and Management,
Must Follow New Technology

ACTIVE MEMBER INTERVIEWS

Social & Business Trends on the Horizon?

Mass Transit /Millennials Not Buying Cars /Electric Vehicles

Fewer Cars Manufactured

Less Wire in Electric Vehicles

E-commerce

Business to Business

"Bed in a Box"

Less Formal Society – Fewer Hangers for Dry Cleaners

ACTIVE MEMBER INTERVIEWS

Unlimited Resources?

More Lobbying/ Stronger Voice in DC

Outreach to Other Associations

Other Benchmarking Opportunities

Workforce Training - Wire Making University

Create Data & Market Information – Foreign Markets

Research in New Technologies

Legal Support for Members





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THANK YOU!

