Member Survey and Interviews
Member Survey Responses

- US Wire Manufacturer: 66%
- Associate Mexican Manufacturer: 27%
- Associate Rod Supplier: 6%
- Associate Supplier: 1%
# SPRING SURVEY OF MEMBER REPRESENTATIVES

## Top 5 AWPA Benefits for Active Members

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Active</th>
<th>Associate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providing Information on Policy, Legislation &amp; Regulation to Members</td>
<td>2.36</td>
<td>2.11</td>
</tr>
<tr>
<td>Analysis of Shipments Statistics</td>
<td>2.23</td>
<td>2.33</td>
</tr>
<tr>
<td>AWPA Representation of the Industry in DC</td>
<td>2.21</td>
<td>2.33</td>
</tr>
<tr>
<td>General Import Data</td>
<td>2.19</td>
<td>2.22</td>
</tr>
<tr>
<td>Organization of Advocacy Efforts</td>
<td>2.18</td>
<td>2.11</td>
</tr>
<tr>
<td>Top 5 Issues</td>
<td>Average Value</td>
<td></td>
</tr>
<tr>
<td>------------------------------------------</td>
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<td></td>
</tr>
<tr>
<td>Government Infrastructure Spending</td>
<td>2.39</td>
<td></td>
</tr>
<tr>
<td>Buy America/American</td>
<td>2.33</td>
<td></td>
</tr>
<tr>
<td>Foreign Trade Agreements</td>
<td>2.33</td>
<td></td>
</tr>
<tr>
<td>Regulatory Reform</td>
<td>2.33</td>
<td></td>
</tr>
<tr>
<td>Tax Reform</td>
<td>2.27</td>
<td></td>
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</tbody>
</table>
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
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
THANK YOU!