



PMA

PRECISION
METALFORMING
ASSOCIATION

NETWORK. LEARN. LEAD.

2019

Annual Report

Dear Members,

As I look back on my first year as PMA's president, I am extremely proud of everything that the association and our members have accomplished. From producing dozens of events to meeting workforce development needs to making our voice heard in Washington, D.C., FY'19 was a busy and important year for the association and industry.

During this past year, PMA held more than 50 events that allowed our members to build relationships with their peers, gain valuable insight into industry trends and receive vital technical training. Highlights of FY'19 events include the Forming Our Future Leadership Conference in Honolulu, HI; One Voice Legislative Conference in Washington, D.C.; Automotive Parts Suppliers Conference in Detroit, MI; and Metal Stamping and Tool & Die Conference in Nashville, TN. Additionally, PMA has held dozens of meetings, seminars and roundtables, as well as our Management Development Academy.

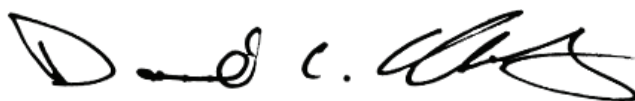
PMA continued to be the industry leader in workforce development, as FY'19 saw impressive growth in METALFORM EDU, our online training program that launched in FY'18. During the year we grew the library to more than 600 courses and switched the METALFORM EDU platform to create a better user experience and a more robust reporting/analytics system for managers. We also held 43 webinars—our highest number ever—to provide members with a variety of virtual-learning opportunities.

Additionally, PMA's industry-leading publications—*MetalForming* and *3D Metal Printing* magazines—provided expert commentaries, industry news and product updates. *MetalForming* magazine launched a new website in March 2020 with an exciting design and state-of-the-art functionality. PMA also 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 on key issues such as workforce development, tariffs and COVID-19 resources for our members. More detailed information about our efforts in these areas can be found throughout this report.

Finally, I would like to offer a special thank you to Allison Grealis—vice president of association services—who became the full-time president of the Women in Manufacturing Association (WiM) on April 1, 2020. Allison was a key part of PMA's success and growth for the past 20 years, and I wish her the best of luck as she continues her career with WiM.

On behalf of the entire staff, thank you for your investment in PMA. As we navigate through these unprecedented times, PMA remains committed to providing you with the information and tools needed to help your business continue to thrive. We look forward to working with you in 2020 and beyond. #TogetherPMA

Cordially,



David C. Klotz
PMA President



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PMA President

Precision Metalforming Association (PMA) serves 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

36

STATES

89,543

UNIQUE PMA.ORG
VISITORS

13

COUNTRIES

449,532

PMA.ORG
PAGE VIEWS

43

WEBINARS

53

CONFERENCES,
SEMINARS
AND EVENTS

9

BUSINESS
REPORTS

3,570

CONFERENCE, SEMINAR AND EVENT ATTENDEES

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



Key Initiatives and Accomplishments

COVID-19 (CORONAVIRUS) PANDEMIC RESPONSE AND RESULTS

In early March 2020, days before state governments' first stay-at-home orders were announced, PMA launched an initiative to help guide members as they confront challenges created by the COVID-19 pandemic. PMA quickly developed a dedicated webpage to provide key information related to COVID-19. The regularly updated webpage includes summaries and interpretations from PMA's advocacy team of important rules and guidance documents published by federal agencies, as well as notices summarizing state executive orders on essential critical infrastructure. Additionally, One Voice team members began conducting weekly webinars at the end of FY'19 to keep members updated on the latest government actions, and these are continuing in FY'20.

PMA also actively lobbied Congress for measures to support small and medium-sized businesses during the COVID-19 crisis, succeeding in securing eight recommendations that were submitted to the White House and Congress:

- Establishment of a two-year small business loan program (PPP)
- Increase of the investment interest limitation under 163(j)
- Payroll tax deferral
- Allow Net Operating Loss for five-year carrybacks
- Support for online learning programs
- Federal tax payment deferral
- Adjustment of bank regulations to allow lenders to work with businesses hurt by COVID-19
- Employee retention credits

As always, PMA combined government advocacy efforts with strategic communications, using a range of platforms to communicate externally with elected representatives and policymakers, and internally to communicate with members. PMA's team continued to conduct a robust media outreach to amplify our messages in traditional and social media. PMA members were featured in national, local and trade media stories about the impact of COVID-19 and manufacturers' response to the pandemic.

As of the start of FY'20, PMA is continuing to work with the White House, federal agencies and Congress—calling for policies and actions that will enable the metalforming industry to continue manufacturing the products the nation needs while operating safely.

METALFORM EDU UPDATES AND EXPANSION

After the successful launch of METALFORM EDU—PMA's innovative online training program—in November 2018, PMA created a group of like-minded industry professionals and educators for a METALFORM EDU task force to drive the direction and scope of the program. After focus-group feedback and data from user surveys, the task force made the decision to switch the platform that METALFORM EDU is housed on. After receiving bids and analyzing partners, the new platform went live in December 2019 with many enhancements, including a simplified purchasing process, easier system navigation, and robust reporting and analytics for learners and managers.

In addition to the new platform, more courses were added, increasing to more than 600 the number of courses in METALFORM EDU's library. And, PMA's Occupational Aptitude and Knowledge Assessment moved from a physical test to a license in the METALFORM EDU system.

TALKING WITH ONE VOICE PODCAST LAUNCH

To keep members updated on the latest news and developments occurring in Washington, D.C., PMA's advocacy team—The Franklin Partnership and Policy Resolution Group at Bracewell LLP—created the Talking With One Voice Podcast. Each week the One Voice team breaks down how the happenings in Washington, D.C., impact manufacturing businesses across the country.



PMA BOARD OF DIRECTORS CHANGES

After an extensive review and revision process by a task force comprised of PMA members and past chairs, followed by a vote of the manufacturing membership, PMA modernized its bylaws in January 2020. Among the key changes adopted at the start of FY'20: reducing the size of the official, legal board of directors to eight members plus the PMA president. The governing power, control and management of the affairs of the association is vested in the board. PMA also has a larger board of advisors—approximately 40 members whose purpose is to have a valuable role in bringing forward ideas and information from all divisions, districts, member classifications and the general membership.

METALFORMING MAGAZINE NEW WEBSITE LAUNCH

MetalForming magazine's original website went live in the late 1990s to provide its readers with online articles and industry developments. With incremental updates and changes to the website over the years, it was decided in 2017 that a new, redesigned website was needed. Development started in the summer of 2018 and internal testing started at the beginning of 2020. On March 17, 2020, the new website went live. With an exciting design and state-of-the-art functionality, the new website provides an unprecedented amount of technical information related to metalforming and fabricating processes through articles, white papers, videos, podcasts and much more.

FABTECH SHOW GUIDE CREATION

FABTECH Chicago 2019 saw the METALFORM pavilion move to the Lakeside Center East Building (Hall D) in McCormick Place, and *MetalForming* magazine created a show guide focused on METALFORM. Delivered to 18,000-plus readers in Illinois and surrounding states with the September issue, the guide included PMA technical conference highlights, the schedule of keynote presentations in the Lakeside Center, and a complete list and floorplan of METALFORM exhibitors. Published in a convenient and easy-to-carry digest size, the guide also was available onsite during FABTECH and provided our exhibitors with additional exposure and value.





Network.

SIGNATURE EVENTS

PMA's signature events are annual, large-scale programs designed to offer industry-leading intelligence for metalforming leaders to hone their skills and gain invaluable insight into industry trends. Signature events expand your professional network and help transform your business. During FY'19, PMA held four signature events that put members in front of their government representatives, addressed the changing automotive industry landscape, dove into new technology, gained new insight into evolving/maturing technologies and brought together metalforming leaders in Honolulu to guide the industry forward together.

One Voice Legislative Conference

April 8-10, 2019
Washington, D.C.

57 Participants
48 Companies



Automotive Parts Suppliers Conference

April 29-30, 2019
Detroit, MI

117 Participants
90 Companies



Metal Stamping and Tool & Die Conference

January 28-29, 2020
Nashville, TN

201 Participants
119 Companies



Forming Our Future Leadership Conference

March 4-7, 2020
Honolulu, HI

228 Participants
82 Companies



Total Signature Event Participants: 603

Total Signature Event Companies: 339

DISTRICT EVENTS

The backbone of the association, PMA's 17 districts throughout North America are our local ambassadors and the first place that new members and prospects experience their initial involvement. Providing year-round programming unique to the needs of the local area served, PMA district members solve problems, exchange knowledge and experiences, develop lifelong friends, and give back to their communities.

2019 Participation

69 Meetings
4,029 Participants

2019 Local Districts

California	New York/New Jersey
Canada	Ohio Valley
Chicago	Southeast
Cleveland	Southern New England
East Michigan	Tennessee
Indiana	Twin Cities
Lone Star	West Michigan
Mexico	Wisconsin
New England	



ROUNDTABLE AND DIVISION MEETINGS

PMA's roundtable and division meetings provide intimate and unique forums that allow members to share best practices and, with like-minded colleagues, resolve challenges faced by their companies. These meetings provide members with the opportunities to develop their professional networks.

2019 Participation

5 Meetings
109 Participants
82 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

EXECUTIVE NETWORKING GROUPS

Member-exclusive executive network groups bring together mid- and senior-level executives to exchange ideas and compare experiences within a confidential and legal format. With five networking groups, members are able to generate new ideas, benchmark operations and expand their networks during the multiple meetings held each year throughout the United States.

2019 Participation

13 Meetings
80 Participants
76 Companies

Networking Groups

GADA Executive Networking Group	It's Just Business (IJB)
Naples Executive Networking Group	The Cellars Group
Press Club Networking Group	

Learn.

PMA understands the importance of a skilled and trained workforce. Throughout FY'19, PMA provided our members with a range of workforce development programs for entry-level workers to executives to future company leaders.

METALFORM EDU

Launched in November 2018, METALFORM EDU has offered a key benefit to our members. FY'19 was a great success and saw a 47-percent increase in use by companies with a total of 925 trainees—a 302-percent increase from FY'18. Also, FY'19 saw the launch of the Spanish Metalforming License, which included the 32 courses developed specifically for the metalforming industry by PMA.

METALFORM EDU was a huge driver of new members to the association during FY'19. Approximately 30 percent of new membership in FY'19 can be attributed to METALFORM EDU. The most popular license during the year was the one-month full library—29-percent, with the three-month full library license—18-percent—as the second most popular.

Technical Seminars

PMA held 12 technical seminars during the year, training 405 participants. Topics included high-speed stamping, transfer automation, deep draw and more. Also, PMA introduced two new technical seminars during the year: Die Setting Practices and Press Safety, and Servo Press Line and Maintenance Technology. PMA's technical seminars provide participants with the knowledge and competencies needed to succeed in their positions.

Webinar Series

With 43 webinars produced during FY'19, PMA curated knowledge experts to provide members with a range of training on demand. Webinars during the year discussed industry trends, statistics and benchmarking, legal and regulatory updates, technical training, and utilizing PMA membership resources.

New in FY'19 was the Workforce Matters Virtual Learning Series. Held monthly, this series dove deep into topics geared toward human resources managers and executives. Topics included how to create a training program, where to find talent, building a company culture, training future leaders and how to utilize government resources to fund training.



925 Trainees
113 Companies



12 Seminars
405 Participants
275 Companies



43 Webinars
1,385 Participants

Management Development Academy (MDA)

Twenty-three individuals graduated from MDA Class Nine in FY'19. 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. With more than 200 graduates since the program's inception in 2012, we are excited to celebrate our 10th class in FY'20.



3 Meetings
23 Graduates
19 Companies

PMA Educational Foundation (PMAEF)

During FY'19, the PMA Educational Foundation (PMAEF) worked on aligning its strategic direction with PMA's workforce development strategy. During the year, PMAEF supported the development of new courses in METALFORM EDU, redesigned district grants program and supported members during MFG Day by providing micro-grants to support innovation and encourage member companies to dedicate funds to develop and implement programs that impact manufacturing.



Lead.

VOICE OF THE INDUSTRY

PMA is the voice of small and medium-sized metalforming companies, advocating on your behalf in Washington, D.C. for policies that strengthen manufacturing in America. PMA's One Voice team of advocates are working with the U.S. Congress, White House and federal agencies to promote policy issues important to PMA members, including workforce training and recruitment programs, enforcing trade laws while opposing tariffs on metals, and advocating for tax reform while reducing ineffective regulations.

Funds Raised

Advocacy Fund: \$55,000

PMAVIC: \$32,000

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 2019

PMA Attendees: 27

Congressional Offices Visited: 95

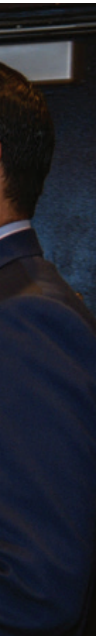
Fundraising Lunches and Coffees: 8



Key Initiatives

Through the One Voice team, PMA engaged in the following advocacy activities:

- Became a leading resource for manufacturers on COVID-19, lobbying the White House and Congress for support of PMA members (See page 8 for more details)
- Lobbied Congress and the Trump administration, achieving important legislative and regulatory successes for the industry, including:
 - Repeal of the medical device tax; health insurance tax; Cadillac health care tax
 - Twice blocked attempts to impose up to 100-percent tariffs on copper-based alloys
 - Increase of \$30 million for Workforce Innovation Opportunity Grants; \$15 million more for registered apprenticeships; \$16 million more for Manufacturing Extension Partnerships (MEPs); and increased the maximum Pell Grant award to \$6,345
 - Creation of Industry Recognized Apprenticeship Program (IRAP)
 - Passage of the Higher Education Act in the House
 - Convinced Trump administration to request \$200 million for the Labor Department to expand registered apprenticeship and industry-recognized apprenticeship program
 - Passage of a more reasonable overtime rule
 - Convinced the NLRB to change the ambush election rule for unions
 - Passage of a new NAFTA, signed into law by the president
 - Commerce Department allowing companies to file complaints against China currency manipulation
- Submitted recommendations to the Education/Labor Committees on updating the National Apprenticeship Act, which Congress has not revised since 1937
- Worked with Senate on legislation to address steel and aluminum tariffs
- Submitted comments to the U.S. Department of Labor on lockout/tagout
- Filed comments with the White House on environmental impact reviews that delay infrastructure projects
- Filed comments and lobbied to issue a new Waters of the U.S. rule at the EPA



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.

Toward the end of FY'19, the magazines welcomed Michael Vohland as the new publisher. Michael's 20-plus years of experience is a great addition to the team.

***MetalForming* Magazine – 46,800 circulation**

During FY'19, the *MetalForming* magazine staff was busy behind the scenes designing and developing a brand new website to bring our readers the best experience in keeping tabs on the industry and its technology. In March 2020, the new site launched with a clean design and better-than-ever user experience. In addition, the magazine produced four events (three in the United States and one in Mexico), which brought together 328 attendees. One of the events, the inaugural Hot Stamping Experience and Tech Tour, received a great response from attendees. For FY'20, the event has been expanded to a two-day conference.

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



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

FY'19 marked the fourth year of *3D Metal Printing* magazine. The publication continues to be at the forefront of everything 3D metal printing, and its circulation continues to grow. During the year, the magazine produced two events—in Mexico and the United States—that brought together more than 100 attendees to learn the latest on additive manufacturing.





PUBLICATION EVENTS

MetalForming and *3D Metal Printing* magazine events are designed to advance the metalforming, fabricating and additive industries by providing executives, engineers and associates with a range of important learning opportunities on technological advancements in software, processes, equipment, materials and more. During FY'19, the magazines put on six events and introduced a new conference, the Hot Stamping Experience and Tech Tour. The Internet of Things Experience was another great success during its second year, and moving forward to FY'20, the conference will be transitioned to a PMA signature event due the importance of the technology to the industry.

Mexico Additive Manufacturing and 3D Printing Conference

June 12-13, 2019

Monterrey, México

28 Participants

17 Companies



Internet of Things Experience

June 24-25, 2019

Cleveland, OH

87 Participants

47 Companies



3D Metal Printing Experience and Tech Tour

August 6-7, 2019

Detroit, MI

80 Participants

51 Companies



Mexico Metalforming Technology Conference

August 21-22, 2019

Querétaro, México

85 Participants

32 Companies



NEW

Hot Stamping Experience and Tech Tour

September 17, 2019

Lapeer, MI

65 Participants

41 Companies



Lubrication Technology for Metalformers

February 12-13, 2020

Schaumburg, IL

91 Participants

41 Companies



FABTECH

PMA is a proud co-partner of three major industry tradeshow—FABTECH, FABTECH Canada and FABTECH Mexico. During FY'19, FABTECH and FABTECH Mexico took place in Chicago and Mexico City respectively. 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 2019: Chicago

830,655 net sq. ft.
1,748 exhibiting companies
48,278 attendees
175 educational sessions

METALFORM Pavilion (Chicago)

68,875 net sq. ft.
250 exhibiting companies



MEXICO

FABTECH Mexico 2019

156,210 net sq. ft.
498 exhibiting companies
11,090 attendees

METALFORM Pavilion

24,000 net sq. ft.
113 exhibiting companies



METALFORM

B₁
NORTH

B₁
NORTH

NORTH

NORTH

FABTECH

FABRICATING
A₁
SOUTH

A₁
SOUTH

A₁
SOUTH

STRAIGHT AHEAD TO
REGISTRATION
BALLROOM BISTRO
HOTEL SHUTTLE ROUTES 4-6
HYATT HOTEL

MEETING ROOMS 5101-5106
PARKING LOT A
TAXI/RIDE SHARE

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