The recent Coronavirus outbreak is causing significant problems for foundries. Many foundries use the N95 dust mask as part of their personal protective equipment (PPE) programs. Since the outbreak, N95 respirators are virtually unavailable due primarily to the fact that the general public has bought all available inventory in hopes of protecting themselves from the virus. As a result, foundries have found themselves without the required supplies of N95 respirators that they need to continue operations.

NFFS has contacted nearly every major supplier in the country trying to secure a source for the N95s on behalf of the industry, with no success. We have learned that additional supplies of the N95s are at least 60 days out, and that first responders will be given priority access to these supplies when they become available. It is likely that your foundry may not be able to secure supplies of the N95s for at least the next 2-3 months as a result.

If your foundry is requiring the use of N95 respirators but cannot get adequate supplies, there are options available. These include using other respirators, such as an N100 half-face respirator with cartridges, or using a powered air purifying respirator (PAPR) as a replacement. This will require, of course, fit testing the employee with the new respirator and continuing the employee's participation in the medical surveillance program.

If your employees are voluntarily using the N95 masks, you have options as well. The first option is to consider offering the employee an N100 or other type of respirator, such as a PAPR. The employee still needs to be fit tested and now must also be placed in the medical surveillance program in this circumstance. The other option is to advise employees that the N95s are not available, and until the company can secure additional supplies, no dust mask is available for their use. Employees may be offered the opportunity to bring in their own NIOSH approved N95 masks, if they can find them for purchase or have a supply of their own.

Given the industry wide impact and the rapid emergence of this issue, NFFS will be hosting a special webinar reviewing respirator program requirements, with specific content addressing fit testing and medical surveillance requirements, next Tuesday, March 10, 2020, at 2:00 p.m. ET.

NOTE: In order to accommodate this time-sensitive issue, the previously planned NFFSummit Webinar on Hazardous Chemical Inventories has been moved to Tuesday, April 14, 2020 at 2:00 p.m. ET. Register to attend either webinar at www.nffs.org.

Finally, please call NFFS if you have any questions about N95s and respirator use in your foundry. As always, we are here to help and just a phone call away.
NFFS Releases New Modernized Website

After months of preparation and hard work, the Non-Ferrous Founders’ Society is thrilled to announce the launch of a new, redesigned NFFS website at www.nffs.org. The site features a variety of important new features and enhancements including:

• **Mobile-friendly design.** Needless to say, it is a mobile world, and our previous website was not fully on board with the needs of the modern user. The new site features a fully responsive design for ease of use on any device.

• **Enhanced EHS resources.** The new website compiles a significant amount of valuable content on a wide variety of foundry related topics, including content that was not available through the previous website.

• **Automation.** Gone are the days of printing and mailing invoices and other correspondence. The new website can process new memberships and renewals, issue reminders and alerts, e-mail requested information, and more, without staff initiation. That means better, more timely information for you, and more time for the NFFS staff to focus on important issues.

> “The goal of our new website is to provide visitors with easy access to comprehensive, up-to-date information about the foundry industry and the Society's programs and services,” said Erin Russell, Director of Membership and Communications for the Society. “We knew that it was important for the site's navigation to be intuitive and user-friendly, so we put a great deal of thought into the layout and location of the information contained in the site.”

Watch for information about additional website features that are planned for release in the coming weeks. If you have questions or feedback regarding the new NFFS website, or if you need assistance locating specific information, you can always call us at (847) 299-0950 or e-mail us at info@nffs.org and we will be glad to help.

How to Create an Account at the New NFFS Website

All NFFS member employees will need to set new login credentials for the new NFFS website. This is necessary to access member content and to register for events or webinars. To do so:

1. Go to www.nffs.org and click **Sign In** at the top of the screen.
2. Click the link that says **Forgot Username?** under the Sign In button.
3. Enter your e-mail, and click **Submit**.
4. If you had an account at the old NFFS website, you will receive an e-mail containing your username. Click the link in your email to return to nffs.org and create your new password.
5. If the e-mail states that a username could not be found, click the link in the e-mail to create a new account.

To view your profile page, click your name at the top of the screen. The information in your record is what we were able to transfer from our previous records. You now have an opportunity to make additions or corrections. If you have questions about the new system or your account, call us at (847) 299-0950.
NFFS’ Sheila Rayburn to Present at 2020 Casting Congress

Sheila Rayburn, ICON Program Manager for the Non-Ferrous Founders’ Society, will be presenting at Metalcasting Congress 2020, the American Foundry Society’s annual conference and trade show, to be held at the Huntington Convention Center in Cleveland, Ohio, on April 21-23, 2020.

Sheilawill speak on Thursday, April 23, 2020, from 9:15 -10:15 a.m. A description of her presentation, “The Integrated Casting Ordering Network (ICON): Connecting Foundries with Defense Casting Opportunities,” is below:

The ICON portal is a unique partnership between Defense Logistics Agency (DLA) and the foundry industry. ICON provides a procurement solution to buyers responsible for acquiring castings needed by our defense and military customers, domestic foundries and die casters. ICON is a web-based resource created to simplify the procurement process for cast parts by leveraging the integration of the largest database of existing, defense-related tooling, a casting supplier database of foundries that manufacture parts for the defense industry, and a solicitation review process to identify government procurements for cast components and direct them to capable metalcasting facilities. The ultimate goal is to assist DLA in the re-establishment of some of the diminished availability of supply chain parts. The program has made a major contribution to reducing administrative and production lead times and in acquiring needed metal castings.

For more information about Metalcasting Congress 2020, visit www.afsinc.org. For information about ICON, contact Sheila Rayburn at (847) 299-0950 or sheila@nffs.org.

NFFS Membership Ratifies Revision to Society Bylaws

On Monday, February 10, 2020, the NFFS membership ratified the new revision to the operating bylaws for the Society. The new bylaws are the result of many months of efforts by the Society’s Bylaws Committee in cooperation with the NFFS Board of Directors.

The primary purpose of the revision is to modernize the bylaws, clearly define voting authorities for different categories of NFFS members, and to generally simplify the language to make the document easier to understand. The membership vote was unanimous in support of adopting the bylaws revision as presented, with no objections. NFFS would like to thank the Bylaws Committee and the Board of Directors for their leadership on this issue, and would also like to thank each of the NFFS members who cast a ballot on the bylaws referendum.

A copy of the new NFFS bylaws is available on the NFFS website at www.nffs.org/bylaws.

CALLING ALL FEF ALUMNI!

Reconnect, reminisce, and recall those great stories from college with your classmates at Metalcasting Congress 2020.

Don’t just ruminate – participate and reflect on those great times:

• Join us at the FEF Alumni Ambassador Reception & Bowl – April 20th 7 pm – 9 pm – The Corner Alley
• Sign-up to be a sponsor for the FEF Student Scavenger Hunt: Use QR code to sign-up.
• Recruit and meet current FEF students FEF BOOTH #215
  • Update your Alumni Information
  • Make a Giving Tuesday Pledge

www.fefinc.org | 847-490-9200

Support the NFFS Scholarship Fund

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www.nffs.org/scholarship
Highlights of the 2020 NFFS Industry Executive Conference

The 2020 NFFS Industry Executive Conference and Annual Meeting took place last month at Saddlebrook Resort near Tampa, Florida. See photographs from some of the event's highlights below.

The newly-elected 2020 NFFS Board of Directors holds its winter meeting.

A beautiful Florida sunset greets NFFS conference attendees.

Lala Romero enjoys an educational session on the first morning of the Industry Executive Conference.

Conference attendees learn how to approach marijuana policy in the workplace from former judge Jodi Switalski.

Outgoing NFFS President Chris Shanks and spouse Sheri Shanks receive a special gift painted by Tim Decker.

Jason Mugford and Chris Shanks participate in the 2020 Founders’ Classic Golf Tournament.

Chuck and Debbie Horvath navigate a ropes course.
2020-21 NFFS President Jay Armstrong greets attendees at the Closing Dinner.

Andrew Iannettoni speaks with Charlie Vivian of Inductotherm Corporation at the Tabletop Exhibition.

Hunter Lott delivers HR advice with a dose of humor.

Conference attendees meet the animals of the African savannah at Busch Gardens.

George and Feng Westhoff get into the spirit at the NFFSocial “Glow Event.”

The Welcome Reception features food and drink pairings in a beautiful outdoor setting.

NFFS conference attendees and staff members gather for an informal dinner at Saddlebrook Resort.
MACROECONOMIC OUTLOOK

Annual U.S. Industrial Production declined in December, ending the year just above the 2018 level. Activity will decline further into the middle of 2020 before rise takes hold and persists into the first half of 2022. Production will subsequently decline through the latter half of 2022.

Annual U.S. Electric and Gas Utilities Production and annual U.S. Total Manufacturing Production, two of the three major segments of U.S. Industrial Production, are below their respective year-ago levels. Conversely, activity in U.S. Mining Production, the third major segment of U.S. Industrial Production, is rising. Growth in Mining Production will slow into the middle of this year, but the segment will likely avoid recession during this business cycle.

Several macroeconomic leading indicators support our expectation for U.S. Industrial Production business cycle decline into the middle of this year. Our analysis of trends in the U.S. Total Industry Capacity Utilization Rate suggests that there may be excess capacity in the industrial sector at this time; decline in business-to-business activity, as measured by US Nondefense Capital Goods New Orders (excluding aircraft), is expected to persist into mid-2020. U.S. Domestic Corporate Cash Holdings are slowing, which could further limit business investment in the near term.

However, remember that decline in the U.S. industrial sector is temporary. Leading indicators – ranging from our own ITR Leading Indicator™ to the US ISM PMI (Purchasing Managers Index) to the OECD’s US Leading Indicator – signal that positive business cycle momentum is coming. Lead with optimism, as we expect that growth will return for U.S. Industrial Production in the second half of this year. Consider using pessimism to your advantage by making opportunistic acquisitions of capital equipment at the bottom of the business cycle. This will better position you to capitalize on growth starting in the latter half of 2020 and extending through mid-2022. Keep in mind that increasing inflationary pressures will come with the positive shift in the business cycle. Look to lock in costs, such as interest rates, raw material inputs, and wages, to the extent you are able before a stronger economy drives up prices more rapidly in 2021.

ITR ECONOMICS’ LONG-TERM VIEW


LEADING INDICATOR SNAPSHOT

<table>
<thead>
<tr>
<th>ITR Leading Indicator™</th>
<th>1Q20</th>
<th>2Q20</th>
<th>3Q20</th>
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</thead>
<tbody>
<tr>
<td>ITR Retail Sales Leading Indicator™</td>
<td>red</td>
<td>red</td>
<td>green</td>
</tr>
<tr>
<td>The Conference Board's U.S. Leading Indicator</td>
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<td>red</td>
<td>n/a</td>
</tr>
<tr>
<td>U.S. ISM PMI (Purchasing Managers Index)</td>
<td>red</td>
<td>red</td>
<td>green</td>
</tr>
<tr>
<td>U.S. Total Industry Capacity Utilization Rate</td>
<td>green</td>
<td>red</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Green denotes that the indicator signals cyclical rise for the economy in the given quarter. Red denotes the opposite.

MAKE YOUR MOVE™

U.S. Industrial Production will grow during the second half of 2020. Prepare for this rise by focusing on hiring, training, and retention. This will help you avoid quality control problems or capacity constraints as economic momentum builds during the second half of the year.

• The Conference Board’s U.S. Leading Indicator suggests further cyclical decline for U.S. Industrial Production into at least mid-2020.
• The ITR Leading Indicator™ is in its third month of rise. This supports our outlook for business cycle rise in U.S. Industrial Production beginning in the second half of 2020.
• The U.S. ISM PMI (Purchasing Managers Index) rate-of-change is rising, providing further evidence in support of our US industrial sector outlook.
INDUSTRY ECONOMIC ADVISOR

FEBRUARY 2020 —— VOLUME 50 —— Published Monthly by ITR Economics™ for NFFS Members

A CLOSER LOOK: U.S. Economy

Data-Based Reality
By: Alan Beaulieu

What you need to know: Data informs reality and beats perception every day of the week when it comes to making the right business decisions to maximize profits.

U.S. Real Gross Domestic Product (GDP) growth is slowing, with the exception of a 0.2–percentage point tick-up in the rate of growth based on fourth-quarter-2019 data. That is a reality based on data published by the Bureau of Economic Analysis. This is despite the voices in the public space saying that the economy is “booming.” Data informs reality and beats perception every day of the week when it comes to making the right business decisions to maximize profits. That same data-based reality can be applied to two other items – the coronavirus and U.S. Nondefense Capital Goods New Orders (without aircraft).

There is a lot of fear about global economic growth surrounding the China-based outbreak of the coronavirus and its subsequent leakage into other parts of the world. The World Health Organization (WHO) does not rate the outbreak as a pandemic due to the modest size of the spread of the virus. That doesn't stop the perception that there is reason to worry about the Chinese and global economies in 2020 and perhaps the long-forecasted second-half-2020 U.S. and global economic recovery. The data strongly suggests that the economic fears are overblown, according to an analysis of the 2003 SARS pandemic.

The China-based outbreak of SARS occurred in early 2003. China notified the WHO about the spread of the virus in February 2003, and the WHO declared a global alert in March 2003. The data shows that China and the global economies were not adversely impacted in their respective trends despite the SARS-related fears at the time. The economies we are talking about here are complex, big, and not easily knocked off trend unless something truly epic occurs beyond the human tragedy of the times.

1. China's stock market was already in decline in the second half of 2002, and the drop extended until the middle of 2003. The stock market problems predated SARS and were not a result of that outbreak. Rather, the market rebounded in late 2003 despite the early-2003 fears.
2. China's Industrial Production Index stalled in February and March of 2003. This may have been related to SARS, but it is hard to be sure. The quarterly average stalled, but it is normal for the quarterly Production figures to dip early in the year due to seasonality. Further, the Production annual growth rate rose throughout 2003. If there was an impact on China's Industrial Production Index, it was very mild and very short-lived.

We understand the concerns that arise during periods such as this, but the probability is that even with the reality of attempting to isolate the coronavirus outbreak, the resulting economic impact will be microeconomic in scope. We will continue to monitor the situation and trends very closely, and, in the event it becomes necessary, consider some adjustments to our thinking/forecasts.

The economic trends are also not as dire as some other “public voices” say. Our last perception/reality reference pertains to U.S. Nondefense Capital Goods New Orders (without aircraft), a good measure of business-to-business spending on capital goods. The data is showing that the quarterly rate-of-change is rising off a tentative October 2019 low. This rise points to a stronger business environment in the second half of 2020, as we have been forecasting. There are businesses in this space dealing with some angst at this time. The quarterly rate-of-change is providing a good data point in support of a better New Orders environment as the year progresses. Use rate-of-change methodology for your own firm to separate perception from reality. Doing that, and tying it in with the leading indicators you see in the Advisor™, makes it possible to know with a high degree of confidence what the future holds for your firm. That in turn gives leaders time to enact profit-enhancing plans.

To view the full February 2020 Industry Economic Advisor, log in and go to: www.nffs.org/EconAdvisor.
Upcoming NFFSummit Webinars

Respirator Program Review

**Date:** Tuesday, March 10, 2020  
**Time:** 2:00 p.m. ET (1:00 p.m. CT)  
**Cost:** Included with NFFS membership, $199 for guests  
**Presenter:** Martha Guimond, Joseph Guimond & Assoc.

With the availability of N95 dust masks severely diminished due to the recent coronavirus outbreak, many foundries are considering the use of other types of respirators until the N95s become available once again. Now is the perfect time to review the requirements of an effective and OSHA compliant respirator program. Join NFFS for a timely review of the major elements of a respirator program, including fit testing, medical surveillance requirements, and employee training programs. This is important to both protect the health and welfare of your employees and to ensure you are properly managing the use of dust masks and respirators in your foundry.

Register: [www.nffs.org/NFFSummit0320](http://www.nffs.org/NFFSummit0320)

Hazardous Chemical Inventories

**Date:** Tuesday, April 14, 2020 (Rescheduled to accommodate Respirator Program Review webinar)  
**Time:** 2:00 p.m. ET (1:00 p.m. CT)  
**Cost:** Included with NFFS membership, $199 for guests  
**Presenter:** Martha Guimond, Joseph Guimond & Assoc.

The EPA requires foundries to maintain an inventory of hazardous chemicals used and stored within their facilities. An accurate chemical inventory is the foundation for compliance with many different reporting regulations, including Tier II reports, R Forms, emissions reporting, TSCA and more. But what needs to be included, and in what quantities? Join NFFS for an important conversation regarding how to develop a complete hazardous chemical inventory, and how this data can be used as part of the regulatory reporting process.

Register: [www.nffs.org/NFFSummit0420](http://www.nffs.org/NFFSummit0420)

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