



FORGING INDUSTRY ASSOCIATION / Committee Meeting Record

MARKETING COMMITTEE

Date Held: June 9, 2009
Time Started: 8:30 a.m.
Time Adjourned: 11:30 p.m.
Place of Meeting: Hyatt Regency O'Hare
 Rosemont, IL

PURPOSE OF MEETING - AGENDA

- 1) Welcome and announcements
- 2) Minutes approved
- 3) General business update and concerns
- 4) 2009 Marketing Workshop logistics
- 5) 2009 Marketing Workshop topics
- 6) Update trademark list
- 7) New Economic Overview on Web
- 8) FIA website usage stat review
- 9) Statistical review subcommittee
- 10) HTC changes per AISI Steel Rod and Bar
- 11) FDMC project update
- 12) International focus on Benchmark survey
- 13) Trade Shows for 2009-10
- 14) Tech. Roadmap Marketing challenges; actions

Next Meeting, September 29, 2009
Grand Geneva Resort, Lake Geneva, WI

PRES ABS.

Kathy Shumsky, Electralloy CHAIR	X	
Mike Kamnikar, Ellwood Group, Inc. EX-OFFICIO		X
Jason Artner, Scot Forge	X	
Denis Benetti, Vulbruna Slater Stainless	X	
Bob Buss, Milwaukee Forge	X	
Artemio Cuellar, FRISA	X	
Kelly Daniel, A. Finkl & Sons	X	
Carl Dirks, Jorgensen Forge	X	
Nancy Eisenman, Lakeview Forge	X	
Greg Fitzgerald, Portland Forge		X
Kevin Gilbank, Patriot Forge	X	
Gary Hatton, Ellwood City Forge	X	
Bob Hirsh, Erie Press Systems		X
Chuck Hopper, Composite Forging	X	
Jim Kaniecki, Ellwood National Forge	X	
Dustin Kirby, Weld Mold Co.	X	
Mike Klein, Turnkey Forging		X
Glenn Larson, C.E. Larson & Sons	X	
Shawn O'Brien, McInnes Rolled Rings	X	
LeAnn Rhoades, Meadville Forging	X	

DISTRIBUTION:
 FIA Marketing Committee

OTHERS PRESENT:
 Don Farley, FIA

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Item 1: Chairwoman Shumsky called the meeting to order and introduced Jason Artner as the new Committee Chair for 2009-2010. Mike Kamnikar (not present) was introduced as the new Committee Ex-Officio for the same Committee year.

Item 2: The minutes of the March 10, 2009 meeting were reviewed and approved.

Item 3: Following a staff reminder concerning FIA's antitrust compliance guidelines, the Committee held a Business Roundtable during which attendees discussed their general perception of current business conditions, general business concerns and their overall outlook for the future.

Item 4: The 2009 FIA Marketing Workshop will be at the Grand Geneva Resort in Lake Geneva, WI, September 29-30. The resort is about one hour from Milwaukee and 90 minutes from Chicago. There is pre-arranged ground transportation, but it is prohibitively expensive (\$300 roundtrip minimum.).

The Committee agreed to a dinner cruise the evening of September 29. It will include beer and wine only and light hours courses. The cost for said function will be built into the overall meeting fee. The resort will reserve a shuttle to take the group down to the Lake Geneva loading dock 30 at a time.

Item 5: The final schedule for the 2009 Marketing Workshop was set as follows:

Monday, September 28

- 12:30 p.m. Optional Golf Outing – The Highlands Course, Grand Geneva Resort
(About 6 foursomes expected.)
- 7:30 p.m. Optional Committee Dinner at Grand Geneva Chop House private room.

Tuesday, September 29

- 8:00 a.m. Committee Meeting
- 11:30 a.m. Lunch
- 12:30 p.m. Garrison Wynn – "Making the Most of Difficult Situations - Changing Markets; Changing Times"
- 2:00 p.m. Mike Hogan, Oil States Industries – "Oil & Gas Industry Market Report"
(What we can expect from oil and gas market over next 5 years.)
- 2:20 p.m. Jon Tirpak, FDIC – Forging Defense Mfg. Consortium Customer Project Updates
- 2:50 p.m. Break
- 3:10 p.m. Timken Corp. – "Outlook for Steel"
- 3:30 p.m. SVM E-Business Solutions - "How to Market Smart in a Down Economy"
- 5:00 p.m. Adjourn
- 5:20 – 6:00 Hotel shuttles to Grand Geneva Lake Cruise –
(Grand Belle (large) and Duchess (small) were selected as the FIA preferred boats.)
- 5:30 – 6:00 Boat open but docked
- 6:00- 7:30 Cruise

Wednesday, September 30

- 7:30 a.m. Continental Breakfast
- 8:00 a.m. Tim Parenti, Crestcom – "Attitude: Impact on Sales"
- 9:00 a.m. Tim Parenti, Crestcom – "Face to Face Selling"
- 10:00 a.m. Break (check out)
- 10:30 – 12:30 Ken Kremer, Global Insight – "Forging Customer Market Forecast"

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Item 6: The Committee reviewed a list of forging company trademarks from 1972. Staff informed them that customers had contacted them occasionally seeking trademark identification and therefore consulted said list. However, staff mentioned it seemed sought trademarks were rarely listed. After debating the payback of expending time updating such a list, it was agreed not to at this time. It was mentioned most customers are asking for older trademarks – many from defunct companies, so an updated list would be of little use anyway.

Item 7: The Committee was informed of a new series of economic comments and updates provided by Dr. Ken Mayland of Clearview Economics – a regular speaker at the FIA Annual Meeting. These comments and updates are posted under the "market forecast" section of the FIA website and will continue to be for one year. The membership was and will continue to be notified of such availability via Quick Read.

Item 8: The FIA website user statistics for May 2009 were reviewed. A high of 69,700 visitors were logged. FIA has been averaging about 60,000 users a month. Forging Facts continues to be the top page visited.

Item 9: At the request of new Ex-Officio **Mike Kamnikar**, the Committee was asked of its interest in supplying subcommittee members to help re-think FIA's Annual Orders & Shipments (O&S) reports in order to add more value for participants. Adding new markets such as wind power was one topic to be discussed. Reporting weight vs. dollars, and market by material are two topics long in debate. However, the Committee cited the need for more information before deciding who from their companies or the Committee should sit on said sub-committee. Staff was asked to e-mail all appropriate survey questionnaires and reports in advance of next meeting – if possible. The Committee will then report back at next meeting with names of volunteers.

O&S manager and staff member **Diane Rothaermel** has asked to serve on the Committee. **Carl Dirks** has already volunteered to sit on subcommittee.

Item 10: The American Iron and Steel Institute's Rod and Bar Group recently succeeded in amending the Harmonized Tariff Schedules via the USITC to include eight additional forged imports. Samples of the reporting forms were distributed to members at today's meeting. However, interpreting what they really say, was difficult at best. At the next meeting, Kevin Gilbank will supply a copy of his NAFTA certification forms for further explanation of HTC categories/numbers. **Artner, Gilbank** and **Shumsky** also offered to take the reporting forms back to the experts at their plants to help interpret them.

Item 11: The major customer-oriented projects underway by the forging Defense Manufacturing Consortium (FDMC) were quickly reviewed by staff. At FDMC's request, they will be fully explained and demonstrated at the FIA Marketing Workshop September 29.

Item 12: The Committee was shown the results of a survey conducted by the Precision Metalforming Association (PMA) in conjunction with its marketing benchmarking survey. The topic: international business – subjective questions on imports and exports and how they are impacting business. The Committee was interested in trying such a survey with FIA members, but suggested adding some questions (**Kathy Shumsky** will send **Don Farley** a list of these questions), and running it as a separate survey from the Marketing Benchmarking Survey – not due for another 2.5 years. Staff will look into combining said survey with the revised annual survey discussed in **Item 9** above.

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Item 13: After much discussion about trade shows in general, and power generation-oriented shows specifically, the Committee decided to recommend FIA exhibit at the Power-Gen International Show, December 8-10, 2009 at the Las Vegas Convention Center. It was mentioned that this show encompasses wind power, nuclear as well as all other types of power generation systems and equipment, and has a international appeal for attendees and exhibitors – traits sought after by the Committee.

Because there is so much market potential in power generation across the three forging processes, it was decided to hold the December Committee meeting on December 7, just prior to the Power-Gen Show in Las Vegas. Several members can then stay on to walk the show and help staff the FIA booth. A preliminary list of volunteers includes **Artner, Daniel, Kaniecki, Dirks, O'Brien** and **Hopper**. Others will be asked again if interested via e-mail at a later date.

Item 14: At the last meeting, the Committee reviewed the Forging Industry Technology Roadmap 2008 Update, developed during a 2008 meeting of Industry CEO's and top level managers. The Committee focused on the Marketing issues, comments, recommendations and challenges that came out of that report. It was agreed it may take several meetings to adequately address issues raised, and time did not permit so at this meeting.

Next Meeting:

The next meeting of the FIA Marketing Committee will be **Tuesday, September 29 at the Grand Geneva Resort in Lake Geneva, WI at 8:00 a.m.** A group dinner at the Grand Geneva Chop House the evening before is likely.

No other business was transacted.

/s/ Donald J. Farley
Director of Marketing

THESE MINUTES HAVE BEEN APPROVED BY LEGAL COUNSEL.