

NETWORK.



LEARN.



LEAD.

PMA
PRECISION
METALFORMING
ASSOCIATION

2018 ANNUAL REPORT

Dear Members,

Thank you for the warm welcome I received when I joined the PMA team as president in February!

Looking back on PMA's 2018 fiscal year, I first want to thank PMA President Emeritus Bill Gaskin for coming out of retirement from October 2018 through April 2019 to help lead the association during a transition period. His generous service to the association and industry is greatly appreciated.

During this past year, PMA held many signature events that allowed members to build relationships with peers and gain valuable insight into industry trends. Highlights of FY'18 events included the annual Forming Our Future Leadership Conference in San Antonio, One Voice Legislative Conference in Washington, Automotive Parts Suppliers Conference in Detroit, and Metal Stamping and Tool & Die Conference in Nashville. PMA also offered dozens of other conferences, seminars, roundtables and webinars, as well as our popular Management Development Academy, to provide learning opportunities for everyone from entry-level workers to future company presidents.

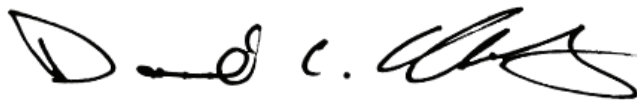
In addition, PMA's continued commitment to being the industry leader in workforce development led to the September 2018 launch of METALFORM EDU—a convenient, low-cost, online training program featuring more than 550 courses, including 37 PMA-exclusive courses developed for the metalforming industry. I'm pleased to report that we also have introduced a Workforce Matters Virtual Learning Series for FY'19 to further assist members in addressing workforce-development challenges, including finding new hires, upskilling talent and onboarding new employees.

Finally, during FY'18, PMA supported networking activities at the local district level; offered expert commentary and informative technical articles in our industry-leading *MetalForming* and *3D Metal Printing* magazines; provided access to the latest technology advancements at the FABTECH tradeshow; and served as the voice of our industry in Washington, D.C. through active involvement in government advocacy. More detailed information about our efforts in these areas can be found throughout this report.

Please feel free to reach out to me or any of the PMA team with feedback on how we can best serve your company's needs.

On behalf of the entire staff, thank you for your investment in PMA. We look forward to working with you in 2019 and beyond!

Cordially,



David C. Klotz
PMA President



David C. Klotz
PMA President

Throughout its more than 75-year history, the Precision Metalforming Association (PMA) has served the needs of those in metalforming companies in keeping with its mission: to shape the environment of the industry, leading innovative member companies toward superior competitiveness and profitability.

PMA by the Numbers:

800

MEMBER COMPANIES

80,000

INDIVIDUAL
MEMBERS

37

STATES

90,566

UNIQUE PMA.ORG
VISITORS

25

COUNTRIES

452,026

PMA.ORG
PAGE VIEWS

19

WEBINARS

57

CONFERENCES,
SEMINARS
AND EVENTS

9

BUSINESS
REPORTS

Primary Markets Served by Members:



23% Automotive Tier 2



15% Commercial/Industrial Hardware



14% Electronics



13% Appliance



11% Consumer



11% Lawn and Garden



11% Medical/Instruments



9% Automotive Aftermarket



9% Automotive Tier 1



8% Aerospace



8% Defense



8% Off-Highway



8% Telecommunications



7% Computer/Business Machines



3% Produce Own End Product

Primary Processes Performed:

Metal Stamping
Metal Spinning

Metal Fabricating
Roll Forming

Slide Forming
Small Lot Stamping

Tool and Die



Network.

SIGNATURE EVENTS

PMA's signature events are powerful programs designed to deepen your skill set, expand your professional network and help transform your business. During FY'18, PMA held five signature events throughout the United States. These events (shown below) put members in front of their government representatives, addressed the changing landscape in the automotive industry and brought together industry titans in San Antonio to look toward the future.

One Voice Legislative Conference

April 16-18, 2018
Washington, D.C.

36 Participants
29 Companies



Automotive Parts Suppliers Conference

April 25-26, 2018
Detroit, MI

151 Participants
105 Companies



Sales and Marketing Summit

September 26-28, 2018
Nashville, TN

54 Participants
47 Companies



Metal Stamping and Tool & Die Conference

January 29-30, 2019
Nashville, TN

157 Participants
99 Companies



Forming Our Future Leadership Conference

March 6-9, 2019
San Antonio, TX

222 Participants
91 Companies



DISTRICT EVENTS

PMA's 16 districts, our local ambassadors and the first place new members and prospects throughout North America experience their initial PMA involvement, provide members year-round access to education, social events and networking opportunities.

2018 Participation

64 Meetings
4,313 Participants

2018 Local Districts

California
Canada
Chicago
Cleveland
East Michigan
Indiana
Lone Star
New England

New York/New Jersey
Ohio Valley
Southeast
Southern New England
Tennessee
Twin Cities
West Michigan
Wisconsin

ROUNDTABLE AND DIVISION MEETINGS

PMA's roundtables and division meetings bring together members with specific interest areas and technologies to discuss hot-button topics and best practices, and present opportunities to develop their professional networks.

2018 Participation

9 Meetings
181 Participants
139 Companies

Roundtables

CFO
Quality
Sales and Marketing
Trainers/HR

Divisions

Custom Roll Forming Institute
Metal Fabricating
Metal Spinning
Metal Stamping
Slide Forming
Tool and Die





Learn.

KEY FOCUS: WORKFORCE DEVELOPMENT

During FY'18, workforce development was a major area of emphasis for the association. With an entire suite of training solutions—online training, live in-person training and a virtual learning series—PMA's workforce development team is committed to helping our members fill the manufacturing-skills gap.

METALFORM EDU

METALFORM EDU is an innovative online training program developed by industry experts. PMA invested significant resources to update our 37 PMA-exclusive courses and partnered with others to provide more than 550 courses in shop math, measurement, welding, lean, communication skills and more. METALFORM EDU helps increase employees' productivity, skills and engagement by providing access to modern, interactive courses. METALFORM EDU is a great supplement, or start, to a company's training program.



16 Districts represented
230 Trainees
77 Companies

Technical Seminars

PMA held 15 technical seminars during the year, training more than 600 participants. Topics included die maintenance, high-speed stamping, deep draw and more. New to the list of seminars for the year was press-line technology. PMA's technical seminars provide participants with knowledge and competencies needed to succeed in their positions.



15 Seminars
610 Participants
356 Companies

Management Development Academy (MDA)

An interactive three-part series of customized workshops, MDA is designed to grow middle managers' business and leadership acumen to prepare them for success in current and future roles. During FY'18, MDA Class Eight graduated 25 individuals, adding to the growing list of more than 175 graduates since the program's inception in 2012.



3 Meetings
25 Graduates
18 Companies

Precision Metalforming Association Educational Foundation

PMAEF launched and redesigned the Center for Metalforming Careers (C4MC) website, the result of a collaborative effort with PMA. The site houses free resources such as videos, tips and career brochures intended to help PMA members engage and attract new talent. PMA encourages companies to utilize the resources on C4MC, and to share their MFG Day stories and pictures.



center4metalformingcareers.org

Lead.

PUBLICATIONS

PMA's industry publications strive to serve the needs of the metalforming community. *MetalForming*, *MetalForming Spanish Edition* and *3D Metal Printing* magazines provide engineers, technicians, managers, designers and others with expert commentaries, industry news, case studies and updates on state-of-the-art products.

***MetalForming* Magazine – 50,000 circulation**

In FY'18, *MetalForming* magazine celebrated its 30th anniversary. In the November 2018 issue, *MetalForming's* editors took a look back over the past 30 years to see where the magazine has been, and looked forward to see where our industry is headed. In addition to celebrating 30 years, *MetalForming* magazine hosted four events during the year, including two new tremendously successful programs that are being brought back for FY'19. *MetalForming* magazine events are designed to advance the metalforming and fabricating industries by providing executives, engineers and associates with a range of important learning opportunities on technological advancements in software, processes, equipment, materials and more.



***MetalForming Spanish Edition*, published quarterly, has a circulation of 15,000.**

***3D Metal Printing* Magazine – 20,000 circulation**

FY'18 marked the third year of *3D Metal Printing* magazine. With a strong presence in additive manufacturing, *3D Metal Printing* magazine continues to be in the forefront of everything 3D metal printing, and its circulation continues to grow. A second e-newsletter has been added to the schedule each month due to increased interest in the magazine and in additive manufacturing as a whole. The magazine put on two events during the year, and these events are on tap for FY'19 as well.



MAGAZINE EVENTS

Mexico Metalforming Technology Conference

April 11-12, 2018
Guadalajara, MX

44 Participants
20 Companies



NEW

Internet of Things Experience for Metalformers and Fabricators

April 18-19, 2018
Nashville, TN

68 Participants
42 Companies



Mexico Additive Manufacturing and 3D Printing Conference

June 20-21, 2018
Queretaro, MX

39 Participants
27 Companies



3D Metal Printing Experience and Tech Tour

August 8-9, 2018
Pittsburgh, PA

45 Participants
33 Companies



Servo Technology Experience

September 25-26, 2018
Grand Rapids, MI

68 Participants
38 Companies



NEW

Lubrication Technology for Metalformers

February 12-13, 2019
Chicago, IL

120 Participants
57 Companies



FABTECH

PMA is a proud co-sponsor of three major industry tradeshow – FABTECH, FABTECH Canada and FABTECH Mexico. These high-visibility expositions provide platforms that showcase world-class suppliers and feature the latest industry products and developments. In addition, the FABTECH tradeshow offer learning opportunities on the latest trends and technology in the metalforming, fabricating, welding and finishing industries.



FABTECH 2018: Atlanta

668,135 net sq. ft.
1,550 exhibiting companies
33,755 attendees
130 educational sessions

METALFORM Pavilion (Atlanta)

55,900 net sq. ft.
245 exhibiting companies



FABTECH Canada 2018

95,990 net sq. ft.
311 exhibiting companies
7,611 attendees



FABTECH Mexico 2018

147,550 net sq. ft.
547 exhibiting companies
11,745 attendees

METALFORM Pavilion (Mexico)

22,400 net sq. ft.
104 exhibiting companies

Voice of the Industry

PMA is the voice of small and medium-sized metalforming companies, actively advocating on your behalf in Washington, D.C., for policies that strengthen manufacturing in America. PMA leads the way on Capitol Hill, and at the White House and federal agencies, supporting workforce training and recruitment programs, fighting to enforce trade laws while opposing tariffs on metals, and successfully lobbying to lower taxes while reducing ineffective regulations. Last year marked the first time in more than a decade that Congress passed, and the president signed into law, a significant funding increase for Career and Technical Education programs. In 2019, PMA is working to build upon that success and update the law, and have the Higher Education Act also include apprenticeships and credentials.

Funds Raised

PMA Advocacy Fund: \$77,000

PMAVIC: \$29,850



The PMA Advocacy Fund supports lobbying and strategic communications efforts in Washington, D.C. The PMA Voice of the Industry Committee (PMAVIC), the association's political action committee, supports pro-manufacturing candidates for Congress from both parties and all parts of the country.

One Voice Legislative Conference

PMA Attendees: 36

Congressional Offices Visited: 120

Fundraising Lunches and Coffees: 10





Key Successes

- Helped promote Manufacturing Day and scheduled plant tours throughout the year;
- Became a founding member of a nationwide campaign to promote credentials;
- Filed comments on Department of Labor overtime regulations;
- Sent a formal statement of priorities to the White House on U.S.-Japan trade agreement;
- Provided key information to the Senate chairman on the impact of steel and aluminum tariffs on PMA members;
- Became a founding member of the Coalition for American Metal Manufacturers and Users, opposing the steel and aluminum tariffs; and
- Lobbied Congress and the Administration, achieving important legislative and regulatory successes for the industry, including:
 - Passage of a law that provides a major expansion of Career and Technical Education funding
 - Introduction of the College Transparency Act
 - Increased funding for Manufacturing Extension Partnership (MEP) programs
 - Convincing the Commerce Department to allow tariff exclusions for steel and aluminum quota countries
 - Working with bipartisan Senators and Representatives to introduce tariff legislation
 - The removal of steel and aluminum tariffs on Canada and Mexico in May 2019, a culmination of the association's lobbying work throughout FY'18
 - Treasury Department accepting the definition of pass-throughs for tax cuts
 - Introduction of a bill eliminating the estate tax
 - Regulation for Association Health Plans (AHPs) being eased
 - NLRB reversing course to change rule covering the use of temporary workers
 - OSHA allowing post-incident drug testing
 - Labor Department no longer requiring electronic filing of OSHA Forms 300 and 301
 - White House releasing a regulatory reform process for secret science
 - EPA changing rule restricting power plant construction and upgrades

Key Initiatives / Accomplishments

During the year, PMA undertook many key initiatives, providing training and education programs to help members close the skills gap, offering benchmarking data to allow them to measure themselves against others in the industry, and serving as the metalforming industry's voice in Washington, D.C.

METALFORM EDU

In the fall of 2018, the PMA Educational Foundation helped to launch PMA's signature online learning system, METALFORM EDU. After the launch, PMA gathered a group of like-minded industry professionals and educators for a METALFORM EDU task force to discuss how to better the system and what new industry courses are needed for the future. Supported by data from early-adopter, focus-group feedback, the task force will help steward the direction and scope of METALFORM EDU to elevate the program in 2019 and beyond.

METALFORMING MAGAZINE WEBSITE REDESIGN

MetalForming's staff has been working throughout FY'18 to bring our readers and industry a brand new website. The new website is being designed to deliver the news readers need. Mobile functionality is a key feature of the new website, which will offer expanded technology areas and a greater number of media formats—podcasts, videos and whitepapers. Look for the new site to go live during the fall of 2019.

NEW PROGRAMS/BENEFITS

Dynamic Data

PMA launched this exciting new survey tool in August 2018, allowing members to measure their companies' performances against others in the industry. Surveys and the corresponding reports address executive compensation, wages and benefits, financial analysis, benchmarking, safety, and sales and marketing. Personalized reports are free to members who participate in the surveys.



Lubrication Technology

New to *MetalForming* magazine and PMA's conference lineup in FY'18 was the Lubrication Technology for Metalformers event. More than 120 industry professionals enjoyed this inaugural program, which also was supported by the Society of Tribologists and Lubrication Engineers.



PMA Pulse

Replacing the monthly Update e-newsletter, PMA launched the biweekly Pulse in January 2019 to provide a quick and easy read of key industry, association and member news, along with details on upcoming national and local PMA events.



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