

> KEEPING OUR PROMISE

The National Association of Manufacturers works for the success of the more than 12.8 million men and women who make things in America.

Our work is centered around four pillars that make our industry strong and America exceptional: free enterprise, competitiveness, individual liberty and equal opportunity.

These pillars guide what we do every day; whether it's standing up for manufacturers in Washington, D.C., inspiring the next generation of manufacturing talent, providing news and intelligence about the industry or helping members innovate and advance.

Representing 14,000 member companies—from small businesses to global leaders—in every industrial sector, we are the nation's most effective resource and most influential advocate for these values and manufacturers across the country.

We are a one-stop shop for manufacturers and manufacturing.

By the Numbers:



Percentage of Fortune 100 manufacturers that are NAM members



Percentage of Fortune 500 manufacturers that are NAM members



Percentage of NAM members that are small and medium-sized manufacturers



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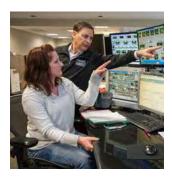
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Defying the Odds. Setting Records.



The NAM once again defied the odds in 2018, delivering historic wins for manufacturers. While others said it was impossible to get results in a tumultuous election vear. the NAM did what manufacturers do best: bring people together. We achieved important bipartisan wins in

Congress, in addition to our work with the administration to secure regulatory relief as well as our successful fights in the courts to protect manufacturers' competitiveness.

It was also a record-setting year, as our members reported the highest levels of optimism in the 20-year history of our Manufacturers' Outlook Survey. And it's no surprise. After all, for manufacturers, it was a year of creating jobs, investing in companies and communities and raising wages and benefits. Manufacturers demonstrated that we are keeping our promise to deliver for our people with the tools we've been given, and we will continue to do so in 2019.

Meanwhile, the NAM is keeping the commitment we made to our members, the promise laid out in our "2020 Vision": to be the "one-stop shop" for manufacturers and deliver enhanced programming in advocacy, workforce development, legal action and operational excellence.

Our advocacy wins, outlined in this report, were possible because the NAM has cultivated relationships of trust and respect across the political spectrum. Not only are we recognized as a powerhouse in Washington, D.C., but we have also expanded our presence in key manufacturing states as we built out our regional public affairs operation.

Through The Manufacturing Institute, our workforce development leadership is yielding results and addressing the workforce crisis. After a successful inaugural year, Heroes MAKE America is growing rapidly, while initiatives

like STEP Ahead, Manufacturing Day and Creators Wanted are inspiring a new generation of manufacturing talent.

In the courts, the Manufacturers' Center for Legal Action racked up wins, including major victories at the U.S. Supreme Court, that will protect manufacturers from overreaching regulations from the past administration and from frivolous litigation from trial attorneys.

With the landmark integration of the Manufacturing Leadership Council, the NAM's portfolio of operational excellence programming has grown even stronger. From co-branded events and webinars on the latest in manufacturing technology to new ways to help you save money, the NAM is enhancing our offerings that help your business thrive in a disruptive environment.

In 2018, the NAM set new membership records, demonstrating that manufacturers greatly appreciate our comprehensive value proposition, along with the tailored, personalized approach we take toward our members' needs and concerns. You can be confident in your investment in your NAM, and our best-in-class team in Washington, D.C., and across the country is always at the ready to support you in any way we can.

This annual report captures why 2018 was a history-making year for manufacturers—and why we can confidently face the future. The association is positioned like no other for the new political and economic realities. Your NAM is trusted, respected and prepared to secure more wins to improve the lives of the men and women who make things in America.

Summons

Jav Timmons President and CEO

// TABLE OF CONTENTS







10 **ADVOCATING FOR PROGRESS**

FIGHTING FOR JUSTICE

ADVANCING OUR WORKFORCE

ADVOCATING FOR PROGRESS



98



When the NAM speaks, people listen. That's because our first-rate advocacy team has cultivated trusted relationships in the White House, on Capitol Hill, in the media and across the country-and has built an unmatched ability to mobilize in support of our issues.

In 2018, we continued strengthening our government relations, communications and public affairs and mobilization teams, driving even greater support for manufacturing outside of Washington to achieve the progress we need inside Washington.

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That strength is borne out in extraordinary results. On every issue, in every arena, the NAM has made the case for our members and our industry-and at every level, we have made a difference.



President and CEO Jay Timmons and NAM Senior Vice President of Policy and Government **Relations Aric Newhouse** "Top Lobbyists" for

2018. An influential Washington, D.C., media outlet. The Hill recognizes those who "have demonstrated their ability to wield influence and deliver results on Capitol Hill and in the administration on behalf of clients and groups seeking a voice in Washington."

Persuading Policymakers

The NAM's relationships with leaders of all backgrounds and political stripes not only made us effective in the past vear but also ensure that we will remain the premier trade association and business advocacy organization in the country over the years to come.

Our relationships are strong with leaders and policymakers across the board, because the importance of the manufacturing sector cuts across party lines. Even as the House of Representatives changes hands—and regardless of whatever political changes occur in the future-the NAM is well-positioned to retain our influence and increase our clout, providing a strong voice in Washington and an unbeatable ally in the critical conversations ahead.

The NAM is not only a powerful solo advocate for change. We're also active in building and leading coalitions of likeminded organizations to fight for the policies we need, both here in the United States and around the world. Our members can expect the full force of the NAM's support, and our strategic focus means they also have the benefit of our partners and related industries.

NAM Award for Manufacturing **Legislative Excellence**

The NAM Award for Manufacturing Legislative Excellence honors members of Congress who support policies that enhance the ability of manufacturers in the United States to succeed. In the 115th Congress, 272 members of the House and Senate who voted in support of manufacturing at least 70 percent of the time on key legislation earned this distinction.

"There are a lot of people in this political moment that are searching to understand how the system is working or not working and what's going on... and that probably has made [the NAM] more relevant to people than they might have been before."

- Sen. Michael Bennet (D-CO)



Driving the Message

Our public relations professionals detail the story of manufacturing in America and deliver it to the media so that policymakers and everyday Americans are informed about the issues that impact manufacturing workers and their families.

NATIONAL MEDIA

The NAM doesn't just tell manufacturers' story-we make sure it gets heard. Last year, the NAM drove the news in more than 50,000 earned media articles, drawing attention to the industry's successes and advocating our members' priorities. Our media relations professionals know how to connect with reporters and generate stories, and journalists know that the NAM is the best source for manufacturing news.









Amplifying our members' stories by utilizing our relationships with major news outlets, such as:



SOCIAL MEDIA

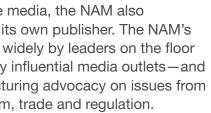
One reason the NAM has been successful in recent years is that we have adapted to changing technology and methods of communication. Over the past year, we have led in social media interactions, receiving more than three times as many social interactions as the next top trade group and significantly more than any other business trade organization - and our messages have been shared by everyone from members of Congress to the president of the United States.

NAM.ORG

In addition to earning coverage in the media, the NAM also develops its own stories and acts as its own publisher. The NAM's original content has been referenced widely by leaders on the floor of the House and Senate and cited by influential media outlets-and is a recognized resource for manufacturing advocacy on issues from energy and labor policy to legal reform, trade and regulation.



Proxy advisers directly impact millions of retail investors, but they have operated traditionally outside of the public eye with little oversight. In 2018, the NAM and the U.S. Chamber of Commerce partnered on an effort to push for reform and additional scrutiny of proxy advisers through a six-figure ad campaign geared toward the Securities and Exchange Commission and other policymakers. The ads draw attention to the threats that unrestrained proxy advisory firms pose to the savings and investment accounts of workers and retail investors and included an open letter on behalf of American workers and retirees that was published in Politico, The Washington Post, The Hill and The Wall Street Journal.



NAM in Action: SEC **Proxy Advisory Firm** Reform



POLITICO

[NAM leadership] has emerged as an unlikely Washington power center under the Trump administration, enjoying easy West Wing access...."

- Politico

There's a reason everyone talks about manufacturing today. The NAM is relentless in getting the press to focus on what we do and on building our own news source for sharing our stories with the public."

- Steve Staub, president, **Staub Manufacturing** Solutions



Mobilizing Supporters

The NAM's strength is also found in states and communities across the country, where candidates and elected leaders vie for the attention and trust of millions of manufacturing employees. The voices of our members and manufacturing supporters move votes and change minds. When the NAM mobilizes our supporters, we unleash our most effective advocates for progress.

FRIENDS OF MANUFACTURING

The NAM's digital mobilization platform expands the NAM's influence with lawmakers by reaching voters directly-recruiting them to take action on policy priorities that help manufacturers keep making things in America. Our growing network of manufacturing employees, their families and others who care about our industry has enabled the NAM to bring our message to the advocates most likely to take action-and to mobilize them in ways that get the attention of elected officials in Washington.

REGIONAL PUBLIC AFFAIRS PROGRAM

The NAM delivers a uniquely effective outside-the-Beltway advocacy program through the addition and efforts of regional public affairs staff, who work to engage manufacturers, community stakeholders and local officials in support of the manufacturing agenda. This on-the-ground capability-national in scope, but focusing intensively on an eight-state region—helps the NAM build networks of manufacturing advocates in key areas who can be spurred to action on any advocacy priority.



"With state manufacturing groups and its Council of Manufacturing Associations, the NAM brings together manufacturers and workers in all 50 states and in Puerto Rico. That strengthens my company's voice in a way that gets results."

- Chuck Wetherington, president, BTE Technologies, Inc.

COUNCIL OF MANUFACTURING ASSOCIATIONS

Our Council of Manufacturing Associations comprises 260 national manufacturing trade associations and 130,000 member companies worldwide. The CMA fosters strategic partnerships across the manufacturing industry, amplifying manufacturers' voices and linking associations to NAM industry and policy experts. CMA members gain insights, share perspectives and ensure manufacturers have a strong voice on critical legislative and policy matters impacting manufacturers from a wide range of sectors. The CMA provides opportunities to tap valuable resources, cultivate innovation, stay abreast of manufacturing issues and form impactful coalitions around common concerns.



Winter Leadership Conference

At the CMA 2018 Winter Leadership Conference in Philadelphia, Pennsylvania, the leaders of influential manufacturing organizations came together to learn from each other and from outside experts to advance manufacturers' goals.

Summer Leadership Conference

The CMA held its Summer Leadership Conference in Chicago, Illinois, to advance ideas and strategies to lead the future of manufacturing. The NAM convened manufacturing trade association executives, staff and sponsors for a unique opportunity to collaborate on promoting shared policy goals and industry objectives.



STATE ASSOCIATIONS GROUP AND ALLIED ASSOCIATIONS GROUP

The NAM's network of state-based manufacturing organizations drive manufacturers' priorities on state issues, partner with the NAM to mobilize local communities and work with the NAM to move federal policy from the ground up in all 50 states and in Puerto Rico. On many of our issue advocacy campaigns, our state partners help drive the NAM's work and advance our shared priorities in key states by leveraging their own reach and relationships with their congressional delegations and local and state officials.

The NAM's State Associations Group members work collaboratively within and across states to advance policies that help manufacturers succeed at the local level, from cutting regulations to promoting job growth.

These state groups are true NAM partners-amplifying our message, increasing the size of our army and helping us leverage grassroots networks in every state to make the case for progress convincingly.

The NAM's Allied Associations Group of regional manufacturing organizations provides a channel for companies, associations and trade groups to stay involved in policy discussions nationwide. By joining together collectively, the Allied Associations Group ensures that the manufacturing industry's voice is heard in Washington and in your local community.







MERI

Building US Up Listening Tour

The NAM formed the Building US Up Listening Tour to help lead a nationwide discussion about the challenges local manufacturing leaders face and what they want from their legislators. Held in restaurants and meeting places in manufacturing communities, the Building US Up Listening Tour allowed the NAM to continue building relationships with local leaders who have influential voices with legislators on key issues.



GETTING RESULTS

In the first few months of the Trump administration, Emerson Chairman and CEO and NAM Board Chair David Farr reached out to our members to solicit input on areas where we needed to make progress for the manufacturing industry. We developed a list of items in need of action and reform. And today—as a result of the NAM's hard work and unrelenting advocacy—we are seeing real and extraordinary results.

TAX REFORM

The enactment of tax reform in 2018 was by no means assured. The NAM defined tax reform as a manufacturing issue and ensured that manufacturers' priorities were included in the final bill, frequently advising the White House and top congressional leaders on the path forward. We mobilized manufacturers, our grassroots advocacy network and industry partners to reach out to Senate offices, countering opposition every step along the way. And we applied intense pressure through our communication tools to fight back against our adversaries and inspire our allies. There is no doubt that the NAM made tax reform possible—and without the NAM's aggressive advocacy, we could not have accomplished what we did.

Supporting Champions of Manufacturing

To respond effectively to the new political environment, one of the most powerful tools we have at our disposal is our political action committee. NAM-PAC increased its total fundraising by nearly 50 percent and individual contributions by 130 percent over 2017—while also hosting events that raised critical funds for promanufacturing candidates on both sides of the aisle.

KNAM-PAC

- 130 percent increase in funds raised from individual contributors compared with 2017
- 76 percent of individual contributors in 2018 were first-time donors









Spotlight on the Economy

- Nearly 4 percent GDP growth in 2018 is best in more than a decade.
- 284,000 manufacturing employees added over the past year—nearly 24,000 per month.
- 12,842,000 manufacturing workers in December, the most since December 2008, with 1.4 million employees added since the end of the Great Recession.
- Manufacturing job openings are at an all-time high, and, in the larger economy, there are more postings than people looking for work.
- Manufacturing contributes \$2.7 trillion annually to the American economy and has the largest economic impact of any major sector.

Since tax reform was signed into law in 2018, the NAM has worked to protect it from threats and highlighted the benefits of the law with decision-makers on Capitol Hill and the public at large. The new tax code means money can stay where it's needed most—empowering manufacturing workers to invest in the community, support their families, grow the economy, create more secure jobs, increase wages and make manufacturing in the U.S. more competitive. In 2017, at the request of the White House, the NAM compiled a list of 158 regulations in need of modernization, simplification or removal. Through 2018, 104 (66 percent) had been fully addressed or are close to being finalized, providing historic and significant regulatory relief to manufacturers from some of the most onerous energy, environment and labor regulations.

158 regulations identified 56 regulations fully addressed ddressed, pending finalization

ENERGY POLICY

The NAM is leading the way in energy-efficiency and sustainability efforts that positively impact manufacturing and the industry's contributions to environmental protection. Over the past year, we have worked with Congress and the Trump administration to advance an energy strategy that embraces all forms of domestic energy production while expanding existing conservation and efficiency efforts. Through partnerships with the Energy Department and the Environmental Protection Agency, the NAM is helping to spotlight best practices and empower manufacturers to make even greater strides toward keeping our promises for a better, safer, cleaner environment.



During a meeting in February 2017, Mr. Trump turned to David Farr, CEO of Emerson Electric Co., and asked him to come up with a list of regulations the industry found onerous. Within a month, the National Association of Manufacturers, which Mr. Farr chairs, submitted a 42-page report."

- The Wall Street Journal

TRADE PRIORITIES

The NAM has played a defining role in promoting the success of manufacturing in the United States and in the global economy through our work to address foreign trade distortions and to open markets, improve the trade competitiveness of manufacturing in the United States and seek robust enforcement of trade rules and agreements. Our "Trading to Win" agenda is designed to ensure that manufacturers have the clearest and most influential voice in the conversation, making the case for more global trade and better trade rules, with a focus on the following:

Second Se

Boosting U.S. competitiveness

Strengthening global standards

Improving trade enforcement

Over the past year, we have protected vital interests and promoted manufacturing's position. And in turbulent times, we have demonstrated that we know how to navigate the public debate on all sides of the political spectrum to support our constituency: manufacturers.



New Trade Negotiations

With the NAM's support, the Trump administration announced its intention to begin trade agreement negotiations with the European Union, Japan and the United Kingdom rather than pursuing additional tariffs. The NAM will work with our members to open trade and set strong and fair standards that are fully enforceable.

United States-Mexico-Canada Agreement

Conventional wisdom said NAFTA was dead or that bilateral deals were the only option. Instead, the NAM insisted on a trilateral deal, leading the charge in the White House and Congress to protect our priorities. As a result of our advocacy, the United States–Mexico–Canada Agreement was signed on November 30, including strongly positive outcomes on duty-free treatment, intellectual property, digital trade and regulatory practices, while improving original proposals on investor-state dispute settlement, rules of origin and the duration of the agreement. We are working with the administration and leaders on Capitol Hill to move the USMCA forward and to ensure it is ratified to empower manufacturers and support manufacturing workers.



Export-Import Bank

The NAM is the recognized business community leader on the Ex-Im Bank. The NAM not only prevented the evisceration of the Ex-Im Bank through our successful opposition to Scott Garrett's confirmation (which relied upon extensive education and membership activation), but also strongly supported other nominees, including current nominee Kimberly Reed. We are now working closely with our allies to secure reauthorization in 2019.

U.S.–Korea Free Trade Agreement

The NAM provided real-time input to prevent U.S. withdrawal from the U.S.– Korea Free Trade Agreement, while advancing manufacturers' priorities for improving the commercial relationship.

Synthetics Trafficking and Overdose Prevention (STOP) Act

The NAM drove legislation that makes it easier to track counterfeit goods and dangerous products from countries like China, protecting Americans' safety and intellectual property.

Miscellaneous Tariff Bill

The NAM led a business community-wide effort and deployed a sustained and targeted advocacy approach to ensure the Miscellaneous Tariff Bill received full support in Congress. The House and Senate unanimously passed the MTB, which the president signed into law. The bill will provide NAM members with more than \$330 million in total tariff savings from 2018 to 2020.

China

While others merely criticized the White House on tariff policy, the NAM was the first to offer a positive solution: a bilateral, enforceable trade agreement with China. The NAM explained that tariffs cause serious challenges for manufacturers and successfully pushed for a temporary tariff "truce."

EAGL Engaging America's Clobal Leadership

The NAM spearheads the Engaging America's Global Leadership Coalition. which promotes strong U.S. leadership in the United Nations, the World Health Organization, the Organisation for Economic Co-operation and Development and other international groups. Whether ensuring the protection of American innovation or representing our country in U.N. bodies, America's diplomats and Congress must stand up for manufacturing, hold international organizations accountable and drive reforms that make a difference.

TRANSPORTATION AND INFRASTRUCTURE

Manufacturers need a modern infrastructure system to remain competitive in a global economy. That's why the NAM developed the "Building to Win" blueprint, a comprehensive plan to modernize and invest in roads, bridges, rails, airports, pipelines, ports, waterways, broadband and more-the infrastructure that makes the American Dream possible. Today, the NAM is the leading voice in a bipartisan push for infrastructure investment.



Uniform Trucking Regulations

After years of advocacy efforts, the NAM was instrumental in securing federal pre-emption over duplicative, patchwork state rules governing truck drivers' time behind the wheel. Maintaining uniform regulations for interstate commerce is essential for just-in-time operations. The NAM is a lead advocate for solutions to other trucking issues, such as driver shortage and hours of service.



The NAM has been a stalwart voice before Congress and the administration to advance and support market-based health care solutions. Ninety-eight percent of NAM members provide health care benefits to maintain a healthy workforce, attract and retain talent and because they believe it is the right thing to do for their employees. Manufacturers strongly support proposals to reduce soaring health care costs, improve the efficiency of the current system and enhance the quality of care. The NAM has worked aggressively with Congress and the Trump administration to drive down health care costs and ensure reforms to America's health care system are smart and effective-and work for manufacturers in America and our employees. The NAM also proudly advocates an innovation climate and supports efforts to keep pharmaceutical manufacturing in America strong, pushing back against regulatory and legislative proposals emanating from foreign governments, academia, the halls of Congress and state capitols that threaten innovation.

RESEARCH, INNOVATION AND TECHNOLOGY

The NAM has underscored the importance of strong intellectual property protections through formal comments and submissions to Congress, the administration and foreign governments and continues to advocate strong provisions on patent, copyright, data, trademark and trade secret protection in ongoing trade negotiations. The manufacturing sector accounts for three-quarters of all private-sector research and development in the nation-and the NAM supports a clear and effective federal partnership to enable and drive technology adoption across the manufacturing sector. Over the past year, we have stood against unnecessary or ill-advised regulatory actions like attempts to reinstate net neutrality and promoted protections for intellectual property rights and coordination on research, innovation and technology policy.

Federal Aviation Administration Reauthorization

The NAM helped to pass the bipartisan, five-year FAA Reauthorization Act. which enhances aerospace manufacturing, improves FAA certification processes and funds airport infrastructure, among other critical needs.

Next-Generation Broadband

The NAM supported a Federal Communications Commission order to streamline regulations and speed the buildout of 5G infrastructure, along with a similar effort in the Senate led by Senate Commerce Committee Chairman John Thune (R-SD).





Data Privacy

Data is driving innovation in manufacturing processes and products today. In the wake of international and state-level data privacy regulations, the NAM is advocating a federal data privacy approach that protects consumers, promotes competitiveness and advances U.S. leadership in emerging technologies.

A POSITIVE LABOR AGENDA

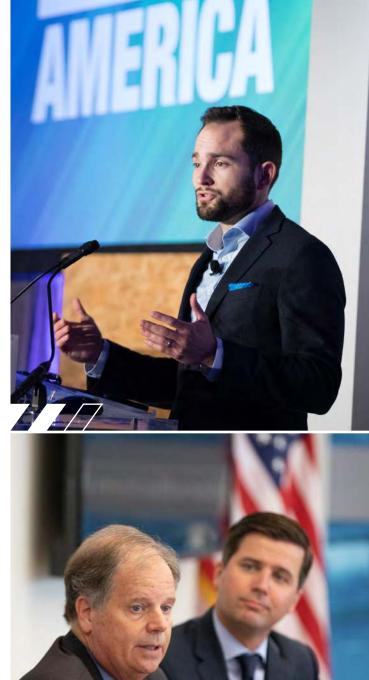
The NAM is committed to defending the rights of manufacturers and their employees and fighting changes to our labor law system that undermine employer-employee relations. On average, the Obama administration's Department of Labor finalized nearly twice as many major labor regulations per year than the previous four administrations. That's why the NAM has not only challenged every major labor regulation issued by the Obama administration, including the overtime rule, injury and illness reporting, the persuader rule and the silica rule, we've also worked with the Trump administration to ensure that manufacturers have a healthy environment to build, grow and succeed.

IMMIGRATION REFORM

U.S. immigration reform is essential to the nation's competitiveness. At the NAM, we've spearheaded efforts to fix our broken system, make the system more responsive to manufacturers' needs and provide certainty for DACA (Deferred Action for Childhood Arrivals) recipients and undocumented immigrants. We're working with members of Congress to push for smarter immigration policies, including the NAM's "A Way Forward" immigration plan, speaking out against abuses of the system and advocating policies that advance America's values.

CRIMINAL JUSTICE REFORM

Criminal justice reform is necessary to improve the fairness of our system, offer redemption for nonviolent offenders and open new doors for Americans looking for the dignity of a job. With more than half a million jobs we need to fill, manufacturers are eager to help these Americans get a new start, just as they can help us grow and succeed here in the United States. That's why the NAM advocated passage of the FIRST STEP Act-a bipartisan bill President Trump signed into law.





RECORD OPTIMISM-IN MANUFACTURING AND AT THE NAM

In 2018, manufacturers reported the highest level of optimism in the 20-year history of the NAM's Manufacturers' Outlook Survey. On average in 2018, 92.4 percent of manufacturers surveyed reported a positive outlook for their companies. In the fourth guarter of 2018, manufacturers predicted strong growth rates in employee wages (2.3 percent), capital investments (2.6 percent) and sales (4.3 percent) over the next 12 months. These survey findings drove headlines throughout the year and were touted by President Trump, members of Congress and the media alike-shining a spotlight on our industry and association.

Record Optimism, Record Results

There's a reason why manufacturers are more optimistic than ever about the direction of the industry. Manufacturers know that the NAM has their backs and is delivering the fair playing field and support they need to succeed and grow. We're not just promising great things. We're making good on our promises and exceeding expectations, paving the way to a brighter, sustainable future.



Jay Timmons 🧔 @JayTimmonsNAM · 12 Apr 2018

reat to be with @POTUS in the Rose Garden today highlighting our survey sults and the positive impact of tax cuts. POTUS promised us in Sept. that tax reform would be "rocket fuel" for manufacturers. We're delivering.

Jay Timmons 😒 @JayTimmonsNAM

Breaking! Our latest @ShopfloorNAM Outlook Survey is registering historic levels of optimism among manufacturers (93.5%). Pleased to share the latest results via an exclusive with @FoxBusiness --> fxn.ws/2qqAisn

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2018 NAM Member Survey



agreed that the NAM provided good value for their dues.



said the NAM has been effective in affecting legislation and policy.



said the NAM has been more effective than other advocacy organizations.



said the NAM is on track to implement our 2020 Vision.

KEEPING OUR PROMISE

Manufacturers' future success depends on our continued credibility, which is why the NAM has also taken the step of demonstrating that manufacturers are following through with our promises. Manufacturers have long said that tax reform and regulatory certainty would mean jobs, growth and investment. Through the Keeping Our Promise campaign, the NAM is showing that manufacturers are hiring new workers, investing in equipment and facilities, raising wages and benefits and giving back to their communities - all while making our environment cleaner and our workplaces even safer.

This campaign isn't just about touting manufacturing's success. It's also about reminding lawmakers, community leaders and people around the country that the victories we have won and the promises we have kept have had a real and vital impact on businesses, individuals and communities nationwide. These are the men and women we fight for every day-and we will continue to fight for them in the years ahead.

A few of the businesses that have pledged new investments, new hiring and worker bonuses as a result of NAM victories include the following:

- Amgen: Announced \$300 million investment in a new biologics manufacturing plant
- AT&T: Announced \$1 billion investment and \$1,000 bonuses for 200,000 employees
- **Boeing:** Announced \$300 million investment, including training for workers

- Carpenter: Announced \$50 million investment
- **McCormick:** Announced \$1,000 bonuses for hourly employees
- **Pfizer:** Announced \$5 billion investment
- **UPS:** Announced \$12 billion investment

More than 25 million people reached with our Keeping Our Promise campaign, including key lawmakers, press and swing district voters







MARLIN STEEL WIRE PRODUCTS

Maryland's Marlin Steel Wire Products has long been a leader in its field, and because of the tax reform law that the NAM drove to passage, it plans to bring new jobs to its Baltimore facility and invest in the latest technology that will keep it ahead of the competition. Marlin Steel plans to increase the size of its staff dramatically by more than 20 percentprimarily by hiring formerly unemployed steelworkers from Baltimore.

SABEL STEEL

Sabel Steel in Montgomery, Alabama, is using benefits from the tax law to invest heavily in expanding its facilities, which means new jobs, new investment and large pay raises for most of its 230 employees across the South. Sabel Steel also plans to reinvest its tax reform savings in its business by expanding and upgrading facilities in Newnan, Georgia, and Baton Rouge, Louisiana, and adding new equipment that will make its facilities more productive and innovative.

CENTENNIAL BOLT, INC.

Centennial Bolt-a fastener company that has grown to be a leader in the Rocky Mountain region and, between it and its sister companies, employs 50 people-is planning to build a new plant in the Midwest, add new product lines, increase the size of its workforce and give out more bonuses as a result of savings and increased competitiveness from the passage of tax reform legislation. In addition, Centennial Bolt is using some of its tax savings to give back to the communitynamely, its efforts to combat homelessness in its native Denver. At the end of 2017, Centennial Bolt supported the opening of a new, 150-bed women's shelter.

"We're helping bring people in Baltimore back into the middle class. That's what this is all about. We're giving our employees the extraordinary tools they need to run circles around other countries. to make them more productive than workers in other countries."

- Drew Greenblatt, president and owner, Marlin Steel Wire Products

"We gave a raise to everyone across the board. We improved everyone's pay. We have incentives for as many workers as possible. If they meet or beat expectations, we're making sure thev're rewarded."

- Keith Sabel, president and CEO, Sabel Steel

"Tax savings aren't just for me. It's so people can have a better life. It's always been a family motto: our goal is that people will do better for themselves so they can improve their lives and take care of their own."

- Mark Cordova, president, Centennial Bolt. Inc.

AZZ INC.

AZZ of Fort Worth, Texas, is investing the available capital resulting from lower corporate taxes to fund both a multimillion-dollar facility expansion and an investment in its workforce. Because of the Tax Cuts and Jobs Act, the company plans to advance greenfield opportunities, grow its workforce by approximately 100 new employees and invest approximately \$1.75 million to fund new bonus and incentive programs for its existing employees.

MILES FIBERGLASS

Miles Fiberglass in Oregon City, Oregon, is using its tax savings to invest in its workforce and in growing its business. Not only does Miles Fiberglass plan to increase the number of employees working at its facility due to skyrocketing demand, but it also plans to increase wages substantially and re-implement long-dormant profit-sharing bonuses for its existing employees.

"There's no doubt that tax reform creates investment opportunities for AZZ. Because of the savings and the extra cash, it makes something like this viable."

- Tom Ferguson, president and CEO. AZZ Inc.





After the NAM published stories from AZZ and Miles Fiberglass, their leaders were invited to testify about tax reform on Capitol Hill.



CAMBRIDGE SECURITY SEALS

After growing from two to more than 60 employees in just seven years, Cambridge Security Seals, a Pomona, New York-based startup manufacturing company, announced that, spurred on by the improvement in the business climate due to the reduction in regulations and the benefits of tax reform, the company plans to invest \$3.65 million to expand its production capacity by up to 40 percent.

"We are investing with confidence knowing that there will be significant income tax benefits to us as we grow, and more importantly, that the tax reform law will be positively affecting our market of customers, whose growth will translate into greater demand for our products."

- Elisha Tropper, CEO, Cambridge Security Seals

Sustainability

Manufacturers are delivering responsible environmental stewardship along with strong economic growth. Earlier in 2018, the NAM joined with the Department of Energy's nonpartisan Better Plants Program to launch the Sustainability in Manufacturing Partnership. Through this partnership, manufacturers have the ability to collaborate with the Department of Energy in exploring emerging sustainability technologies and addressing future energy problems.

In a recent NAM survey,

71.9% of manufacturers said they had a sustainability policy in place.

8.3% are developing one.



93.8%

of companies track energy usage.



76.3%

of companies have a recycling program.



81.3%

of companies track water usage.

ENERGY

Global manufacturing company Ingersoll Rand recently extended its climate commitment and signed a purchasing agreement for wind power that will account for 32 percent of its U.S. electricity use. It is also starting a solar energy initiative that will soon cover 15 percent of its energy load in both China and the United States.

RECYCLING

Construction materials manufacturer USG Corporation's Rainier, Oregon, plant has a new waste reclamation system that turns job site wallboard waste back into gypsum panels. The new system allows USG Corporation to meet increased customer demand for products in postconsumer recycled content.

WATER CONSERVATION

Saint-Gobain, one of the world's largest building materials companies and manufacturer of innovative material solutions, started using a cooling tower to save water at its Riverport, Kentucky, facility in 2012. Within three years, it had eliminated water withdrawal completely from a well it had used for years (at 131 million gallons in 2012)-and sealed it up.





"Everyone wants clean water and clean air. Everyone needs a good job and an economy that delivers new opportunities and a better life. Manufacturers are proving we can deliver both."

- NAM President and CEO Jav Timmons

Manufacturers will continue to lead by minimizing their environmental footprint, reducing air emissions, conserving resources, limiting waste and producing safe products and solutions so others in the economy can do the same.

FIGHTING FOR JUSTICE





The NAM is the leading voice for manufacturers in the courts. With the help of the top legal minds in the country, we are working to defend against current challenges, protect the advances we have made and prevent future threats to our interests and our industry. At all stages, we are engaged and fighting to win.

Manufacturers' Center for Legal Action

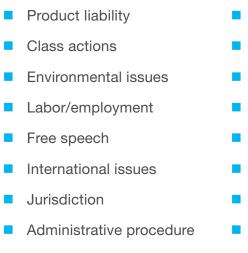
At the NAM, the Manufacturers' Center for Legal Action advances our policy objectives and safeguards the rights of our members—working to rein in regulatory overreach, protect hard-fought legislative gains and ensure a level playing field for manufacturers.

Over the past year, the MCLA waged an aggressive fight in courts throughout the country to defeat harmful laws—and won.

In the U.S. Supreme Court, the MCLA racked up major victories, including the following:

- Winning a unanimous decision involving the EPA's "Waters of the United States" rule
- Overturning a law requiring manufacturers to denigrate their own products in violation of the First Amendment
- ✓ Upholding the enforceability of employer– employee agreements to arbitrate certain claims rather than resort to high-cost and prolonged class actions
- Defeating groundless claims for retiree benefits beyond those negotiated between employers and employees in a collective bargaining agreement
- Securing manufacturers' rights to challenge federal agencies' land-use restrictions under the Endangered Species Act
- Securing review of a judicial doctrine that requires courts to essentially rubber-stamp agencies' interpretations of their own regulations

In 2018, the MCLA filed 24 briefs as a party in ongoing litigation and 68 "friend of the court" briefs on precedent-setting issues for manufacturers on a wide variety of topics, including the following:



Antitrust

The MCLA also intervened in several new significant cases in 2018. It has joined cases to defend regulatory reforms under the Clean Air Act, Clean Water Act, Toxic Substances Control Act and other environmental laws and has moved to intervene in a case to defend a workforce program that allows STEM-trained workers to continue employment in the United States.

The NAM's legal team is stronger, more knowledgeable and more comprehensive than anything I have seen at any other organization. They have stood with us by filing an amicus brief in the D.C. Circuit to help us overcome an 18-year-long legal nightmare. They have helped us comply with new and old regulations and have given us access to top-tier attorneys. They have unflinchingly demonstrated that they are committed to my company's success."

- William Bucknam, vice president and general counsel, MWI Corporation

- Arbitration
- Communications
 - Discovery
 - Expert testimony
- Insurance
 - Securities regulation
 - Preemption
- Alien tort statute

BRIEFS FILED AS A PARTY IN ONGOING LITIGATION

"FRIEND OF THE COURT" BRIEFS FILED

Victories Worldwide

The MCLA secured a major win in the European Court of Justice that protects chemical manufacturers' confidential and proprietary business information against environmental groups' push for intrusive disclosures.

LEGAL ADVISORY COUNCIL

The MCLA Legal Advisory Council provides a forum for networking, sharing best practices and discussing compliance challenges. It also provides an important avenue for NAM members to stay involved and participate in setting the MCLA agenda.

MANUFACTURERS' ACCOUNTABILITY PROJECT

Manufacturers know that special interests-including trial lawyers, public officials, deep-pocketed foundations and activists-are focused on undermining manufacturers in the United States through baseless tort litigation and taxpaverfunded, politically motivated investigations that accuse manufacturers of causing climate change. The Manufacturers' Accountability Project is setting the record straight, countering the misinformation campaigns by these special interests and protecting the ability of all manufacturers to continue to grow and provide millions of jobs to working Americans. Through an intensive campaign effort featuring regional roundtables, publications, earned media and press interviews, the MAP has rallied elected officials and the legal community against misguided litigation.

The MAP's strategic communications campaign and rapid response platform have transformed the conversation and positioned the MAP as the leading voice on these issues. Moving into 2019, the next phase of the campaign is focused on our singular goal: to deter future litigation targeting manufacturers and put an end to these public nuisance lawsuits. In partnership with the NAM's state partner associations at the local level, the MAP will continue to educate stakeholders from different industries and key locations, to host events and to amplify the message of manufacturers' contributions to a stronger economy and cleaner environment. With a proactive strategy and building on the lessons of 2018, the MAP will continue to deliver wins for manufacturers and turn the tide of baseless litigation.

Growing Membership

The MCLA grew the Legal Advisory Council by 40 percent in 2018increasing the number of company representatives in the group from 112 in 2017 to 157 today.





MANUFACTURERS: 3

For more than a year, manufacturers and manufacturing workers have been under assault by a wave of frivolous public nuisance lawsuits brought by headline-chasing politicians and trial lawyers looking for their next big payday. Manufacturers are fighting back against this abuse of our legal system—and winning. Tell the trial lawyers and politicians to keep their hands off our manufacturing jobs.

WHERE EACH CASE STANDS:

LAWSUIT	CASES IN FEDERAL COURT?	REPRESENTATION	STATUS	DATE LAWSUIT WAS FILED
San Francisco, CA	~	Hagens Berman	DISMISSED	9/19/17
Oakland, CA	~	Hagens Berman	DISMISSED	9/19/17
New York, NY	~	Hagens Berman	DISMISSED	1/9/18
San Mateo / Marin / Imperial Beach, CA	S	Sher Edling	Pending in the 9th Circuit Court of Appeals	7/17/17
Rhode Island	S	Sher Edling	Removed to Federal Court [July 16]	7/2/18
King County, WA	S	Hagens Berman	Removed to Federal Court [May 25]	5/9/18
City of Boulder / County of Boulder / San Miguel County, CO	S	Earth Rights International / The Niskanen Center / Hannon Law	Removed to Federal Court [June 29]	4/17/18
Richmond / City of Santa Cruz / County of Santa Cruz, CA	S	Sher Edling	Pending in the 9th Circuit Court of Appeals	1/22/18
Baltimore, MD	~	Sher Edling	Removed to Federal Court	7/20/18

TRIAL LAWYERS: 0





Award-Winning Support

The Association of Corporate Counsel of the National Capital Region recognized the MCI with a 2018 "In-House Innovators" Award.

MANUFACTURERS' COMPLIANCE **INSTITUTE**

Compliance issues are complicated. That's why our awardwinning Manufacturers' Compliance Institute provides legal and regulatory compliance guidance to NAM members through partnerships with top-tier law firms, giving our members free access to the best possible legal assistance as they navigate their compliance obligations.

In 2018, the MCI continued to promptly address NAM member requests for compliance assistance. The MCI also hosted five webinars that served 1,180 NAM members from 847 separate companies and 107 CMA members.

I recently had a tricky international compliance question and contacted MCI Global for help. Not only did I receive a quick response, but the advice got us headed in the right direction-all at no cost. I encourage others to take advantage of this new outstanding NAM member benefit."

- Director of development for an NAM company



NAM EHS Navigator, powered by Dakota **Software**

The MCI introduced EHS Navigator, powered by Dakota Software, to help members navigate complicated environmental, health and safety rules. Combining the expertise of regulatory professionals with powerful applicability analysis tools to identify relevant regulations, clarify requirements and help manufacturers avoid costly fines and penalties, some members have called this service "TurboTax for EHS professionals."

ADVANCING OUR WORKFORCE





ADVANCING OUR WORKFORCE

Manufacturers must attract new workers to do the jobs of the future, but we also need to train and upskill people for the jobs we have now. Through far-reaching and comprehensive programs, the NAM is making that goal a reality. The greatest challenge we have is finding the right workers. We need a cultural shift in this country so more people, including young Americans, veterans and women, aspire to careers in our industry. The NAM and The Manufacturing Institute understand this and are doing everything they can to be the industry's workforce solution and lead a movement to drive people toward careers in modern manufacturing."

- Richard Haas, president and CEO, Mahindra Automotive North America



CREATORS WANTED

The industry's campaign to enhance the perception of modern manufacturing among parents and students showcases what's achievable through modern manufacturing and spotlights the growing opportunities for rewarding, lifelong careers. Facebook, Twitter and LinkedIn have reported that "Creators Wanted" content outperforms industry averages and is driving engagement among parents and students. To date, more than 15 million people have watched parts of the series.

Be You in Manufacturing



"Be You in Manufacturing" is the latest "Creators Wanted" diversity and inclusion content series. A partnership between The Manufacturing Institute and PwC, featuring Emerson, Procter & Gamble, Caterpillar, Pfizer, STIHL, GM, Arconic, Siemens, PPG, Ingersoll Rand, Whirlpool, Mahindra, Marlin Steel Wire Products, Dold Foods, JUST and HELM Boots, it has been viewed by more than 525,000 people.









Exciting launch! Check out our latest #CreatorsWanted campaign to help close the skills gap at CreatorsWanted.org.









NAM State of Manufacturing Tour

The NAM designed our 2018 State of Manufacturing Tour to share the urgency of the workforce crisis with the country and to tell the story of modern manufacturing-because the future of the industry and the future of America depend on it.

Through 35 events in eight states, the NAM State of Manufacturing Tour focused on inspiring the next generation of the manufacturing workforce. As innovation and automation expand what American manufacturers can do, we are working to attract students to new-collar jobs that will build the America of the future. From lifesaving medicines, to lifechanging technology, to revolutionized food production methods and new approaches to sustainability, the men and women who join our workforce today will change the way we live tomorrow.

Overall, the tour generated 12 million social media conversations with key audiences, including parents, students, federal, state and local leaders and manufacturing employees.

Television and print coverage included the following:

- Bloomberg News
- CNBC
- Associated Press
- The New York Times
- The Washington Post
- Fox News
- Fox Business Network
- BBC News
- New York Post
- Politico
- Axios
- Vanity Fair

Twitter mentions included the following:

- Sen. Mitch McConnell's (R-KY) Press Office
- Sen. Susan Collins (R-ME)
- Sen. John Boozman (R-AR)
- Sen. Joe Donnelly (D-IN)
- GOP Senate Finance Committee
- House Manufacturing Caucus
- GOP House Ways and Means Committee
- Rep. Andy Barr (R-KY)
- Rep. Fred Upton (R-MI)
- Rep. Tom Reed (R-NY)
- Rep. Tim Walberg (R-MI)
- Gov. Matt Bevin (R-KY)
- Gov. Rick Snyder (R-MI)
- Steve Forbes



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Thanks @ShopFloorNAM for visiting the @Toyota plant in Georgetown, #Kentucky and for showcasing the hard-working and talented employees at the facility.

> NAM Chattaneo Dinordia first slop today is at @Toyeta's facility in Georgetown, KY A out the process that team members use to make one o most popular cers. #MFGTour2018

Rick Snyder

The Nat'l Association of Manufacturers @ShopFloorNAM is kicking off their national tour today and of course they chose Michigan as their first stop! We are leading the nation in creating & producing the technology that moves the world #MFGTour2018 #comebackstate 10(51 AM - 12 Fec 2018

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"Ultimately, the goal of manufacturing in America is to improve the human condition, and we need everybody to be focused on the success of manufacturers in America."

- NAM President and CEO Jay Timmons

NAM State of Manufacturing Tour by the Numbers

8	STATES
35	EVENTS
16	RADIO INTERVIEWS
27	TELEVISION APPEARANCES AND MENTIONS NATIONWIDE
52	ARTICLES WRITTEN
177,000	PEOPLE WATCHED TOUR EVENTS ON FACEBOOK
\$2.2 MILLION	IN FREE PRINT AND TV COVERAGE
53 MILLION	REACHED ON SOCIAL MEDIA







Career and Technical Education PERKINS CAREER AND **TECHNICAL EDUCATION ACT**

The NAM applied constant pressure to win passage of the bipartisan Strengthening Career and Technical Education for the 21st Century Act, which reauthorized the Perkins Career and Technical Education Act to support upskilling American workers. The NAM's work to organize and lead a coalition of nearly 500 business and education groups was a critical factor in the success of this legislation—a top priority for our members facing the consequences of the ongoing workforce crisis.



52

Manufacturing Institute

The Manufacturing Institute's mission is to attract, train and retain the skilled workforce manufacturers need. It drives programs and research to promote modern manufacturing and jump-start new approaches to growing manufacturing talent. Over the past year, it has taken manufacturers' efforts to address the workforce crisis to a new level, achieving new milestones for the group along the way. In partnership with some of the leading consulting firms in the country, The Manufacturing Institute studies the critical issues facing manufacturing and then applies that research to develop and identify solutions that are implemented by companies, schools, governments and organizations across the country.





Q

TheMfgInstitute @TheMfgInstitute · 1 Nov 2018 We're all in in shaping tomorrow's manufacturing workforce. @pwcus #CreatorsWanted bit.ly/2A2SFsF



17 2

0 4

Carolyn Lee @cleeNAM Manufacturing careers let you be you. Check out a new study from @TheMfgInstitute & @PwCUS on how manufacturers are ramping up diversity & inclusion programs. #CreatorsWanted bit.ly/2A2SFsF



Manufacturing Day

On October 5, manufacturers across America celebrated Manufacturing Day and kicked off a month full of exciting and inspirational events designed to recruit and inspire the next generation of skilled workers. With the assistance of State Associations Group members working collaboratively within and across states, thousands of factories and technical schools opened their doors to parents, teachers and students to show what a career in modern manufacturing has to offer. Nearly 3,000 events were held across the country-in all 50 states, Puerto Rico, Mexico and Canada-and in a sign of the growing profile of this national event, President Trump signed a presidential proclamation recognizing Manufacturing Day for the second year in a row. It was the first time that a president has issued consecutive proclamations.



Nearly 3,000 events in all 50 states, Puerto Rico, Mexico and Canada

All of the buzz and excitement generated a tremendous amount of media coverage. All told, Manufacturing Day generated more than \$2.2 million worth of free print and television coverage that reached nearly 13 million people. On social media, manufacturers reached more than 52 million people. And Manufacturing Day trended nationally on Twitter, where it was mentioned more than 20.000 times.



Manufacturing Day was started in 2012 by founding partner the Fabricators & Manufacturers Association. International.



Manufacturing Day

Superheroes aren't just for the movies. See how manufacturing heroes solve everyday challenges in this #AR comic book developed by @PTC and @ROKAutomation. Download the Smart MFG app for #MFGDay18: ptc.co/tl8A30ITcJu



Top-Tier Sponsors



#MFGDay18 Online









000 **13 million** reached in print and television



52 million reached on social media

20,000 mentions on Twitter



Presidential Proclamation on National Manufacturing Day, 2018

. . .

On National Manufacturing Day, we renew our commitment to restoring America to its rightful place as a global leader in manufacturing....Today, our country's manufacturers are more confident than ever before about investing in factories and workers right here at home."

> manufacturers and their workers have increased opportunities to grow and create jobs. Our economic policies, including the Tax Cuts and Jobs Act and the elimination of unnecessary and burdensome regulations, are delivering real results. Since my election, we have created nearly 400,000 manufacturing jobs.

10



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HEROES MAKE AMERICA

Hiring Military Veterans

Our 10-week career skills and certifications program builds a pipeline from military to manufacturing careers for transitioning service members. With its rapid expansion and with continued support from manufacturers (and significant contributions from companies like Samsung, Allergan, Koch and others supporting our veterans), Heroes is on track to have 4,000 graduates by 2021, ready to go to work at America's leading manufacturers.

TheMfgInstitute @TheMfgInstitute + 26 Dec 2018 Earlier this year, @SamsungUS made history and became a Founding Sponsor of the Heroes MAKE America program. By 2021, their investment will have helped more than 4,000 veterans across 7 U.S. military bases pursue rewarding manufacturing opportunities! bit.ly/2Q3KOnO







STEP Ahead – Women in Manufacturing

The STEP Ahead initiative, focused on the impact of women in manufacturing, highlights manufacturing jobs in science, technology, engineering and production. In 2018, more than 200 companies participated in STEP Ahead. More than 725 attended the 2018 awards event in Washington, D.C., and 700 participated in STEP Forward events held across the country. Deloitte has estimated that the program has impacted more than 300,000 women with a positive, inspiring message about modern manufacturing in the United States.







TheMfgInstitute @TheMfgInstitute + 30 Nov 2018 There's a gender gap in manufacturing. Our #STEPAhead program is working to close it by empowering women to pursue modern manufacturing careers and highlighting female leaders in the industry. bit.ly/1tK43fh



TheMfgInstitute @TheMfgInstitute + 29 Aug 2018 STEP Anead matters to me because it is so important to change the culture for future generations by allowing them to see successful women in manufacturing jobs and believe that those are jobs meant for both men and women" – Pierrette Swan, Newport News Shipbuilding = MFGKownen





Apprenticeship Task Force – Promoting Work Development

The Trump administration understands that the NAM is the foremost authority on workforce development in the United States. That's why they have sought our counsel on workforce development as they reform and expand apprenticeship programs in America. It's why they invited NAM President and CEO Jay Timmons to serve on the Labor Department's Task Force on Apprenticeship Expansion. And it's why when the White House had nine-person meetings on workforce development, the NAM was the only association at the table representing the business community. Today, the NAM's Manufacturing Institute is working with our state partners to expand apprenticeship programs in communities nationwide.







120" (3000mm) Bed +/-10 Micron Ram Tolerance 4 Axis Back Gauge Camera Guard for Safety

d 3120

132 Ton Press Brake

"Expanding apprenticeships will help Americans learn the skills they need to fill jobs that are open right now and in the future."

- Labor Secretary Alexander Acosta

"Initiatives like this task force are a great example of how the government and the business community can work together to promote and support rewarding and high-paying careers in modern manufacturing."

- NAM President and CEO Jay Timmons

ENHANCING OUR OPERATIONS



The NAM offers exclusive services to our members that help them save money, build networks, advance their policy goals and grow their bottom line. We provide access to important events, useful conversations, vital training and exciting programs. And we offer individualized support from public relations assistance to legal expertise that makes our members more influential, more efficient, more successful and better prepared for the future.

NAM members have access to all these services, and more, providing first-look entry into a groundbreaking set of new and innovative programs that keep our members at the forefront of the manufacturing industry and in control of shaping their destiny.





Board Meetings-**Convening Influential** Leaders

NAM board meetings convene some of the most influential individuals and firms in America to discuss how to move our manufacturing agenda forward together.

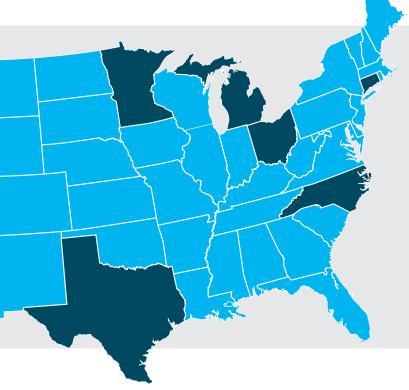


Subject: URGENT: Corporate Network Penetratio

Enhancing Our Operations

Executive Insights Series – Thought Leadership and Networking with Industry Powerhouses

The NAM's Executive Insights Series is an exclusive forum for off-the-record conversations with CEOs of the world's top manufacturing companies with a focus on the entire supply chain, providing access and singular networking for our members.





Minneapolis, MN			
Detroit, MI			
Charlotte, NC			

Houston, TX **Cleveland, OH** Hartford, CT

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Vicki Holt President and CEO Protolabs

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Nick Pinchuk Chairman and CEO Snap-on Incorporated

Mike Lamach Chairman and CEO Ingersoll Rand

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Patrick Dempsey President and CEO Barnes Group Inc.

Gregory Hayes Chairman and CEO United Technologies Corporation

HOUSTON

OMNOVA Solutions. Inc.







Manufacturing Executive Leadership Program – Planning for the Future

Two years ago, the NAM launched the Manufacturing Executive Leadership Program—a three-part program that focuses on the best techniques to engage with legislators and policymakers successfully. Participants join senior-level executives from leading domestic and global manufacturing companies who are focused on individual and organizational effectiveness.

Part One: Engagement—The NAM hosts this session at NAM headquarters in Washington, D.C., covering the nine leadership competencies and delivering instructions from our staff and expert speakers on engaging with the executive and legislative branches of the government.

Part Two: A Deeper Dive — Participants continue to build impactful leadership skills through webinars on leadership competencies and policy.

Part Three: Call to Action—Attendees participate in experiential leadership events, using the practical leadership skills combined with the government and issue advocacy knowledge gained in parts one and two.



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hnson & Johnson	
ggett & Platt, Inc.	







Mallinckrodt Pharmaceuticals Porta-King Building

Systems

ovota

Stanley Black & Decker Sukup Manufacturing



Trade Forums—Enhancing Our Knowledge

The NAM Trade Forum brings together NAM members and key trade policy figures for candid, off-the-record dialogues that provide our members with unparalleled understanding of trade issues and give them insights that will benefit their businesses and the broader manufacturing industry as a whole.







Advocacy Committees—Engaging Our Senior Professionals

In 2018, the NAM evolved the National Public Affairs Steering Committee into three new groups that will deliver added programming tailored to senior professionals at member organizations beginning in 2019. Member companies can designate participants for the Manufacturing Advocacy Council for grassroots and public affairs professionals, the Government Relations Council for government relations officials or the NAM Communicators Group for senior communications officers. The groups will hold quarterly meetings and conference calls.



NOT YOUR TYPICAL TRADE ASSOCIATION

The NAM is innovating constantly, developing new ideas and approaches that can't be found anywhere else. The NAM provides valuable, one-of-a-kind opportunities to our members through the industry's authority on Manufacturing 4.0, the Manufacturing Leadership Council, as well as our Leading Edge Thought Leadership Series and the NAM's member and business services. Thanks to these initiatives, the organization has transformed the definition of "trade association" radically while helping manufacturers shape a better future for themselves, their organizations and the industry at large.



Manufacturing Leadership Council

A few years ago, the NAM Board of Directors adopted the "2020 Vision," a transformative strategy to boost the NAM in the areas of advocacy, workforce development, legal action and operational excellence. In September 2018, as a part of that strategy, we took another major stride forward when we announced the successful acquisition of the Manufacturing Leadership Council, the world's first member-driven, global business leadership network on Manufacturing 4.0 dedicated to senior executives in the manufacturing industry.

The MLC's mission is to help senior manufacturing executives and emerging leaders define and shape a better future for themselves, their organizations and the industry at large by focusing on the intersection of critical business and technology issues that will drive growth today and in the future. Across the country, manufacturing professionals from operations, plant management, supply chain and information technology fields turn to the MLC for real-world knowledge through learning from their peers, in-depth factory tours, an annual three-day conference, webinars, a bimonthly journal, case studies and exclusive survey research on subject matters such as advanced analytics and artificial intelligence, predictive maintenance, augmented/virtual reality, collaborative robotics, additive manufacturing, current workforce digital readiness, cybersecurity, M4.0 cultures and organizational models.

MLC members enjoy access to the following:

- Manufacturing Leadership Summit: Connect with the world's top experts on M4.0.
- **Quarterly Plant Tours:** See technology in action and exchange ideas with peers to improve your operations.
- Interactive Virtual Meetings: Stay up to date on technology and trends that affect your business.

- ✓ Manufacturing Leadership Journal: Access essential intel for M4.0 from practitioners on the front lines.
- ✓ Manufacturing Leadership Awards: Earn recognition as you shape the image of manufacturing and move the industry forward.

The MLC is the first acquisition the NAM has made in modern times-because we recognize the value this service can deliver to manufacturers. But the MLC doesn't only represent a unique opportunity. It is also a demonstration of our commitment to strategic growth that supports the industry as it stands today - and prepares manufacturers to succeed tomorrow. Join today at MLCouncil.com.



Todd Boppell Manufacturers



LEADERSHIP COU **Enhancing Our Operations** NATIONAL ASSOCIATION OF MANUFACTURERS

Chief Operating Officer National Association of

David Brousell Vice President an **Executive** Directo Manufacturing Le Council /7

Leading Edge

Leading Edge is an exclusive thought leadership program that convenes executives from companies of all sizes along with leading business luminaries to focus on emerging business issues and trends that are impacting manufacturing today. Through this program, the NAM provides the latest perspectives on mission-critical topics that are crucial to our members' policy goals.



NATIONAL ASSOCIATION OF MANUFACTURERS

INTERNET

The NAM's loT

content track

highlights how

are transforming

competition and

companies and

covers the impacts

of IoT across the

complete product

lifecycle.

connected products

OF THINGS

SUSTAINABILITY

The NAM's programming highlights how sustainability can be a driver for next-

more efficient

of employees.

operations and

The NAM's programming content is centered around driving success through an improved generation products, supply chain strategy and innovative approach to supplier increased profitability relationships. as well as capturing the hearts and minds

SUPPLY CHAIN

CYBERSECURITY

The NAM explains how to assess and manage risks associated with increasing digitized processes and products.

GROWTH The NAM helps

participants discover trends and changes that impact workforce talent and the intersection with technology.



Featured Speakers

INTERNET OF THINGS

Jim Heppelmann, CEO, PTC

CYBERSECURITY

- Mark Sangster, Vice President, Strategic Marketing, eSentire
- Rik Boren, Cybersecurity Specialist, Partner, PwC
- Joe Nocera. Financial Services Cybersecurity Practice Lead, PwC
- Gene Sun, CISO, FedEx
- **Sarah Urbanowicz,** Chief Information Security Officer, AECOM

GROWTH

- Ulrich Spiesshofer, CEO, ABB
- Marc Benioff, CEO, Salesforce

AMERICA MAKE AMERICA MANUFACTURERS N. MAKE RICA www.nam.org MANUFACTUR IRERS MA **NE** AMER



Learn more about Leading Edge at thoughtleadership.nam.org.





THANKS TO OUR **2018 PARTNERS** FOR SPONSORING **OUR PAID CONTENT AND MAKING THIS** PROGRAMMING **POSSIBLE!**



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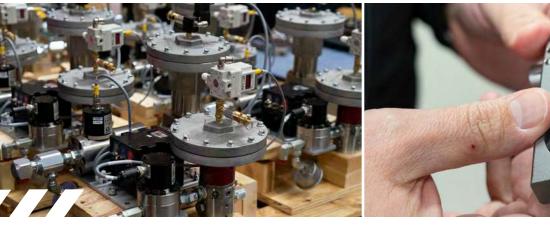


Manufacturers Marketplace

The Manufacturers Marketplace is a game-changer that allows members to tap into a world of hundreds of thousands of manufacturers. Within seconds, you can find companies perfectly suited to fill your needs, or have your business discovered in unique, specific ways by potential business partners. Whether you need to find or be found, the Manufacturers Marketplace can pair you up with the right manufacturing partner in the United States quickly and effortlessly.

With hundreds of thousands of leading manufacturers in America listed in the marketplace, representing small and large manufacturers in every industrial sector across all 50 states and Puerto Rico, this exclusive product from the NAM and leading state manufacturing associations across the country offers a comprehensive search capability to help manufacturers identify and engage with the right partner.





For Buyers

Finding exactly the right partner enables companies to compete more cost-effectively. Our advanced search functionality lets manufacturers discover companies based on their unique capabilities.

For Sellers

Manufacturers can be found by the right partners using a variety of highly specific search options-locations, processes, certifications, plant size, equipment, capacity, NAICS, SIC and many more.

Manufacturers Marketplace

As the official marketplace of the NAM and leading state manufacturing association partners, the Manufacturers Marketplace is the most advanced buyer/seller digital network in America.







Logistics is a key component for any manufacturing operation. The NAM has a dedicated shipping point of contact to assist our members with a variety of endorsed shipping solutions, covering small parcel, less than load, truckload and air-freight shipments. Members can utilize this resource to enroll in the NAM shipping discount programs, verify current rates, run quotes, book shipments and get details on alternative financing for importers.

NAM Energy Program Powered by APPI Energy

Manufacturers consume one-third of all energy in the United States, which presents a significant opportunity to reduce operating costs. Created in partnership with experts at APPI Energy, the NAM Energy Program draws on the expertise of the knowledgeable, unbiased specialists at APPI Energy to help manufacturers make sure they get the best energy supplier contracts possible-all at no additional cost.



The new Incentives Locator tool, powered by Atlas Insight, helps our members navigate the complex world of incentives and site selection to improve their bottom line. We help members reduce operating costs, manage compliance, access cost-competitive data and claim their share of the \$80 billion in incentives U.S. government agencies award every year to attract, grow and retain business investment.

Facility Visits and Tours

At the NAM, we believe in making our case aggressively, persuasively and personally. That's why the NAM and our regional public affairs team help to coordinate facility visits and plant tours for you, your members of Congress and their staff to help build relationships for your company and increase support for the manufacturing agenda.

Learn more at www.manufacturersmarketplace.us.

NAM Shipping

NAM Incentives Locator

Manufacturers' Public **Relations Team**

At the NAM, we are manufacturers' advocates, business partners and public relations agency. In an environment often described as disruptive, the NAM has been able to adapt to a changing landscape and stay at the forefront of advocacy to support our members and promote their priorities. When we talk about issues that matter to manufacturers, people listen-and our members benefit.

That's because the NAM's communications and brand strategy team isn't just a communications team at a business trade group—we are a full-scale public relations firm invested in the success of manufacturers in the United States. We have demonstrated time and again that at every level-from brand reputation, to public relations, to crisis communications and issue-driven effortsthe NAM delivers a combination of strategic expertise and inside knowledge that no agency or organization can match. That's why we can navigate the current environment in a way that sets trends and leads.

11 You Retweeted Yahoo Finance 😋 @YahooFinance - 13 Nov 2018 Highlight: "Manufacturers will say ... that tariffs are never good for an economy and that trade wars never benefit anyone," @JayTimmonsNAM says. "This administration, though, ... has decided that they're tired of China not playing by the rules," yhoo,it/2QyB81C #YahooAMS VAHOGAMS WHEN ALEXCEPTIMANCE PERM





Engaging the Media

The NAM provides our member companies with a best-in-class national media platform, arming them with the tools they need to tell their stories effectively and to ensure those stories cut through the media's noise. By providing effective, guided access to local and national media, the NAM gives manufacturing leaders the opportunity to drive the news and share dynamic content in forums and avenues that would otherwise be out of reach. And with our specialized knowledge of the manufacturing industry, we know exactly how and where to engage to get the best bang for your buck.

At the NAM, we deliver the following:



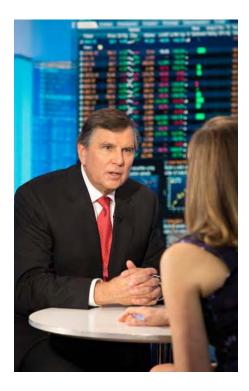
MEDIA TRAINING 101

The NAM's communications team is made up of professionals with decades of experience at the highest levels of business and politics. Let the experts on our team help you master the art of the media interview so you can ensure your message breaks through at every opportunity.

INTRODUCTIONS TO THE MEDIA

The NAM works with dozens of local and national print, television, radio and online news reporters daily. If there are reporters you would like to meet. let us know. We'll be happy to facilitate introductions and help you build or strengthen your key relationships with the press.

- Social media growth
- NAM publication features
- ✓ Media training



MEDIA **OPPORTUNITIES**

Members of the media often turn to the NAM to find executives and spokespeople to respond to breaking news and give commentary. If senior executives in your company are willing to speak to the media on priority issues, we'll pass these opportunities along.





Telling Your Story

Telling an effective story doesn't just happen in Washington—it happens in communities around the country. The NAM offers a first-class operation that will help you find your best message and get it out to the people who need to hear it most.

BRAND EXPOSURE

The NAM has worked with many of our members to enhance their brand reputation and awareness through earned media opportunities; stories on our site; amplification on our digital platforms; Input, our email newsletter for manufacturing executives; and our advertising and digital campaign, "Creators Wanted." These NAM-exclusive platforms routinely earn positive social engagement from the president and Congress and reach a powerful audience of manufacturing executives, Washington lawmakers, influential policy advisers and key media.

The NAM has also worked with many of our members to secure and execute high-profile visits from President Trump, top Cabinet officials and other key leaders. Not only did this help shape the discussion around key policy issues like tax reform, but it also positioned the companies positively in regional and national media.

EXECUTIVE COMMUNICATIONS

Whether manufacturers need to speak to our allies or our critics, the NAM message development team knows how to communicate to them effectively and goes to work to help member companies and executives define their message and make compelling arguments for action.

ADVERTISING

Weaving messaging into campaigns that advance the brand goals of our member companies and promote public policy objectives is what we do. Our team specializes in digital storytelling, media production and strategy, filmmaking and motion graphics to craft campaigns that are data driven, innovative and compelling.





Honored with PR News' Top Women in PR Award:

NAM Senior Vice President of Communications and Brand Strategy Erin Streeter



In 2018, the NAM unveiled Input, a new morning-read newsletter tailored for manufacturing leaders with top takes on the industry, politics and policy. The NAM previewed the publication, created in house at the NAM, in December ahead of its official January 2019 launch.



PHOTOGRAPHY

The communications landscape is changing, and the NAM is changing with it. Sometimes a photograph can convey a message more powerfully than any spoken or written word. Led by a former White House photographer and Los Angeles Times photojournalist, our team will capture the right images at the right moment to provide the compelling edge your company needs—and we will find the best possible placement to tell your story.

SOCIAL MEDIA CONTENT

The NAM uses numerous media subscriptions and monitoring tools to follow manufacturing news online, in print, on the radio and in local television outlets. Our team can share best practices and tips on social media and help you obtain the content you need to be a thought leader in manufacturing.



Premier Sponsors—The Key to NAM Programming Success

NAM sponsors provide our membership with thought-provoking content and innovative manufacturing business solutions. The NAM's 2018 sponsors helped our members develop new opportunities in a disruptive environment, stay current on the latest technologies and gain valuable insights on emerging trends. We recognize and greatly appreciate the strong NAM members that stepped up to work with us as partners in 2018 and look forward to continuing our successful relationships.

OPERATIONAL PROGRAMMING: LEADING EDGE

Supporting manufacturers by providing original content and thought leadership resources, to address the most pressing challenges facing manufacturers today



MANUFACTURING DAY

Shaping the next generation of manufacturing leaders BiaCommerce Fabricators & Manufacturers Association, International PTC **TourGuide Solutions** Ariel CooperStandard Harley-Davidson Pepsico Plastics Industry Association Samsung Walmart ABB Ballard Spahr Kronos National Wooden Pallet & Container Association

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NAM ANNUAL PARTNERS

Supporting NAM programming and events throughout the year

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CREATORS WANTED

Mahindra Pfizer Inc.



FORWARD

The past year has been one of rapid change, complex challenges and incredible progress. While changing circumstances and evolving landscapes have posed a challenge to trade associations nationwide, the NAM has forged ahead without missing a beat-and kept our promises with every step.

Whether we're advocating in the halls of power or arguing in a court of law-and whether we're attracting new employees or offering new membership opportunities-the NAM has always been willing to defy conventional wisdom, break out of the traditional association mold and chart our own path through an unprecedented political landscape. And over the past year, we've seen once again that the NAM is well-positioned to capitalize on our strength and double down on our success, ensuring that we can grow and expand our work in the years to come.

The association closes out 2018 with record membership growth, unrivaled brand strength and high member satisfaction – serving as an example to our peers and an unparalleled investment for our members. Going forward, we will continue to navigate the thorniest of issues. We will ensure that manufacturers continue to have a seat at the table in every conversation in every room. And we will deliver the unbeatable value that manufacturers expect and deserve.

ISSUES INDEX

Tax	21, 22, 30, 31, 32, 33
Trade	24, 25, 72
Energy	23, 35
Environment	34, 35
Transportation and Infrastructure	26
Labor	29
Immigration	29
Workforce	46–63
Health Care	27
Research, Innovation and Techno	logy 27, 74, 75, 76
Regulatory and Legal Reform 18	5, 23, 28, 38, 39, 40, 41

